



# CASE STUDY

## **Automation: Accelerators & Framework for Process Optimization**

The client is one of the leading Australian brewers and manufacturers of beverages.



## Client Situation

Multiple requirements of process optimization across different functions including sales support, order management, customer profile management, and employee services.



## Client Challenges

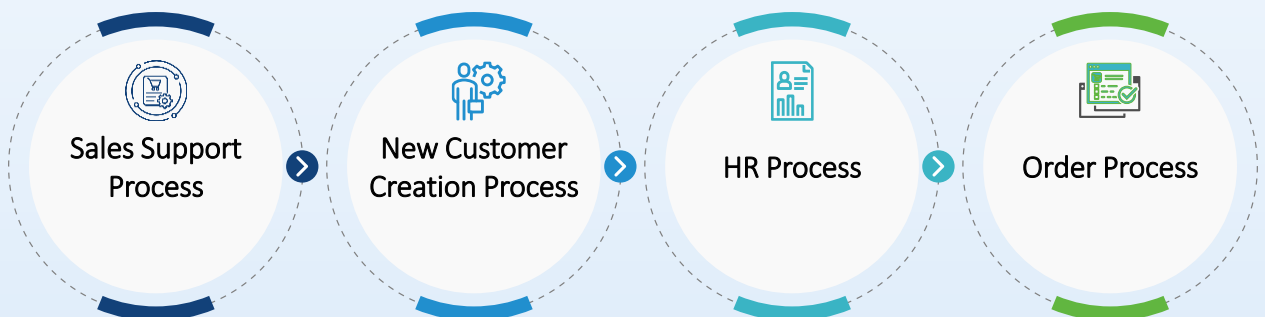
- The Sales team manually enters invoice data into the SAP system spending nearly 3 hours in the process
- Requests come through the mail, which needs to be read and the data validated. To identify the invoice, notify stakeholders, evaluations, etc. take huge time due to back-and-forth communications.
- Since the requests come separately, a lot of time is wasted in repeated tasks like application log in/log out, etc. each time
- New customer information comes in emails, this data has to be extracted and uploaded to the client internal customer data portal
- This is a monthly process to take stock of the employee leave balance and approve any planned leave requests that employees may have submitted
- This is a highly tedious process because each line manager has to perform this task
- Based on the different vendors and the quantities ordered, certain discounts are paid out
- Create order details will come through the mail, validate the status of the order and close the order accordingly.
- In case the order has been dispatched already, the order needs to be manually closed in the system to release additional inventory allocation



## ITC Infotech Solution

ITC Infotech provided a comprehensive solution to the client from design to implementation and program management. Specific activities performed are:

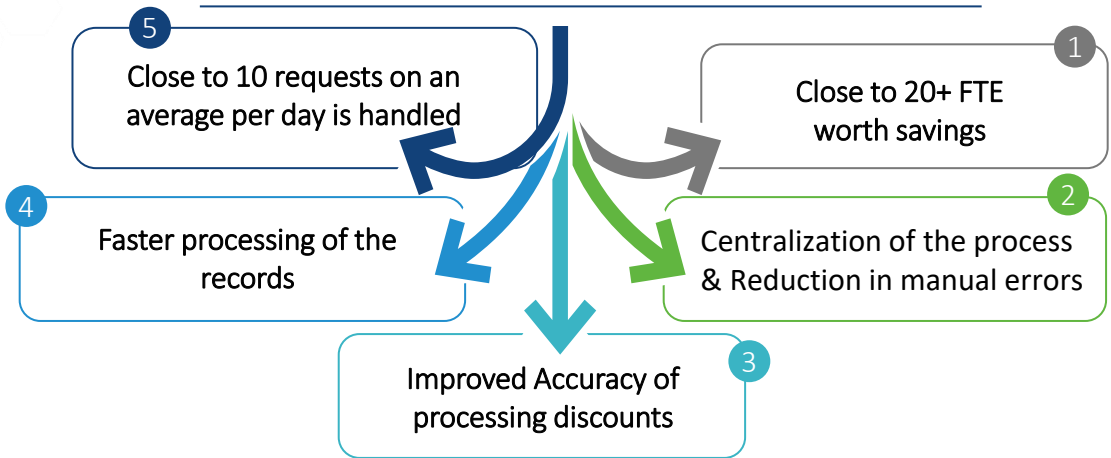
- A bot was designed to perform invoice creation in SAP. Every new request email is read by the bot, post which it logs into SAP to create the Sales Order
- A bot was designed to perform the discrepancy identification. Based on rules set by the client, the bot determines the bracket under which the request should be categorized and duly notifies the concerned team
- Once the teams take the necessary action, they upload the request to the respective folders
- A bot was designed to perform customer info record creation and synching of transactional records along with master data tables
- The bot extracts data from emails and populates the same in the internal portal
- A bot was designed to perform the data generation, and this was happening in a centralized manner
- The HR team uploads the data dump in a shared location. On receipt of the request from a line manager, the bot accesses the reference data from the shared point to be used in the request sheet
- The bot downloads the master data using a custom SAP code
- Then the bot runs a set of macros on the request sheet, retrieves the results and generates a report
- The bot downloads the master data from the employee data dump. Then the bot runs a set of macros on the request sheet, retrieves the results and generates a report
- If the status of the process is dispatched, then the bot goes ahead and closes the order in the system. Bot logs and creates the order in the system





## Results & Client Benefit

ITC Infotech completed the engagement successfully. Specific results and client benefits achieved are discussed below:



## Bottom Line

ITC Infotech with its automation accelerators and frameworks provides solutions across all functions, departments of the organization from discovery to implementation to value orchestration and support.



## About ITC Infotech

ITC Infotech is a leading global technology services and solutions provider, led by Business and Technology Consulting. ITC Infotech provides business-friendly solutions to help clients succeed and be future-ready, by seamlessly bringing together digital expertise, strong industry specific alliances and deep domain expertise. The company provides technology solutions and services to enterprises across industries through a combination of traditional and newer business models, as a long-term sustainable partner.

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