

# Automation opportunities in processing documents and invoices 2/26/23



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In this article we will look at ways to automate processes using various solutions, that is, how to process incoming PDF invoices that are manually entered into your system, the easiest way to compare data between your systems, and what tools you can use for creating solutions.

## *Power Automate*

To process PDF invoices, you can use Power Automate software, which allows you to develop a wide range of task automations. You can use it to create various solutions, including the processing of PDF files by extracting only the information you need.

### Advantages

- No prior knowledge of programming required.
- The user creates workflows visually, so the steps are easy to follow and update as needed.
- Compatible with other Microsoft and Google Suite products. For example, you can set up automated further processing of an incoming email containing an invoice.

### Disadvantages

- There may be no specific functionality for developing more complex solutions.
- Limited scope for customisation depending on available connectors and operations.
- Depending on the required functionality and the number of users, you need to buy a suitable subscription plan.

Power Automate allows you to set up automations for invoice processing. Workflows can be developed for data transformation and filtering, which facilitates data comparison between your systems. Power Automate offers a variety of workflow templates that can help the user save time doing those tasks.

## *Alteryx*

To perform the same task, as with the previous example, you can use Alteryx to set up workflows in a way that is easy for the user to understand. Again, this means that no prior knowledge of programming is required to create solutions.

### Advantages

- Easy user interface, as you can drag and drop particular operations into your workflow.
- For more complex solutions, it's possible to insert Python or R language code sections, which provide additional options for customisation.
- Capable of processing vast amounts of data and providing extensive data analytics functionality.

### Disadvantages

- Cost may be comparatively high depending on the chosen licence.
- To efficiently manage the platform's wide range of functionalities, additional training may be required for working with the platform.

Alteryx largely provides a wide range of options for data transformation functionality. Using various data sources, this may be an easy solution for comparing data between different systems, while providing the user with an easily traceable sequence of operations.

### *Python*

Another option is to use the Python programming language and develop a customised solution that allows bulk processing of PDF documents.

### Advantages

- Python is an open-source programming language. Its language specifications and source code are publicly available and freely usable.
- It's possible to develop compatibility with just about any software.
- You can use a vast amount of publicly available information, including various ready examples.

### Disadvantages

- Depending on the functionality of your preferred solution, a suitable level of programming knowledge is required.
- Development time to program a specific solution.

While Python saves you money on licences, providing the required additional programming competence may prove as expensive as buying specific software.

## Conclusions

There are many platforms that can help you create various types of automations. In this article we have looked at just a few of the tools you can use. All these solutions allow you to read information from PDF, extract information from required fields, such as invoice number, issue date, due date, amount and any other required information, and store it in your preferred format that you can upload to your accounting system.

The Python open-source programming language is an excellent solution for developing automations if your company has access to programming competences that you can use in automating small tasks.

The Power Automate platform is special in that it offers an easy and intuitive interface with a variety of solution templates. This platform allows multiple people to work simultaneously on the same project. And it's easily compatible with other Microsoft software.

Alteryx provides extensive functionality for transforming data and extracting data from various sources with automatic transformation and processing, using a handy interface. Extra adaptability is available for more complex functions, using Python and R language scripts.

In partnership with Alteryx, PwC offers to develop automations for you by providing ready-made workflows for use as needed. This business model allows you to use a robotics tool without buying a licence. You only

pay for building and using the required workflows (the SaaS model). And you do not have to involve your technical experts in building workflows.