

Case Study: AFH Payroll - Director Only / Owner Managed Payroll Submissions.

November 2022.

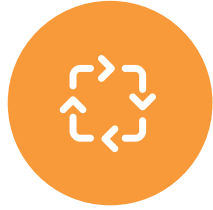


We make time.



Background to our client.

- AFH Payroll Solutions Ltd offer an outsourced payroll solution. Based in Eastbourne, England, they work small, medium and large businesses and not for profit organisations.
- FD Intelligence had already built a couple of different automation bot to handle payroll process, and met AFH at an event speaking about some of this work.
- Being a dynamic, forward-thinking business – AFH immediately wanted to find out more and engaged FDI to look at how bots might make their operations more efficient.
- Before commencing any project, at FDI we always firstly have to understand the business in question, and the manual (or human) processes involved in their day-to-day operations.



What we did.

- In working with AFH we had an idea of what we might find. But all companies are slightly different, and with AFH we identified that the logical first automation to be undertaken with the biggest potential for ROI would be for their Director Only and Owner-Managed Payroll submissions, run using Sage and also PayDashboard.
- Having reviewed this process in detail with the AFH team, we found that automation could start from the point of creating a folder for the specific client on the AFH server, through the process of checking data submitted for payroll and bringing this data into Sage 50 Payroll. We would then also be able to automate beyond that, through the transfer of information into PayDashboard, the uploading of summaries for client approval and even into AFH's billing process.



What the robot now does.

- When the AFH team now trigger their bot, this begins a series of processes as described above. Initially it checks it has all the information required to actually run a payroll, if any information is missing for a client it simply alerts the team and they can immediately chase the relevant client and gather the missing information.
- The bot then runs the full Sage process, which includes running checks to ensure the 'Payments' that are logged in Sage match the initial reference spreadsheet at various stages, including sub-totals such as Tax, NI, EA and Pension contributions – and it even changes the colour of the cells as it verifies this so it's immediately visually clear. Again, if anything does not match the team are alerted immediately.
- The bot then exports the required information for PayDashboard, before it then logs in, selects the appropriate client, uploads the file, and again checks various data points as it goes.
- The final part of this bot is that it then logs into Senta (AFH's Practice Management Software) where it logs that the payroll has been run and generates an email alert which it sends out to the client to gain their approval to complete the payroll run.

We make **time.**



Impact we had...



100+ payrolls successfully run automatically per month, taking an average of under eight minutes.



40+ report packs uploaded to Senta practice management automatically per month, taking an average of two and a half minutes.



Allowed the team to increase velocity and take on more work despite staffing constraints. The company has recently significantly increased the number of payrolls they run, partly because of the additional capacity this bot provides.



For AFH Payroll, we've made time!

We make **time.**



Testimonial.

“It has been great working with FD Intelligence to bring Robotic Process Automation into our business. The team approached the project from a very business perspective, truly understanding our processes by undertaking a detailed discovery process while mapping where robots could assist our team. This approach gave us confidence of the impact this would deliver and the time it would save. We’ve been delighted with the result and how we can better utilise our resources. We will continue to actively look at our other processes for automation.”

Fiona Hill, Director, AFH Payroll Solutions Ltd.

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