Synoptek

Case Study

Robotic Process Automation Accelerates Invoicing and Shipment for a Logistics Provider

Customer Overview

Customer

A logistics solution provider

Profile

The client provides logistics solutions to freight forwarders and customers in a variety of industries across the United States

Industry

Logistics and Supply Chain

Services

Robotic Process Automation

Business Need

The logistics company used EDI to exchange information on loads as well as shipment status with their customers. They sent EDI 214's and EDI 204's through their Transport Management System to the customer EDI portal which mainly included load tenders and shipment status update. However, because automation was non-existent, they had to manually update each load with accounting details on the customer portal. As shipments started increasing, this manual process became extremely time consuming.

They also used hybrid technology and various third party integrations to run their growing business. To manage IT support issues and queries coming in from users, the logistics company created a support dashboard on Azure DevOps which manages the support requests and helps to keep track on it.

To overcome the manual process of updating load on the customer EDI portal, increase overall productivity, reduce time, as well as automate incoming IT support requests and queries, the logistics company wanted to implement RPA bots with the ability to create a flow that allow users to track and send updates and reminders. The company also wanted bots to streamline the license management process.

Since Synoptek has a long-standing relation with the logistics company, having provided several IT services in the past, they reached out again to meet their RPA requirement.

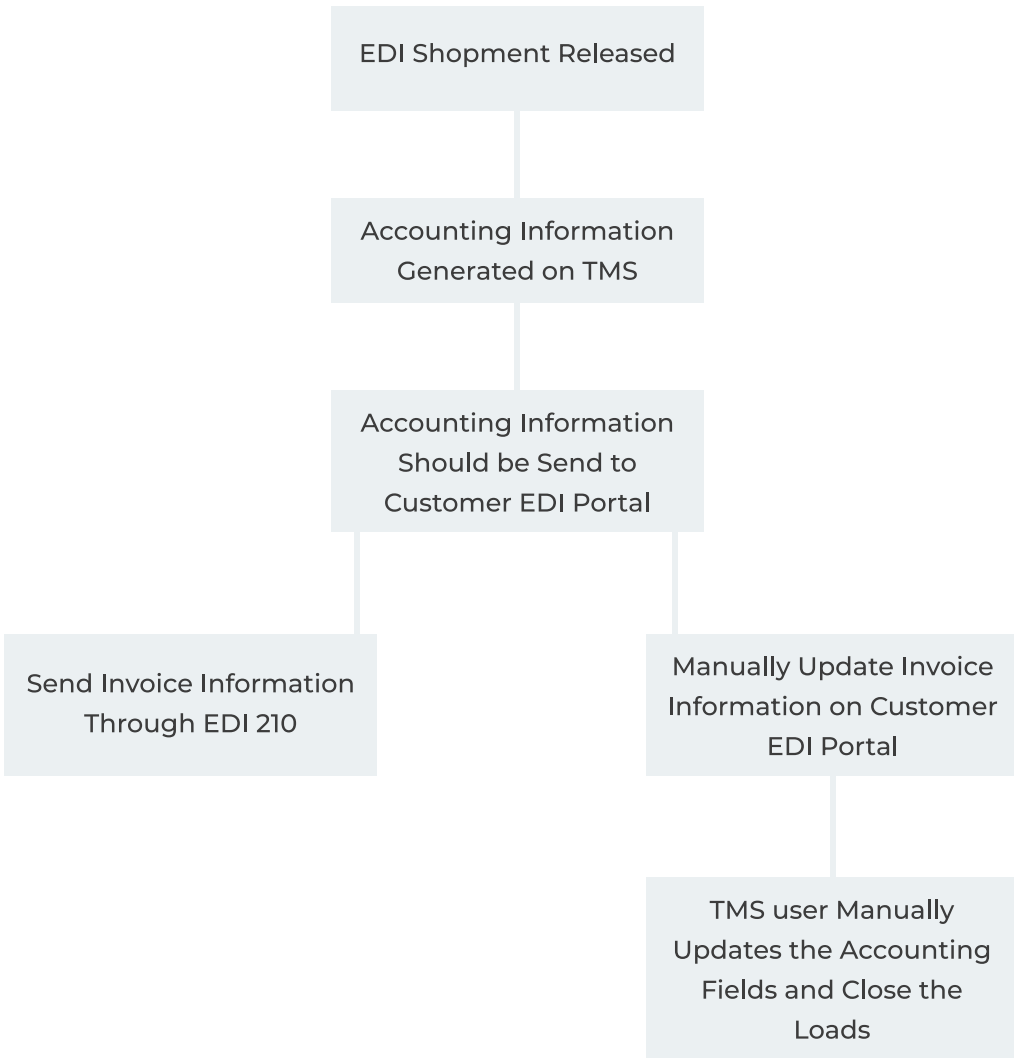
Approach and Solution

To meet the logistic company's requirement, Synoptek provided several RPA services.

IT Assessment Services

To overcome the manual process of load updating on customer EDI portal, Synotpek developed a BlujayBot that carries out the following tasks:

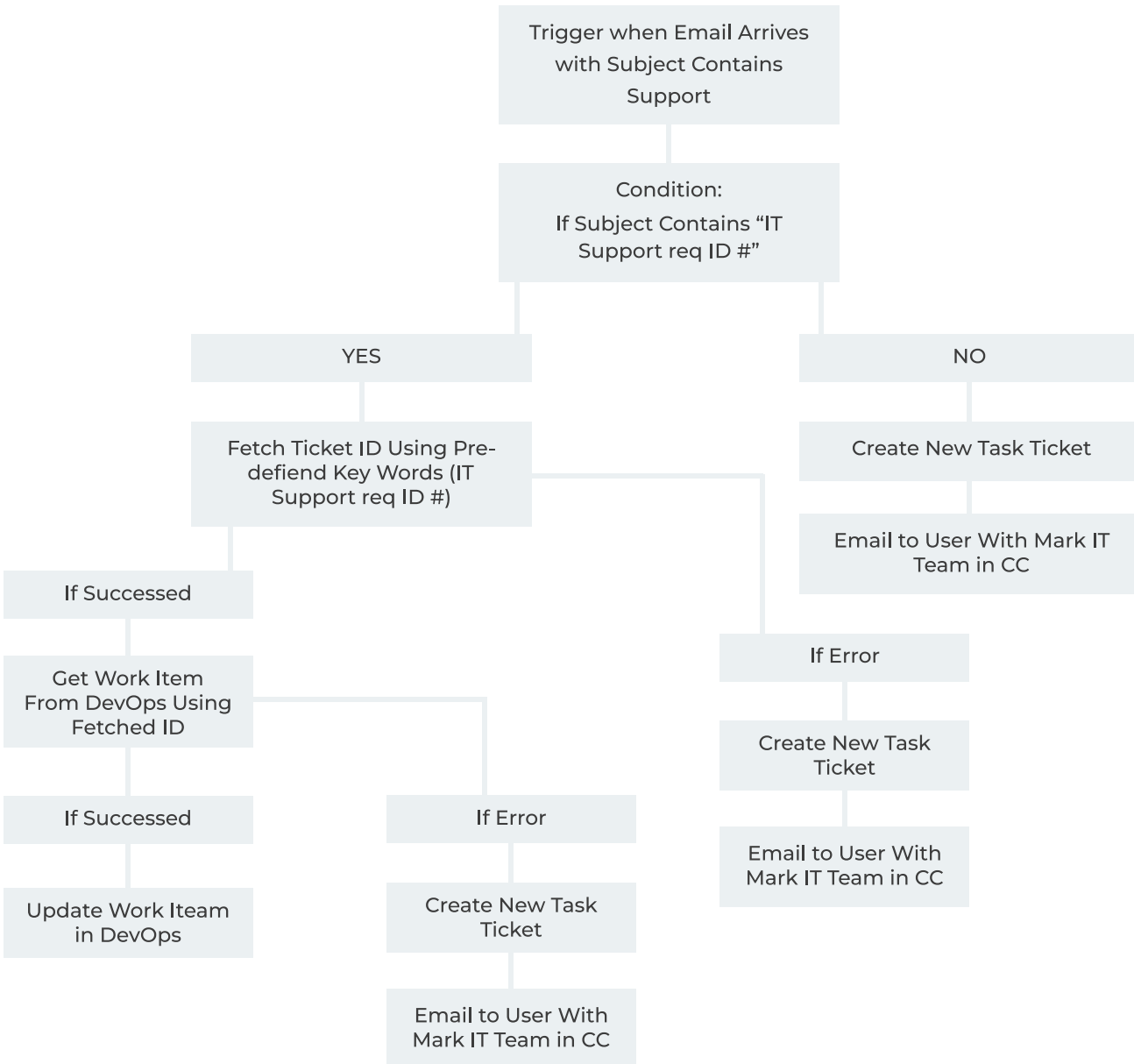
- Extracting files from TMS in Excel format and processing only those loads whose shipment status is RELEASE
- Mapping required TMS fields with BluJay fields under close loads tab and populating all fields after mapping the shipment ID with PRO#
- Skipping shipments, IDs of which have not been found on BluJay and continuing the mapping process for other loads
- Saving populated details on the BluJay portal and closing the load accordingly



Support Request Process Automation

As part of Phase I of the project, Synoptek used the Power Automate workflow to create and track incoming support request. To automate the approach, a “SupportBOT” was introduced which performs a string of actions through predefined steps. These include:

- Checking the subject line of support request emails received and searching for the keyword “Support” and ignoring the email if the keyword is not found
- Creating a new work item with a unique ID in the support tile under Azure DevOps
- Sending an acknowledgement email to users who raise the support request (as well as to all stakeholders) with unique ticket ID in the subject line
- Adding all user updates under the same ticket ID on the DevOps dashboard



In Phase II, we built additional features, as required by the client, to enhance the performance of the SupportBot. These include:

- Sending email alerts to stakeholders when a ticket is resolved or marked closed, a work item is unattended for 24 hours on the dashboard, or if ticket is unattended in the last 3 days
- Reading emails coming from employees and creating new work items – even if the “Support” word is not mentioned in the subject line
- Moving assigned tickets to TMS support bucket from IT support bucket on dashboard
- Creating new tickets on the support board and assigning it to TMS
- Notifying users via email when a ticket is closed/resolved by TMS support

License Management

To streamline the license management process, Synoptek developed another bot to manage Microsoft 365 licenses including E1, E3, E5, and F1 with the following capabilities:

- Running every Friday on scheduled time or as and when required to extract user details such as OneDrive usage, mailbox usage, and email activity from the Microsoft 365 Admin Center
- Identifying existing assigned licenses for each user and determining if there is a need to upgrade or downgrade the license of any user based on defined criteria
- Providing a consolidated report with upgrade or downgrade instruction required against each user and sending an email to the Admin
- Performing the appropriate license-related modification for affected users, on review and approval of the request

Business Benefits

With Synoptek's implementation of the RPA bots, the logistics company can enhance the productivity of employees, reduce the chances of error, as well as improve several aspects of business including:

- Accelerating the load closing process
- Automating incoming IT support requests and queries
- Tracking requests and sending updates and reminders to users
- Improving the ability to handle the growing volume of shipments
- Enhancing the license management process

RPA bot reduced time to upload 100+ invoices

from **3 hours** To **30 min**

with 99% accuracy

"Overall, this has been a very successful partnership and very effective business relationship; it has given us a platform and the IP for integrated business operation that will allow us to be nimble, agile and competitive in the rapidly evolving Logistics industry and propel us to the forefront of technology evolution."

- CIO

About Synoptek

Synoptek delivers accelerated business results through advisory-led, transformative full-life-cycle systems integration and managed services. We partner with organizations worldwide to help them navigate the ever-changing business and technology landscape, build solid foundations for their business, and achieve their business goals.