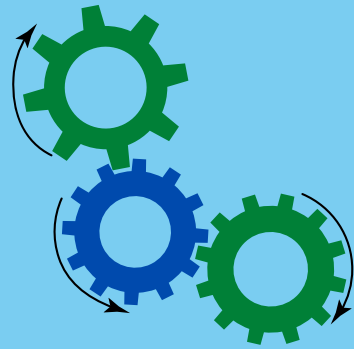


SPANISH TAX CLAIMS AUTOMATION

Story of how we automated the process filing thousands of withholding tax claims manually

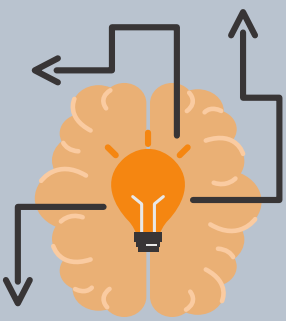
THEIR STORY

This client is a European tax consulting agency, which specializes in withholding tax consulting, claims and compliances for institutional investors. They work globally for settling claims in many different countries, which is done with the help of their withholding tax recovery software.



THE PROCESS

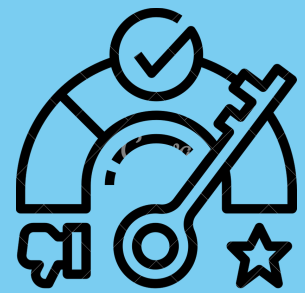
The claim process starts by uploading client income data in their proprietary recovery software, which generates .210 file for each investor and a consolidated summary excel. These files act as an input for the RPA process.



1. The bot picks up the .210 file and uploads it in the Agencia Tributaria portal.
2. Some claim specific data generated in the portal is scraped by the bot.
3. The bot runs certain validations and downloads the tax form PDF generated in the portal
4. The bot enters the form number generated from the portal in the summary excel
5. First 2 pages of the downloaded PDF are deleted.
6. Current date and signature is entered at the appropriate positions in the PDF form.

KPIs

- Eliminate the errors across the process of Spanish withholding tax claims.
- Saving time and manpower required for the process.
- Providing maintenance assistance for the deployed automation
- Reducing the time required for Spanish withholding tax claims process manually.



EMERGEFLOW SOLUTIONS AND RESULTS



- Firm can now easily process 1200 claims per week using this end-to-end automation.

- About 80% time is saved as compared to manual process, which gives scope for processing additional claims in the same amount of time.

- The important process of submitting tax claims is now 100% error free.



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