

Assisting A Critical Utility Services Provider To Scale,

# Automate and Streamline its Invoicing Administration



## ABOUT PM AM

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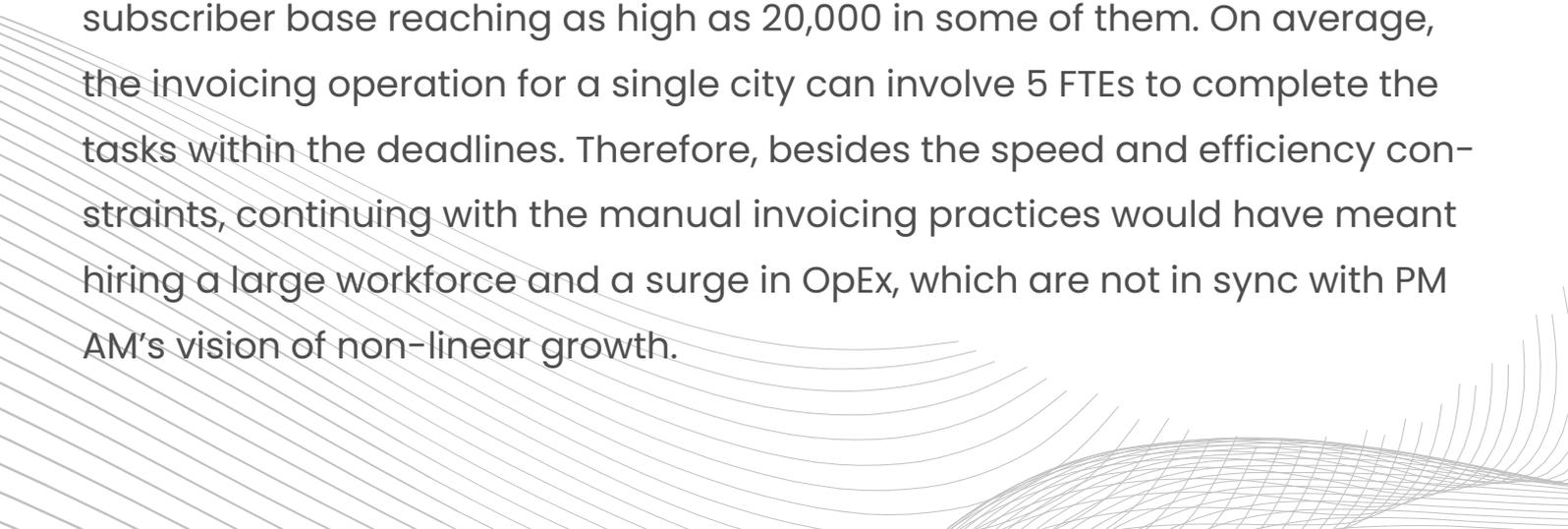
PM AM is a global pioneer in delivering backend support for emergency and first-response services. Its Full-Service Alarm Management solution has helped to enforce alarm ordinances in over a hundred municipal and city jurisdictions across the United States since 2004. PM AM's technology leadership, operational experience, and Best Practices have played a pivotal role in the success of the false alarm program in the US. It offers a comprehensive basket of solutions.

## THE PROBLEM STATEMENT

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PM AM's growing mandate essentially brought it head to head with a of efficiency and scale. While its service delivery platform is fully automated, calculating and invoicing the false alarm penalties per the ordinance in force for the respective cities was still predominantly manual. However, the invoicing cycle for each city involved 40 steps! Further, the need for strict compliance to run each invoice through over 100 preset rules and validate them using the information in PDF and excel files made this journey extremely slow, time-consuming, and error-prone.

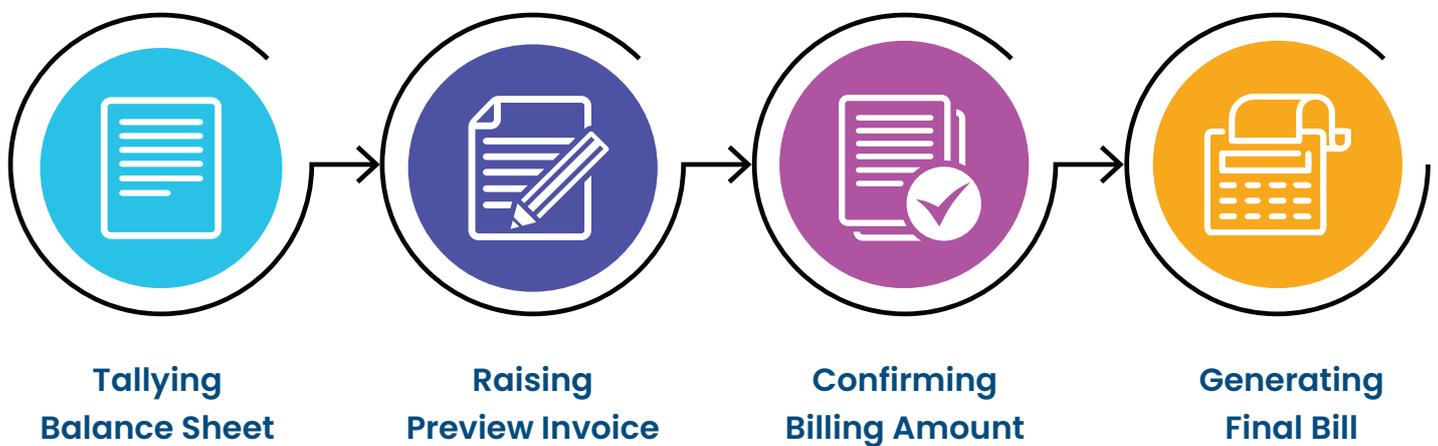
Also, PM AM is currently delivering its services to 125 cities in the US, with the subscriber base reaching as high as 20,000 in some of them. On average, the invoicing operation for a single city can involve 5 FTEs to complete the tasks within the deadlines. Therefore, besides the speed and efficiency constraints, continuing with the manual invoicing practices would have meant hiring a large workforce and a surge in OpEx, which are not in sync with PM AM's vision of non-linear growth.



Therefore, the organization needed a solution to scale and enhance the efficiency of the invoicing process while managing costs.

## THE SOLUTION

Our process architects and automation engineers used Process Mining to conduct an in-depth assessment of PM AM's invoicing operations. They identified that the company's "as-is-process" for invoicing involves four phases: tallying the balance sheet, raising the preview invoice, confirming the billing amount, and generating the final bill. The team concluded that automating all the steps within these four phases using an RPA bot will allow PM AM to achieve the desired speed and efficiency level while also delivering the scalability it needs.



Accordingly, the team designed, developed, and delivered a bot using SQL, a PDF reader with OCR capabilities and accounting rules, among other technologies. It can automate all the 40 steps involved to generate the invoice for PM AM's service consumers across 125 cities in the US. The bot initiates by downloading the billing data as batch files from the company's service delivery platform using API integration. It can:

- Notify the operator of mismatches in the billing data in runtime
- Schedule invoice preview and reconcile that all preview files are received
- Validate data using rules included in the PDF files and ensure billing is in conformance with the ordinance in force for a particular city
- Schedule for the generation of the final invoice
- Check the final invoice for errors, convert it into a compressed file format, ensure its quality and deliver it to the service consumers

A single point of control is maintained using an excel sheet. Here the operator can visualize the status of invoice processing for all the 125 cities in real-time. The solution prompts the operator for a review in case of a break in processing flow for a particular city and the possible reason for the error.

## BENEFITS

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The processing time for the invoices for all the 125 cities was reduced from 40 hours a week to just 8 hours, managed by a single operator

The team delivered a user-friendly solution for PM AM that can be easily configured and used even by operators from non-technical backgrounds, saving the cost of hiring specialized resources

The solution maintains all the activity logs in excel, simplifying post-processing audits

# OUR LOCATIONS

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