

Automating Expense Receipt Processing with InvoicelyAI Accelerator in UiPath



1530 hrs

Efforts Saved



\$55k

Cost Savings



96%

Success Rate Achieved



1.8k

Receipts per month

A mid-sized aviation company that leverages Pleo for managing corporate expense receipts, aimed to enhance their expense management process. The company sought to streamline and automate the handling of these receipts to reduce manual efforts, increase accuracy, and ensure timely processing. Through [InvoicelyAI](#), QualiZeal implemented a comprehensive solution that integrates automation and AI-driven models with human validation to successfully address the challenges. The result was a **significant reduction in manual work, improved accuracy in VAT calculations, and standardized receipt content, leading to a more efficient and error-free operation** that aligns with their [digital transformation goals](#).

Challenges:

● High Volume of Receipts:

With over 300 pilots regularly submitting receipts from various locations across Europe, the company deals with an enormous influx of receipts annually, ranging from 220,000 to 1 million. Many of these receipts involve Value Added Tax (VAT) charges, adding complexity to the processing requirements.

● Manual Validation Process:

The existing process for validating these receipts was highly manual and time-consuming. Each receipt required individual review and analysis, which not only increased the workload but also led to potential delays and errors in processing.

● Complex VAT Calculations:

The manual review process also involved complex VAT calculations based on the country or region of purchase. The team needed to meticulously check and verify VAT amounts and other line items, making the process both time-intensive and prone to inaccuracies.

● Inconsistent Receipt Content:

Receipts submitted by various stores exhibited inconsistencies in formatting and naming conventions for items, taxes, quantities, and prices. These inconsistencies further complicated the process, requiring additional time and manual intervention to standardize and interpret the data.

Solutions:

● Automated Invoice Download and Data Extraction:

Our Invoicely AI accelerator, integrated with ERP systems or similar platforms, automates the downloading of invoices and extraction of critical information. This data is then published to the Orchestrator Queue for further processing.

● AI-Driven Processing:

Each transactional item in the queue undergoes further processing through our Gen AI Accelerator. The appropriate AI model is selected based on the type of invoice, utilizing AI/ML capabilities and trained datasets to enhance processing speed and accuracy. This approach ensures that the most suitable model is applied to each specific scenario, thereby improving overall efficiency.

● Human-in-the-Loop Validation:

The system automatically validates the confidence score derived from the extraction process. If the score falls below a predetermined threshold, the items are flagged and sent to the Action Center for human validation—a process we refer to as "Human in the Loop." This step ensures that any uncertainties or low-confidence extractions are manually reviewed to maintain high data accuracy.

● Post-Processing and ERP System Updates:

Upon completion of data extraction and validation, the system performs post-processing tasks and applies necessary business logic. The processed data is then seamlessly updated back into the ERP system, ensuring that all fields and statuses are accurately reflected.

About



QualiZeal is North America's fastest-growing independent digital quality engineering services company. With a diverse portfolio of digital transformation services encompassing Quality Engineering, Digital Engineering, Advisory and Transformation, and Emerging Technology Testing, QualiZeal empowers organizations of all sizes globally to achieve quality excellence and sustainable market leadership. With a headcount of 750+ elite software quality engineers and trusted by 50+ global enterprises over 200+ projects across 12+ industries, QualiZeal is widely recognized for its pioneering innovation and industry-leading client and employee Net Promoter Scores (NPS).

QualiZeal has been acknowledged as the Fastest Growing Digital Quality Engineering Services Company in North America at the 2022 Global Choice Awards. Additionally, QualiZeal has also been named the winner of the Bronze Stevie® Award for 2024 Tech Startup of the Year (Services) category in the 22nd Annual American Business Awards®. We also have been recognized as a Major Contender in Everest Group's Specialist and Next-Generation QE Services PEAK® Matrix 2023 reports and as a notable provider in Forrester's Continuous Automation and Testing (CAT) Services Landscape Report (Q4 2023).



www.qualizeal.com

Copyright 2024, QualiZeal. All rights reserved. No part of this document may be reproduced, stored in a retrieval system, transmitted in any form or by any means, electronic, mechanical, photocopying, recording, or otherwise, without the express written permission from QualiZeal. The information contained herein is subject to change without notice. All other trademarks mentioned herein are the property of their respective owners.

USA Address - 9901 Valley Ranch Pkwy, Suite 2037, Irving, Texas 75063