Transforming Document Processing to Drive Business Growth for Aerospace Manufacturer

Client Overview

A leading manufacturer of positioning and navigation sensors specializes in magnetometer-based technologies for aviation and maritime applications. Recognized for enhancing magnetic navigation for military platforms, the company has secured multiple SBIR contracts, showcasing its innovation in GPS-contested environments. Its advanced sensor solutions, particularly magnetometers, play a crucial role in improving navigation accuracy and reliability. With a strong focus on research and development, the company continues to drive advancements in positioning technology for defence and commercial applications.

Requirements and Challenges

The client faced a critical challenge in managing their purchase order (PO) workflows. Their existing process involved receiving POs through emails and manually updating them into Salesforce. This approach was time-consuming, prone to human error, and inefficient as the business scaled.

Key Challenges:

1. **Syncing Purchase Orders to Salesforce:**
   Automating the transfer of PO data to Salesforce, including the creation of Accounts, Opportunities, Sales Orders, and related line items, presented technical complexities.

2. **Limited Web Automation Options:**
   Web automation wasn't feasible due to the constraints imposed by Two-Factor Authentication (2FA), which required a secure and reliable workaround.

3. **Complexity with Custom Buttons:**
   Although they had implemented custom buttons to streamline some processes, they were insufficient for the required level of automation.

Prowess Provided Solutions & Services

To address these challenges, Prowess designed and implemented a comprehensive solution to automate the synchronization of purchase orders with Salesforce.

- **Automated Purchase Order Integration:** Emails containing purchase orders were processed using MuleSoft's Intelligent Document Processing (IDP) to extract key data points such as customer related details. This information was then mapped to Salesforce objects, including Accounts, Opportunities, Sales Orders, and their respective line items.

- **Streamlined Email Attachment Handling:** The system automated the handling of email attachments, ensuring data accuracy while reducing manual intervention.

- **Technologies Implemented:**
  - **MuleSoft's Robotic Process Automation (RPA):** Automated repetitive tasks like email parsing and Salesforce updates.
  - **MuleSoft's Intelligent Document Processing (IDP):** Used advanced data extraction techniques for purchase order information.
  - **Python Scripts:** Custom scripts for business logic and data transformation to ensure seamless integration.

At a Glance

Industry - Manufacturing

Challenge - Manual processing of purchase orders via email, requiring automation to sync data with Salesforce while overcoming 2FA limitations.

Solution - Automated purchase order processing using RPA, IDP, and Python scripts, enabling seamless data sync with Salesforce for Accounts, Opportunities, and Sales Orders.

Key Highlights

70% reduction in order processing time

90% reduction in data entry errors

Future-ready and greater scalability

Methodology and Process Followed

1. **In-depth Research :**
   Before initiating development, the team conducted thorough research on the client's existing Salesforce configuration, including custom packages, objects, and workflows. This ensured that the solution aligned with their business requirements and technical ecosystem.

2. **Collaborative Design:**
   Prowess worked closely with the client to define the automation workflow, mapping the PO data fields to Salesforce objects while considering all edge cases.

3. **Iterative Development:**
   The solution was built and tested incrementally to address challenges such as API limitations and business-specific customization requirements.

4. **Deployment and Testing:**
   The final solution was deployed in the client's CRM environment and rigorously tested to validate accuracy and reliability.

Value Delivered by Prowess

With this solution, Prowess brought noticeable improvements to the client's daily operations.

- **Saving Time and Effort:**
  The manual work of entering purchase orders is now a thing of the past. The automated system cut processing time by over 70%, allowing the team to focus on higher-priority tasks that drive business growth.

- **Fewer Errors, Better Data:**
  By automating updates, the system reduced data entry errors by more than 90%, ensuring Salesforce records are accurate, consistent, and always ready for use.

- **Built for Growth:**
  The solution wasn't just about solving today's problems—it's ready to handle tomorrow's challenges. The API-driven design ensures the system can grow and adapt as the business scales.

Prowess turned a complicated, time-consuming process into a smooth, reliable workflow, by using technologies like IDP and RPA, alongside custom Python scripts. This gave the client more time and energy to focus on what they do best: creating game-changing digital marketing campaigns for their customers.

For further information, please contact:

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