



AUTOMATING BULK CASE CREATION TO IMPROVE BUSINESS PROCESSES



Executive Summary

Our client, a leading provider of global business administration and compliance solutions, approached EvonSys to help them streamline their case creation process. The existing manual process was impacting customer service delivery and taking days to complete. EvonSys worked with our client to create an automated solution that allowed for bulk case creation based on data from Excel, resulting in a significant reduction in the time taken to create cases.

Client's Challenges

Our client's customer service associates (CSAs) were struggling with a manual case creation process that was taking days to complete, impacting the company's service delivery. The CSAs were required to create cases manually based on data from Excel spreadsheets, which were often huge (up to 10,000 lines). The process required grouping lines into a single case, which was time-consuming and error-prone.



The Solution

EvonSys created an automated solution that streamlined the case creation process, reducing the time taken from days to just a few minutes. The solution allowed for bulk case creation based on data from Excel, with the system reading both old and new formats of Excel. The system also validated data and handled data issues, while retrieving additional case information from other APIs.

EvonSys developed a portal to upload the Excel file and display lines from Excel in a table format, with the user interface designed to select multiple services for processing the Excel file. Error clarification was made easier, with lines containing errors showing an error icon, which lists the properties and errors in the specific line to avoid confusion.

The solution also enabled multiple API calls during case creation to retrieve additional data from other systems, with invalid data and/or API failure details saved back to the table with the status. Once cases were created, they were sent to another system via an API call, with a confirmation email sent to the list of users.

The Outcome

The automated solution resulted in a significant reduction in the time taken to create cases, from days to just a few minutes. The solution was implemented within two months for the initial service, followed by updates to deliver more services. Currently, the solution is built for three different services, with plans to extend it to more services in the future.

The new automated process has improved our client's service delivery, and the company is now able to better serve its customers. Our client was very satisfied with the outcome, and the success story is a testament to the expertise and dedication of the EvonSys team.

**Let the experts at EvonSys help you unlock
the potential of your business today!**

Info@evonsys.com

