



INDUSTRY:

ACCOUNTING AND TAXATION

Automating the daily email attachment download and uploading to the Docuware

Introduction

The client is a world-class Payroll Accounting and Taxation Firm with a team of expert bookkeepers and accountants who provide end to end solutions, from bookkeeping, accounting, tax planning & preparation to consulting and CFO services to CPA firms throughout the United States of America.

The Challenge

To automate the daily email attachment download and then upload to Docuware which is a content management system. This was a repetitive and high-volume task that consumed most of the FTE time.

Manual AHT per transaction - 15 minutes

Solution

Bots were deployed to launch outlook, download attachments for the previous day and the current day's emails, segregate emails larger than 500 KB and smaller than 500 KB. For those less than 500 KB, auto-upload would take place; for the ones larger than 500 KB, going to the Docuware and then uploading them was the process.

Outcomes

- **1 minute** - Bot AHT per transaction
- **90%** FTE time-saving at the minimum
- **100%** error-free data handling
- Data accuracy and faster processing
- No manual intervention required
- Elastic and Agile Scalability to handle changing work volumes

Applications Automated

- Microsoft Outlook
- Docuware

Processes Automated

- Data Extraction
- Data Segregation
- Data Upload
- Docuware Navigation

About - The Judge Group

The Judge Group is an international professional services firm with deep expertise in consulting, learning, staffing & search, and offshore solutions. We operate across the United States, Canada, and India from over 30 locations and proudly serve over 50 of the Fortune 100 companies across all verticals including financial services, healthcare & life sciences, insurance, technology, government, manufacturing, and telecom/utilities.

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