

A photograph of a woman and a man in an office setting. The woman, wearing a black sleeveless top and a red skirt, is leaning over a desk and pointing at a tablet held by the man. The man, wearing a grey suit and a blue tie, is looking at the tablet. In the background, there are office desks and windows.

Use Case:  
Finance +  
Accounting

# Fast, accurate P&L reports with RPA

Up-to-date performance data is critical in competitive marketplaces. Yet the process of compiling a daily Profit & Loss report is often inefficient and time-consuming— not to mention the fact that manual creation of such reports leaves quite a bit of room for inaccuracies.

With RPA, your company can have daily reporting while saving time and improving productivity, all with increased accuracy.

## The Process: Daily P&L reporting with UiPath

### A UiPath Robot:

- Gathers data from varying reports
- Compiles the data into the daily P&L report
- Verifies the data
- Delivers the report



## The challenge

A global financial services company is required to submit daily P&L reports, which consist of more than a dozen individual reports or metrics sheets. Each day the company's product control team must import a number of General Ledger reports into Excel spreadsheets or legacy systems in order to create a larger scope P&L report. These compiled reports are then manually edited and combined for submission to the front office.

## The solution

Every day, a UiPath software robot is triggered to automatically populate the report data, validate it and generate the final report—without any manual intervention. The robot then emails these reports to the front office, allowing them to be reviewed before they are uploaded into the head office web application.

## The benefits

- 100% accuracy
- 70% reduction in AHT
- 150 hours saved

## How will automation transform your business?

We'd love to tell you more of the great things UiPath can do to help you drive sustainable financial growth.

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