



CASE STUDY

RPA in Motion: Uniting Contract, Invoice, and PO Management for an Energy Giant

Organisation Profile

The client is a prominent player in the natural gas sector and a Fortune 500 company, boasting over 140 years of experience in meeting global energy demands. As a diversified energy manufacturer and logistics provider, they excel in delivering innovative solutions that drive efficiency and sustainability in the energy landscape.

Industry

Oil and Gas

Results

Increased Process Efficiency by

60%

Manual Effort required

70%

Enhanced accuracy, improvement by

95%

Business Problem:

The client struggled with inefficient manual processes, including receipt handling, contract updates, and PO management, leading to increased errors, delays, and resource-intensive operations. These challenges hindered operational efficiency, impacting cost control and productivity. The lack of automation created bottlenecks in invoice processing and purchase order management, emphasizing the need for reliable RPA solutions to streamline workflows, minimize errors, and improve overall performance. Ensuring BOT functionality and stability became essential to maintain seamless operations and sustain the client's competitive edge.

Solution:

Business Receipt Processing

- Extracted data (PO number, line item number, quantity) from image or email receipts.
- Processed sample receipts from suppliers, mobile-captured images, and PO data inputs.
- Updated extracted information into PeopleSoft for receipt processing.

EBB Gas Flow Measurement

- Retrieved meter points from multiple websites and extracted energy readings for each.
- Compiled data from all meter points into a single FlowCal file.
- Executed daily in the morning for accurate gas flow monitoring.

Force Majeure Bot

- Extracted relevant data from Force Majeure Excel sheets.
- Updated TIPS contract processes and reflected results on the client's dashboard.

Challenges:

- Automating receipt processing for 500,000 POs from 20,000 suppliers.
- Eliminating manual tasks in daily gas flow data collection.
- Updating Force Majeure terms across all contracts.
- Automating Negative Suspense Invoices to cut labor costs and recover funds.
- Enhancing Allegro for smoother gas volume scheduling and crash prevention.
- Streamlining manual PO closures for improved efficiency.
- Automating Post Order Management and shipment confirmations.

Solution:

Negative Suspense Invoicing Bot

- Extracted company data from Excel attachments via email.
- Downloaded the "Suspense Detail by Owner" report and updated suspense codes in the QDOD system.
- Entered data into PeopleSoft templates to generate Negative Suspense Invoices.
- Adjusted negative values through manual entry in QDOD and monitored invoice status for payment.
- Removed suspense codes from QDOD upon payment confirmation.

Allegro Wall-E Bot

- Reallocated unpatched gas volumes for 75+ pipe plants and ensured pipeline contract balances were zero.
- Enhanced Allegro's performance and integrated updates with the dashboard.
- Created ServiceNow tickets and handled unresponsive Allegro systems when necessary

PO Line Closure Automation

- Automated the closure of POs over 90 days past due and still open.
- Implemented a functional flowchart for process clarity and ensured timely closure to streamline procurement operations.

Post Order Management Automation

- Automated supplier communication via email, saving hours of manual effort.
- Accelerated closure of outdated POs with two key processes:
 1. Post Order Acknowledgement
 - Ensured Promise Ship Date updates in the client's system by following up with suppliers.
 - Escalated to buyers if suppliers failed to respond within 72 hours.
 2. Shipment Confirmation
 - Requested shipment details from suppliers via email on the Promise Ship Date.
 - Notified requesters and escalated to buyers if suppliers failed to provide updates within 72 hours.

Business Benefit:

Implementing the RPA Bot resulted in up to 95% process completion accuracy, ensuring minimal errors and greater reliability in operations. Efforts were reduced by approximately 70%, leading to a significant reduction in manual workload. Additionally, process efficiency improved with time savings of up to 60%, optimizing overall performance. The automation also reduced daily purchase orders from 50 to just 2, enabling the handling of over 1,000+ invoices/POs per day with ease.

Key Stakeholders:

- Client's IT Department
- Bot Developers
- Engineers
- Quality Assurance Team
- Project Management Team
- End Users of the Bots



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