Module 2: Overview of UiPath

Case Study

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Case Study

Purchase Order Management

Customers of a computer hardware Company, Renovo, place their purchase orders by submitting a Purchase Order (PO) in a PDF or an Excel file through emails to their sales representatives. Sales representatives on receiving POs in their email enter orders in the Company's Sales Order Management module of their SAP ERP system. Sales Orders then move to Contract Management department of the company for approval. If a Sales Order meets the contract's standard terms with the customer, then the Sales Order is approved, and the Sales Order moves to the Packaging and Delivery department for delivery to the customer. In case the Sales Order does not meet the contract's standard terms, then the contract management personnel raises an escalation and the Sales Order moves to the Legal department for review and approval. Depending on the variances in the Sales Order from the standard terms and approval authorization limits, the Legal Personnel may either approve or reject the Order. In case the Order is rejected, it sends a rejection notification to the Contact Management Personnel as well as the Sales Representative. Packaging and Delivery department will send the items to the customer as per the approved orders.

Renovo receives hundreds and sometimes thousands of such orders from their customers daily. Existing Purchase Order Management system involves many people from many departments (Sales, Contracts, Legal, Packaging & Delivery) involving various applications/systems (Email/PDF, OMS, ERP, Departmental Applications). This leads to a long delivery time and that too is inconsistent across orders and customers. Also, it is error prone due to manual data entry and it often leads to incorrect dispatches causing losses and customer dissatisfaction. To solve this problem, Renovo wants to implement an automation system using Robotic Process Automation to automate the manual interactions with their existing applications.

Help the company by simply creating an automation workflow layout using UiPath that would make a high-level automation design. Please note that the scope of the current solution is just to create the high-level workflow model without actual application automations and business logic implementation. Following assumptions should be made:

- Simply model the Business Process Workflow
- No business logic needs to be implemented right now
- No business applications automations need to be created