

XTGlobal Automated and Transformed the Purchase Order Processing Workflow for a Top Global Battery Manufacturer



About Client

Since its foundation in the early 1940s, a leading global manufacturer of high-performance alkaline batteries, specialty cells, and rechargeables, has been a trusted name in personal power solutions. They have become a global icon renowned for their commitment to quality, reliability, and innovation. The company employs over 3000 people worldwide and operates regional headquarters in the USA, EIMEA, and Asia.

Client Challenge

The client faced significant challenges in their manual process of handling purchase orders (PO) and document data extraction, mainly due to the multi-language nature of the documents. The process began with downloading purchase order PDFs from emails and storing them in a shared drive. Every day, the SAP table data needed to be downloaded to an Excel file. The next step involved comparing the PO data with the multiple SAP tables retrieved in the Excel file. This task was tedious and prone to human errors. Additionally, the process required validating the correct 'Sold To' and 'Ship To' IDs from an Excel mapping file, adding another layer of complexity. This entire sequence of steps had to be repeated for all the purchase orders available in the shared drive. The manual nature of this workflow was labor-intensive and introduced the risk of inaccuracies and delays, significantly affecting operational efficiency and productivity.



Tech Stack

UiPath Document Understanding with AI, ML and Action Center

XTGlobal Business Solution

XTGlobal was pivotal in transforming the client's purchase order processing workflow, delivering a streamlined, efficient, and automated solution. The comprehensive approach addressed the client's challenges by implementing several key steps and technologies.



Process Design Document:

A detailed document was created to outline the current manual process workflow and propose an optimized workflow that minimized steps and identified potential exceptions. This step was crucial in understanding the pain points and designing a solution that addressed all aspects of the process.



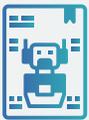
Email Monitoring and PO Document Handling:

A time-based trigger was developed to monitor incoming emails for new PO documents. When an email with PO documents was detected, the trigger automatically downloaded the documents, stored them in a shared drive, and added the document information to a processing queue. This automation eliminated manual email monitoring and ensured that all PO documents were captured efficiently.



Daily SAP Table Download:

Another time-based trigger was developed to automate the daily downloading of SAP tables. This ensured that the latest data was always available for comparison and validation, reducing the manual effort required to keep the data up-to-date.



Document Understanding Framework:

A sophisticated Framework using AI and ML technologies was created to automate the data extraction process from PO PDFs. As soon as a document was added to the queue, the framework triggered automatically and proceeded with data extraction. This automation significantly reduced manual data entry errors and improved processing speed.



Human-in-the-Loop Automation:

To handle cases where human input was necessary, a Form Task activity was implemented in the Action Center. This allowed business users (SMEs) to input "Sold To" and "Ship To" values, ensuring accurate data mapping while integrating human oversight into the automated process.



Automated Confirmation Emails:

The process of sending confirmation emails to each customer's business unit was automated. These emails included status reports on the BOT run, informing stakeholders about the process and its outcomes.



Thorough Testing:

Extensive testing was conducted to ensure the automated BOT could handle all business process scenarios. This step was essential to guarantee that the solution was robust, reliable, and capable of managing the diverse range of documents and data involved in the client's workflow.



Deployment and Orchestration:

The solution was deployed into an orchestrator, providing a centralized platform for easy monitoring and maintenance. This deployment facilitated seamless management of the automated processes, ensuring they ran smoothly and efficiently.



Scheduled Monitoring:

Each BOT run was monitored at scheduled times to ensure the process was completed successfully. This ongoing monitoring helped identify and resolve any issues promptly, maintaining the integrity and efficiency of the automated workflow.

Business Benefits



Enhanced Accuracy and Efficiency:

Automation of manual processes resulted in significant improvement of accuracy and efficiency.

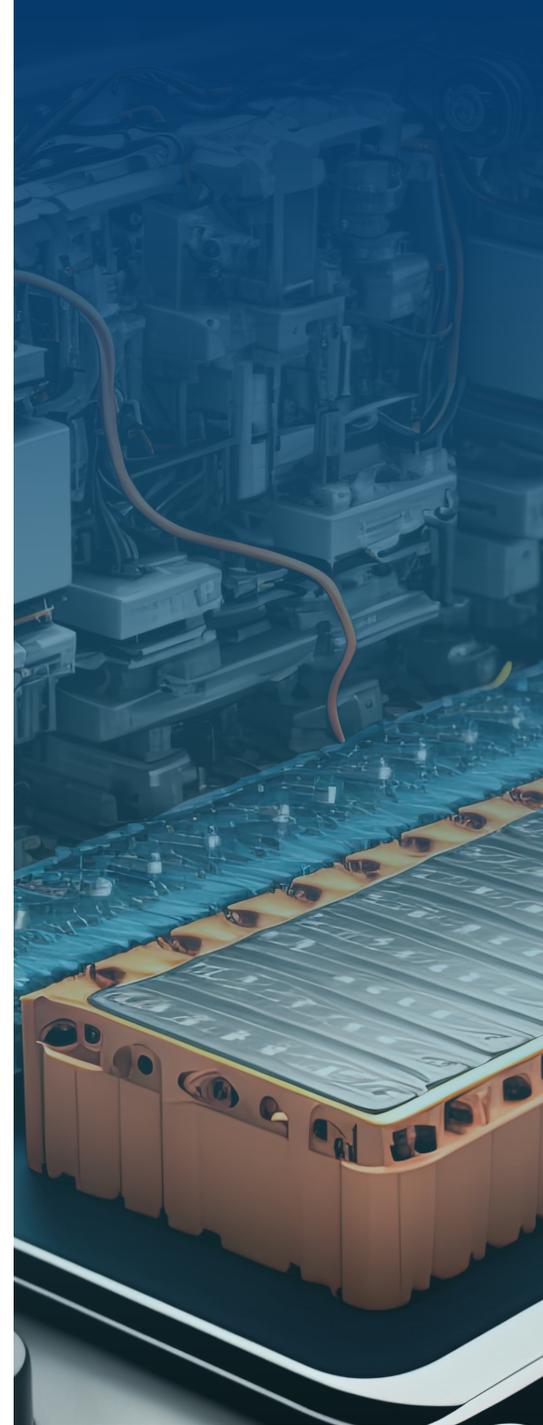


Optimized Resource Utilization:

Freed up one full-time equivalent (FTE) and two part-time FTE hours from repetitive manual tasks, enabling employees to concentrate on more critical and value-added activities.



Achieved annual savings of USD **160,000** through the reallocation of full-time resources.



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