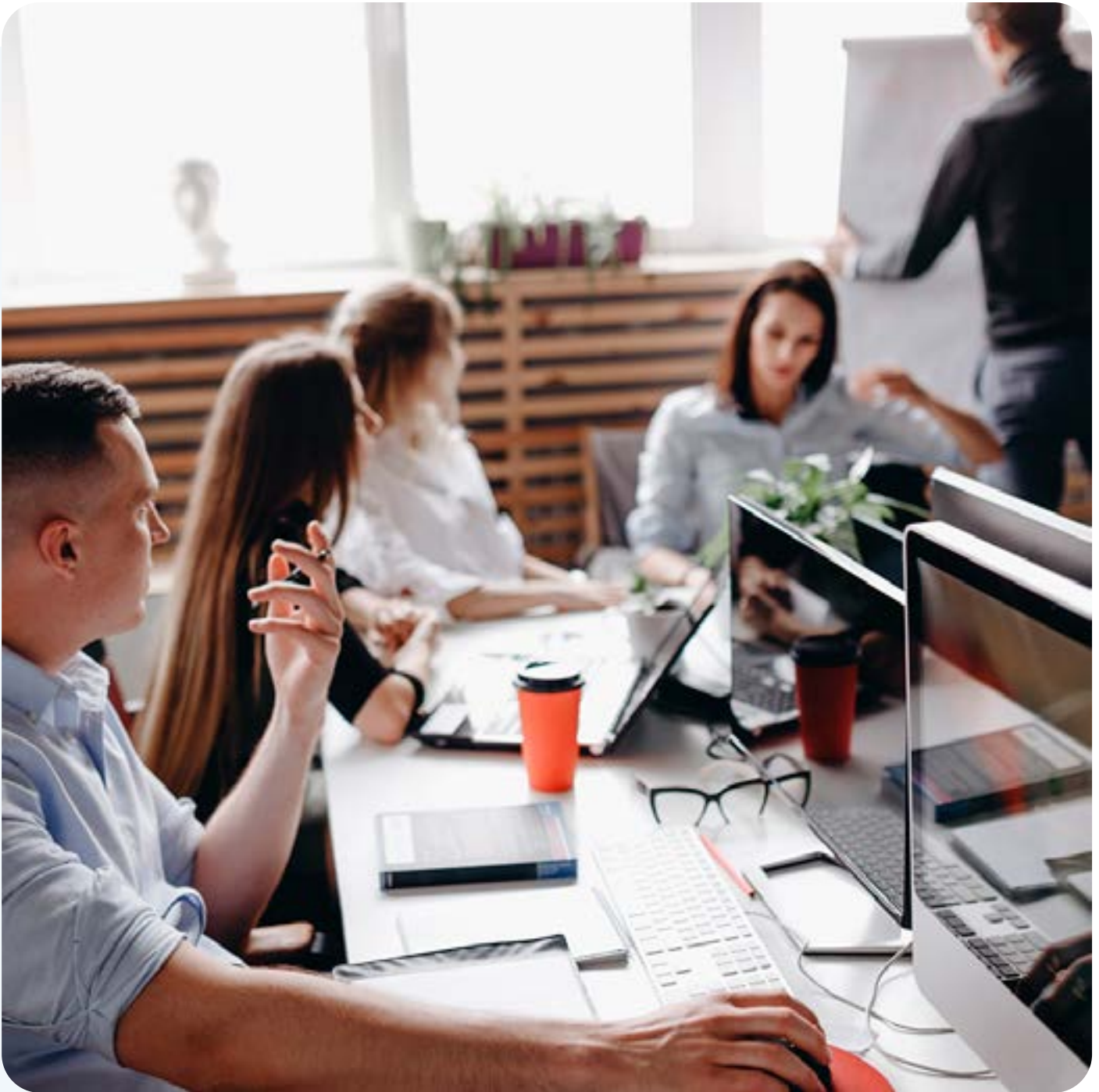




**Pinnacle**  
Complete Office Solutions



# Robotic Process Automation (RPA)

# You've got processes. We've got bots.

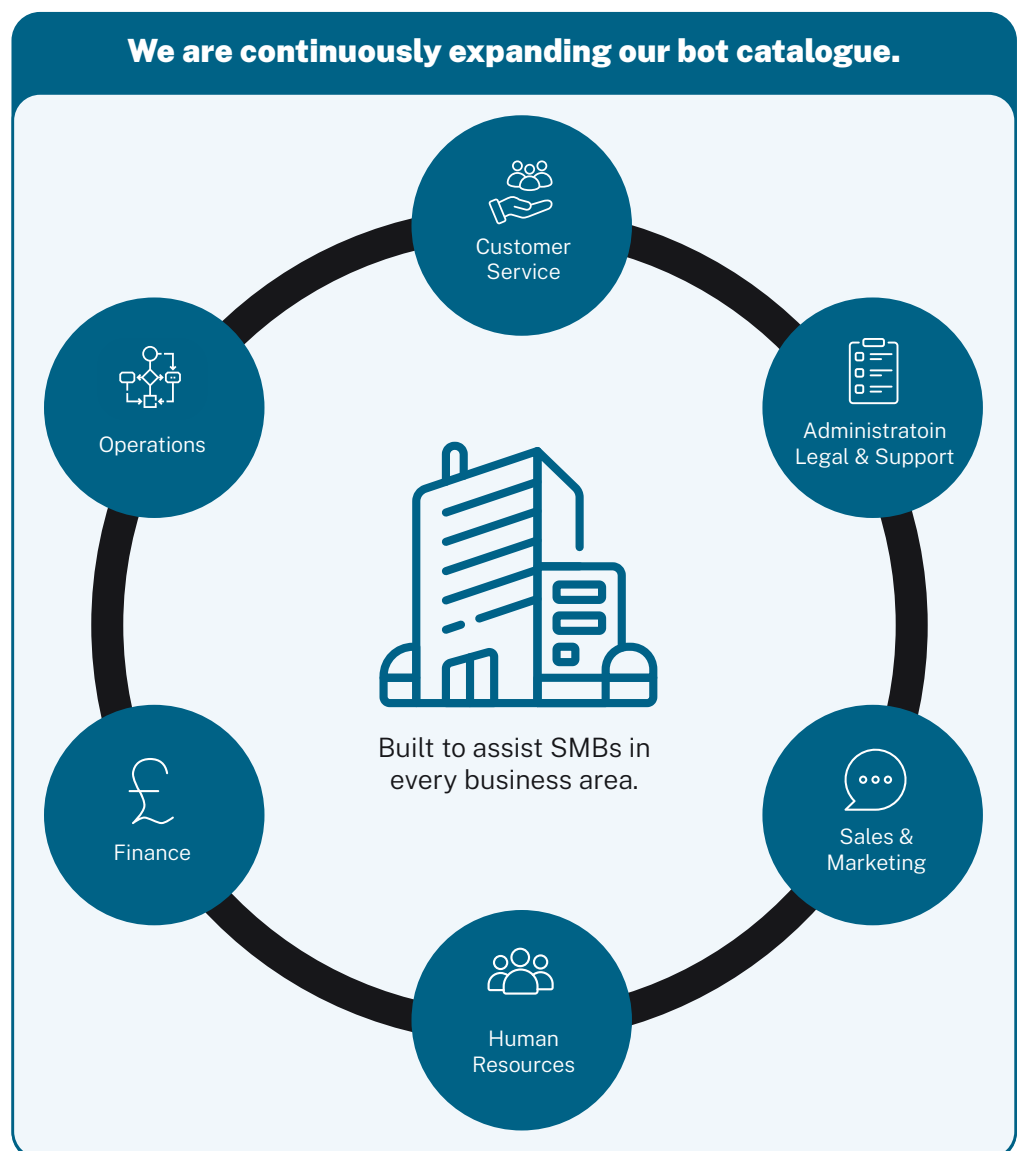
Say hello to Robotic Process Automation (RPA) – your key to speed, ease, and efficiency. Let our bots handle the mundane tasks while you focus on higher-value work.

This catalogue is your one-stop-bot-shop to explore our capabilities and find the perfect bots for your business needs. Embrace the power of RPA and propel your business to new heights!

Get in touch to start the assessment stage at no cost, and begin to fully understand how bots can revolutionise your business.

Use this catalogue as a one-stop-bot-shop. It's designed to help you navigate RPA and become more familiar with our bot capabilities and offerings.

In doing so, we can help you choose which bots are best for your immediate and future business needs.





# Finance

Save time, Save Money

## 1. MARGIN ANALYSIS BOT

Compares historical data to perform margin analysis for specific products and recommended the best price to sales and pricing teams.

## 2. BID PROCESS AUTOMATION BOT

Processes pricing requests from channel partners or resellers by swiveling data from external portals to CRM and updating the bid model.

## 3. ACCOUNTS PAYABLE INVOICE PROCESSING BOT

Extracts information from invoices and validates tax, purchase orders, goods received notes and payment terms and dates. Pays invoices accordingly.

## 4. ACCOUNTS RECEIVABLE BOT

Extracts information from cash receipts and validates tax, customer invoices, payment terms and dates. Applies cash received to appropriate invoice.

## 5. LOAN FORGIVENESS BOT

Downloads tax forms from bank portal, extracts information and sends to banking systems.

## 6. PROFITABILITY ANALYSIS BOT

Updates data from the CPQ tool to profitability analysis tool.

## 7. TREASURY/E NETTING AUTOMATION BOT

Performs daily intra-entity netting processes

## 8. CLAIMS AUTOMATION BOT

Extracts information from claims documents and transfers the information toward claim processing.

## 9. FINANCIAL CLOSE AND REPORTING AUTOMATION BOT

Downloads ledger information from ERP and prepares Financial Close Package.

## 10. PRE-BILLING AUTOMATION BOT

Bills pre-work of extracting meter reads, validates contractual pricing agreements, applies exceptions, applies tax structures.

## 11. CUSTOMER BILLING BOT

Bills pre-work of extracting meter reads, validates contractual pricing agreements, applies exceptions, applies tax structures.

## 12. ORDER PROCESSING BOT

Processes customer orders in the system

## 13. DUNNING LETTERS CREATOR BOT

Downloads reports from enterprise software and utilises the data to prepare and distribute statement emails and dunning letters.



# Customer Service

Enhance the customer experience

## 1. ORDER TRACK AND TRACE BOT

Tracks shipment status of orders dispatched to customers and provides updates via email and portal.

## 2. SAFETY STOCK MONITOR BOT

Monitors safety supplies inventory and places orders to maintain stock.



## Sales & Marketing

Deliver the right message on the right channel at the right time

### 1. SALES REPORTS BOT

Creates reports from multiple sources of information and automatically delivers via email for increased productivity and meaningful time savings, anytime, anywhere.

### 2. EMAIL CAMPAIGN BOTS

Sends promotional email campaigns to customers.



## Administration, Legal and Support

Help people and processes work better together

### 1. ATTENDANCE MANAGEMENT BOT

Registers employee check-in and check-out details.

### 2. DIGITAL MAIL ASSISTANT BOT

Identifies the recipient's email address and sends a scanned copy of the physical mail to their inbox.

### 3. RESOURCE UTILISATION BOT

Performs resource utilisation across accounts.

### 4. EXHIBIT PACKAGING BOT

Process and packages legal exhibits quickly and accurately, creating new levels of efficiency.



## Operations

Do more with less

### 1. SWIVEL SEAT AUTOMATION BOT

Automates agent actions on the desktop such as swivel seats, asset management of database and administration in ticketing tool.

### 5. AUTO SCRIPS BOT

Set of scripts and bots that automates troubleshooting by processing steps to resolve common technical issues and requests.

### 2. PASSWORD RESET BOT

Allows passwords to be reset directly from the logon screen or by web access.

### 6. MANAGED SERVER ORCHESTRATION BOT

Automated Server Provisioning (ASP) solution to build and deploy a fully managed virtual server.

### 3. EXCEL TO APP/EXCEL RECONCILIATION BOT

Ensures data between an application and a report, or between two reports, are in sync.

### 7. APP TO APP RECONCILIATION BOT

Ensures data between two applications are in sync.

### 4. LICENCE MANAGEMENT BOT

Automatically assigns a license to an end user after validating the necessary requirements, such as a contract or an order.

### 8. SERVER AUTOMATION BOT

Installs software, installs patch and performs server validation after change and runs server script.



# Human Resources

Empower your employees

## 1. PAYROLL AUTOMATION BOT

Uploads payroll statements into bank portal for salary disbursement and payroll processing.

## 2. SERVICE ANNIVERSARY BOT

Sends reminders to managers about upcoming work anniversaries within their teams. Also sends congratulatory note on behalf of company leadership to the employee on their work anniversary.

## 3. EMPLOYEE ONBOARDING BOT

Sends welcome emails to new employees with onboarding instructions.

## 4. ASK HR CHATBOT

Answers employee questions automatically and immediately, saving time and creating a better, more satisfying employee experience.

## Another day at the office, only easier.

It doesn't matter what industry you're in, or if your business is small, medium or somewhere in between. As a strategic partner, we're here to help you improve the way you work by automating manual processes so you can do more with less human intervention and lower costs. Xerox® Robotic Process Automation Service helps you stay flexible in the face of change, allowing you to save, plan and pivot as needed. Don't see a bot for a process you'd like to automate? Let's work together to develop a custom bot to address your unique needs.

**1.** We help you evaluate your current processes, no matter how big or small they are.

**2.** We work together to select workflows to automate based on business value and expected ROI.

**3.** We virtually automate and run your processes using bots.

**4.** We help you create a better employees experience by freeing up your staff to focus on higher-value work while bots take on routine jobs.



### Ready to go

Hit the ground running with an extensive pre-loaded bot catalogue for SMBs.



### Fast Deployment

5-8 weeks for most implementations and hosted on Xerox cloud or on-premise



### Full Service Offer

Single provider, one-stop-bot-shop designed for SMBs.



### ROI Calculator

See your savings. Input costs and hours spent on tasks and check ROI with the bot.



### Simplified Pricing

Annual licence fee per bot tailored to your business needs.



### Operational Efficiency

Cost savings of up to 30% and invaluable time savings that boost productivity.

**xerox**



Learn more about Pinnacle Complete Office Solutions  
Robotic Process Automation (RPA)  
**02920 365 222 Option 1**  
[www.pinnaclecos.co.uk/RPA](http://www.pinnaclecos.co.uk/RPA)