



BUSINESS PROCESS AUTOMATION SUCCESS STORY

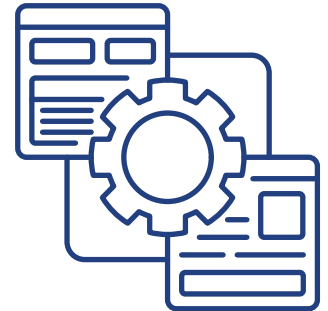
BILL RATES ADJUSTMENTS

The Schneider Downs Business Process Automation team developed an automated solution for a SaaS service provider who needed to produce annual bills to their clients for the software services provided.

The Manual Process

The client's annual billing process required the tracking of clients to be billed in the upcoming month along with analysis of each client's service agreement details.

- Previously, the service provider had to sort through each client's profile to determine if the client was to be billed the next month. Then, the provider had to determine if their client had exceeded any of the contractual service thresholds when calculating the new billing amount.
- Within the service agreement, one of the provisions allowed for the billing amount to be adjusted based on the rate of inflation. Additional fees could also be incurred if the client had exceeded their threshold of paid services in the prior year.
- Due to time constraints, billing reports were not being generated in a timely manner. This led management to issue bills without having the full picture on what could be billed.
- In some cases, bill rates were not adjusted, so the service provider was not able to optimize income.



The Impact of Automation

Our solution completely automated the billing adjustment process by generating the necessary report for the service provider.

The report contains all necessary information for the service provider regarding client's bills, such as: if a bill should be sent, current service level status, and adjusted billing amount. This also helped the service provider better monitor their billing rates and prevented one of their employees from being pulled away from work in order to generate this report.

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For more information visit www.schneiderdowns.com/rpa or contact Patrick B. Armknecht CPA, CITP at parmknecht@schneiderdowns.com.