



S U C C E S S S T O R Y

## Driving Change Through Automation

### Background

This project was done for a large automotive business that has multiple divisions and several brands. Because they are committed to enhancing their customer service they introduced SynerAutomate into the business to automate purchasing and fleet maintenance processes.

### Purchasing Challenges

This business purchases parts from several suppliers for the fitment centres in their retail division. Orders that come in from the point of sale systems at the fitment centres are collated. Then the procurement department creates purchase orders to send to suppliers.

Before the implementation of SynergAutomate, the procurement team was required to capture a PO, email the order to the supplier, and then follow up with phone calls or further emails to find out the latest stock and delivery information.

Location  
**South Africa**

Industry  
**Automotive**

Solutions  
**Sage X3 ERP**  
**SynergAutomate**

Partner  
**SynergERP**

## SynergAutomate Gets the Purchasing Wheels Turning

SynergAutomate was introduced to automate the following steps which manage the sending of purchase orders to suppliers and receiving of information on the dispatch of stock. The integration service in SynergAutomate facilitates the following process:



The purchase order is sent to the supplier



The send status indicator is saved on the purchase order in the ERP. This includes initial call response success or failure and whether items are shipped on the purchase order



At preset intervals the Sage ERP system will request dispatch information from the supplier. Their system responds with the relevant details



The integration service creates a full audit report for this purchase order process

The integration services in SynergAutomate enable rapid addition of integration points known as APIs (Application Programming Interfaces), a software intermediary that allows two applications to talk to each other. These interfaces may be provided by other systems or created using the SynergAutomate platform.

The automotive business that initiated this project captures 2000+ purchase orders per month, so by automating their ordering process with SynergAutomate they freed up the procurement department to focus on more strategic decision-making.

This automated process also provides stockholding and ETA information in the system enabling the fitment centres to provide accurate information to customers. The result - a better customer experience.



## Fleet Approvals gets the Green Light

This automotive group provides fleet customers with access to a nationwide network of automotive fitment centres to ensure the hassle-free maintenance of their fleets.

There is a pre-approval process conducted through Standard Bank. Jobs are pre-approved by the bank based on the agreement the fleet customer has with the bank. If the quoted job falls within the fleet agreement then approval is granted immediately. If a job is declined, then based on the reason for the decline the job can be amended and resubmitted for approval.

Prior to the automation of this process the salesperson would phone the bank call centre to get approval before the order could be created and the work started.

### How is this approval process automated?

An integration layer, provided by SynergAutomate, interfaces with the bank API. The integration layer is a cloud-based system that serves as the only communication point to the bank. All of the fitment centres communications with the bank are directed through this integration layer.

Bank authorisations are done based on a quote created in the point of sale (POS) system. The first part of the automation process saves the quote in the Sage ERP. Once a Sage generated quote number has been created the bank authorisation process is initiated.

When results of the approval request are received from the bank the corresponding quotes will be updated in Sage ERP with the last status. The processing of the work in the POS will then proceed based on the most recent approval status.

So, with these automations, employees now spend less time on the phone getting approvals and customers experience a more efficient service.



### Automation Benefits for Procurement

- Less time spent on a manual purchasing and follow-up processes
- Less employee intervention results in less errors
- Full audit trail on purchase and delivery process
- Dashboards to monitor real-time progress of purchase orders
- An automated purchasing process provides better stock information for dealers and results in improved customer service



### Automation Benefits for Fleet Approvals

- Fitment centre employees no longer need to call the bank's call centre to get approvals
- Full audit trail on approval process
- A streamlined approval process results in a better customer experience for fleet customers