Purchase Order Management Made Easy

Tracking Purchase Order statuses and managing the corresponding documents can be overwhelming and difficult to audit. Data Pros' client, a world-famous heavy-duty equipment manufacturer, has over 30 branches that span around the world. Each branch deals with vendors and suppliers that send multiple PO's a week to our customer. Before Purchase Order Management Made Easy (PO-MME) was put into production, the only way to track PO statuses was via email and saving multiple versions of the PO. With PO-MME, our customer has an automated solution that tracks each PO from start to finish.

AT A GLANCE

Customer: Equipment Manufacturer

Customer Size: 125

Country: USA & China

Products and Services: Microsoft Teams, PowerAutomate, SharePoint, Outlook

Data Pros & Purchase Order Management Made Easy

Customer Challenges

Our customer is a famous heavy-duty equipment manufacturer and has been maintaining competitive advantages in different fields such as port machinery, marine engineering, heavy and special steel structures, offshore transportation, etc. With over 30 branches, they were having difficulty keeping up with vendor and supplier purchase orders. Since there was no formal system in place, PO's were starting to get lost in employees Outlook mailboxes and they were having a difficult time tracking the statuses of their PO's.

Data Pros was tagged in to build a solution that would streamline the approval process and management of their purchase orders. They needed to understand which PO's were sent for approval, which PO's needed to be adjusted, and which PO's were rejected. By utilizing their existing Microsoft investment, Data Pros was able to implement Purchase Order Management Made Easy, also known as PO-MME.

Partner Solution

Data Pros architected a solution by integrating Microsoft Teams, SharePoint, and PowerAutomate. The purchase order process begins in SharePoint and ends in SAP, but the magic is what takes place in the middle.

Project managers would kick the process off by uploading a PO into SharePoint. Once the PO is properly meta-tagged it is sent to the approvers via Microsoft Teams. The approvers receive the document via the Teams Approval App and can either accept or reject the PO directly via Teams. With this workflow in place, PO's either wind up in an "approved" SharePoint folder which sends them directly into SAP, or in the "rejections" folder where they are edited and resubmitted. With meta-tagging and alerting the PO's can easily be traced within SharePoint or Teams.

Customer Benefits

Our customer couldn't believe they waited so long to implement Purchase Order Management Made Easy. It saved them countless hours of manual auditing and helped streamline their projects. Not only did it save them time, but it saved them money and allowed for them to take full advantage of the Microsoft Licensing they were already paying for. With PO-MME our customer is processing more orders and strengthening business relationships with vendors.

"Once implementing Purchase Order Management Made Easy, it was like night and day. I normally spent over 6 hours a week tracking down purchase orders... now, it takes less than 15 minutes."

- Controller

"We are always looking to increase efficiency. We identified lag time within our PO management process and immediately went to Data Pros. With PO-MME we know that status every PO and can make more calculated business decisions"

- Chief Financial Officer

"When on jobsites it has become very easy to send and approve PO's right from my phone. With the ability to digitally sign, I do not need to wait until I am in the office to send off PO approvals anymore"

- Project Manager