

Moving from manual purchase order processing to precise automation with HULFT

HULFT's Client Company is one of the world's largest providers of comprehensive metal cutting solutions for milling, stationary tools, hole making, and tooling systems. They offer a range of tools to perform a broad set of tasks, from micro milling required in medical manufacturing to tools needed in automotive and aerospace development. Their customer base includes all of the global automobile manufacturers, several world-wide distributors, and hundreds of smaller companies. The Client Company is present in more than 75 countries and employs over 4,000 people. Their annual revenue is USD 1B.

Situation

The Client Company's North American subsidiary has a department of 20 employees dedicated to manually processing thousands of purchase orders. Increasing efficiency in processing purchase orders with precision and customer responsiveness is a priority for several important reasons. Improving employee morale, increasing speed and accuracy in purchase order processing, and improving overall cost were the top priorities for the customer.

Purchase order processing was often backlogged for a number of reasons. Until just recently, purchase orders had been received via fax. Now, purchase orders are received via email as PDF attachments, with employees processing these from a shared email inbox, with individuals assigned to particular geographic regions linked to the customer name.

Challenge

Identifying the point of responsibility in the current system has been a challenge. Once the purchase orders are received, the details are manually entered into an order screen in the client's ERP software. Purchase orders are received in hundreds of different formats. For example, one purchase order might have contact name and phone number identified, while the next one might only have contact email. Product codes are frequently mismatched with any number of prefixes, and a single file may be overloaded with a combination of data. These nuances often required employees to decipher the intended meaning. Human errors occurred.

The significant number of incoming purchase orders, the amount of necessary information included in purchase orders, and the variances in format of incoming purchase orders justified the high number of employees assigned to this department. The department supervisor recognized the inefficiencies in the present system and desired an automated system that would upload purchase order information directly from the unopened emails and their PDF attachments, freeing up employees to address customer service needs in more responsive and personalized ways.

The HULFT solution

HULFT worked with purchasing personnel to help them create a customized no-code software solution for the Client Company's Purchase Order Processing Department by reading the attached PDF's within the original email, doing optical character recognition (OCR) work to extract the pertinent data,

identifying the meaning of the data, loading the data into a database and then cleaning up the variations through artificial intelligence algorithms. The initial working data extractions, processing, and workflow management system was created in under 5 hours using the HULFT Integrate platform of no-code connectors that are easily wired together and mapped for data transformation, as well as using HULFT Data Capture Services.

HULFT worked closely with department leaders during the initial phase. During these meetings, HULFT relied on its expertise in organizational change processes and challenges to listen to pain points and elicit requirements in order to allow HULFT to create a customized software solution while also providing often neglected strategies for solutions to the behavioral characteristics of employees that typically surface during process change implementation. The HULFT team asked key individuals in the Client Company to walk through internal processes from start to finish. HULFT listened, outlined, asked questions, sought clarity, and captured necessary information to help non developer personnel create automated processes to provide a responsive, and customize the HULFT Integrate software solution.

HULFT process support for implementation

HULFT recognizes the inherent challenges that often accompany the implementation of a new software solution, especially when that solution's success hinges on the proper use of legacy data and systems. Some of these challenges often include differences in skill levels among team members, early adopter enthusiasm surpassing that of other key personnel, allocating time for training, addressing the "implementation dip", and communicating process hurdles and successes throughout roll-out.

The HULFT team is equipped with a deep knowledge and understanding of organizational change and we include preemptive measures to help the client organization's leadership team in successful roll-outs. HULFT's longevity in the field and the diverse background are purposefully sought among team members adds value to the work far beyond software development products.

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