

Taking Business Efficiency a Notch Higher: **100 Processes to Automate for your AS400/IBMi-based ERP System**



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Jogging the Memory: The Whats and Whys

How old is your AS400/IBM iSeries - based ERP? Was it built from the ground up or did you go about doing elaborate research on the then available off-the-shelf options before zeroing in on it? What was your reason to prefer it over the rest? Was it the closed AS400/IBM i ecosystem comprising the software, hardware, coding language, and database, which imply reduced complexities and dependence on other elements? Or were you convinced by its widely acknowledged reliability and the in-built capability to nail mission-critical tasks?



A Few Assumptions (Rather Observations)

Over the years, enterprise technologies have leaped light-years ahead, riding on the digital adrenaline. While the size of hardware has reduced, their agility and capability have breached the thresholds of imagination. Cloud storage revolutionized the way enterprises and individuals stored, retrieved, and protected data, and the infusion of Artificial Intelligence reduced human intervention in critical processes.

However, with all the revolutions and evolutions in the computing space and the availability of tempting options that dwarf the capability of legacy solutions, you chose to stick to your old warhorse to fight modern business complexities.

Is there a method to the madness? Not shying away from a wild guess.

- ▶ **There isn't a real need** – Your old system is serving you right. You don't want to fix what isn't broken.
- ▶ **Legacy data hosted by the system** – Rendering system migration unimaginably difficult.
- ▶ **People and processes** – Your team has been trained and workflows have been designed to fit the old machine.
- ▶ **The resources quotient** – System migration involves high costs, time, and inconveniences.
- ▶ **A hesitant team** – Either the decision-makers or the end-users (or both) resist such a change.
- ▶ **Psychological barriers** – Is the risk worth it? Will the new environment deliver? Uncertain!
- ▶ **Who will do it?** – Migration is an alien concept for your in-house RPG team. But you also doubt the ones who can do it.
- ▶ **Years of changes** - The system has undergone massive changes over time, making it difficult to replicate those in another environment.
- ▶ **Lack of documentation** – Often, enterprises on iSeries lack adequate documentation of the system, making migration excessively laborious.

So you have decided that come what may, your operations will continue to be propelled by the same ERP that's been doing the job for years now. And why not? AS400/IBM i still scores high when the round-table discussion is on leading enterprise machines today. The concept, the design, and the upgrades and enhancements have been such that AS400/IBM i is still the preferred choice for many when the question is about reliability and sturdiness. So are its flashy modern alternatives getting a run for their money? You bet!

What's Causing the Pain if it's all Hunky-Dory with your AS400/IBM i ERP?

They say nothing is perfect, not even nature. AS400/ iSeries has its share of shortcomings, weaknesses, and vulnerabilities that you, as a sworn user, are aware of. And when pitted against today's options, its weaknesses are more pronounced. One such perennial pain point of the system is the involvement of a large number of manual inputs that invariably cause inefficiencies. For instance, manual keying and handling of data is not just tedious and time-consuming but also error-prone, which can lead to faulty inferences and decisions. Manual processes also demand extensive human intervention, implying increased costs. Furthermore, manual data analysis and business reporting often carry serious threats of misinformation, which can translate into grave consequences for the business.

What is the Need for Automation in an ERP?

The need for automation is underscored by the very purpose of implementing ERP software – convenience and economics while managing workflows. As a relatively aged software, your AS400/IBM i-based ERP has an inherent shortcoming in the form of manual processes. At a time when the world is touching unprecedented levels of efficiency, your ERP, since originating in days before automation became a craze, requires substantive manual intervention, making its functioning resource-hungry and error-prone

With digitalization making inroads in enterprises in the form of AI, ML, cloud, and the like, you can't afford to operate in isolation and miss the boat while your competitors zoom ahead with the digital propulsion. What was earlier heralded as a complex infrastructure requiring internal technical teams to manage can slowly unfold into a hassle-free automated system that hardly requires any expert's service.

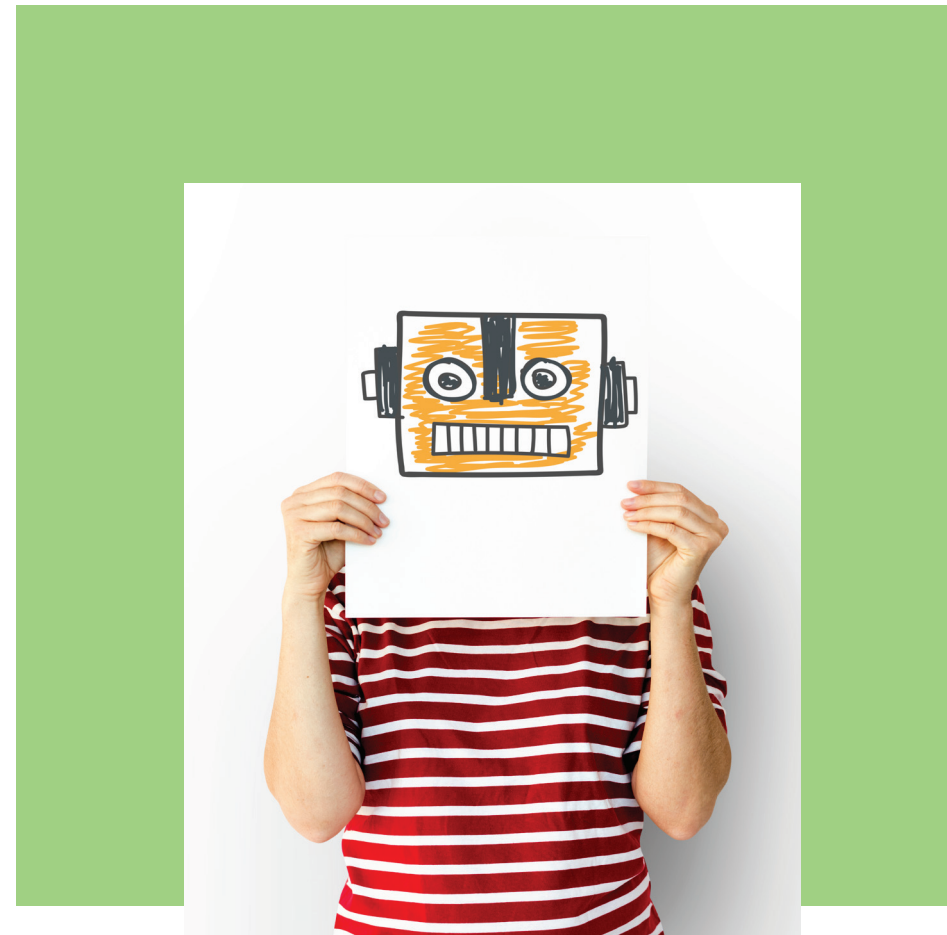
The good news is that Robotic Process Automation can bridge the gap between your legacy ERP processes and modern automation. With RPA injected into the system, integrating information and breaking down data silos existing within your organization is easy, which leads to faster processes.

Robotic Process Automation: A Quick Glance

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Which Processes Stand as Automation Candidates?

RPA finds the scope of implementation in almost every aspect of a modern business across industries. Manufacturing, inventory, supply chain, customer service, accounts and finance, internal IT service, vendor management, and sales are just a few of the areas with a high number of tasks for automation. Below is a detailed list of use cases of RPA in multiple industries/processes; you can refer to the ones closely matching your business needs. That would give you an accurate idea of how the technology can transform business workflows to deliver higher efficiency, lower costs, and happier stakeholders.

Supply Chain Management

Order processing

Whenever a manual order is registered in the ERP, RPA logs into the system, identifies the order by its number, accesses it, downloads the details, and sends it to the order fulfillment team. Bots can be used to share updated stock data pertaining to orders and the approximate wait time if the item is not ready for shipping.

Transportation and shipping

For load pickup requests received via emails or TMS, bots access the mail and extract shipment details, log the job in the scheduling system, retrieve the available load information, and pick the best load. The pickup details are shared in the customer and carrier portals. The driver of the vehicle gets a notification about the schedule/location of the shipment.



Reverse logistics

Once a request for the return of an item is received, bots notify the logistics team about the same. If the request is approved, RPA is triggered to log in to the order history, extract the order details, and enter those in the pickup scheduling system. Bots share the shipment pickup details with the vehicle driver and send the driver details to the requestor. Status about successful pickups, delays, and failures are shared with both the logistics team and requestor.

Supplier management

Bots can send out emails to suppliers at regular intervals, asking them to update or confirm their information and share their insurance and other certificates. Bots can also be used to send out tenders and record the response of the vendor. Bots can be used with e-signatures to automate the contract signing procedure for supplier onboarding,

Asset management

Bots can be integrated with mobile-devices to capture asset tagging and audit. Bots can read digital copies of purchases and enter information such as asset model, serial number, and equipment number for easy identification of assets even in vendor location to facilitate timely asset management. RPA can run scripts for automated reconciliation of assets and discrepancies and store and retrieve information about asset audits.

Forecasting

Bots integrated with machine intelligence can source historical sales data from the database, copy it to a spreadsheet, and process for statistical forecasting. Likewise, RPA can log in to the customer, supplier, distributor, and manufacturer portals, access the pre-defined columns, and sort and filter the available data for predicting upcoming demands.

Material procurement

For all consignments received in the plant, an OCR solution can be used to capture images of the pallet table on the cartons. The image is then translated into data pertaining to product number, quantity, brand, and others. Bots can update the inventory tables with this data, notify the team about the same, and can even validate the data.

Warehouse stock reconciliation

RPA logs in to the inventory portal to extract the actual stock numbers from the warehouse team and enter the figure in a spreadsheet. RPA bots then extract the recorded stock figure from the ERP and compare both the numbers for reconciliation. The result is sent to the supervisor for validation through an email.

Productivity assessment

Bots can be used to collect productivity data of employees and also that of machines and organize it in spreadsheets. Further details such as work hours, operational expenses, employee salary, etc. can be used for detailed reporting on employee productivity. RPA can process the data as per pre-defined rules and present the performance scenario and hidden data insights in the form of graphs, charts, numbers, and others.

Fuel costs

The bot begins by scraping the diesel prices from the official website(s), logs into ERP, and sets up appropriate fuel-surcharge accessorial for different carrier rates as per the latest fuel prices. The RPA bot then sends an automated email to the concerned individuals to intimate them about the process's success or errors.

Inventory



Critical alerts

Bots can keep a tab on the changing stock levels, and alert managers when stocks deplete below a certain limit. RPA can even send alerts to the suppliers for the depleting items so that they can start preparation for fulfilling the upcoming order for the client. Alerts can also be configured for unexpected sales spikes (velocity alerts). Bots with intelligence can predict well in advance when to expect stockouts based on the current order rate.

Vendor validation

Bots can send requests for quotations and other documents to vendors via emails and send back them up with timely reminders. On receiving the required information, RPA can verify vendor records for completion and accuracy, and ascertain their capability from the past data. Bots can compare multiple vendors based on their price, quality, waiting time, etc.

Stock segregation

RPA with OCR can be used to scan product barcodes and use the information to find their precise location in the warehouse. RPA bots can drill down warehouse data to identify stocks by their date of arrival, supplier, and dispatch priority.

Reports and audits

Bots can automatically access the stock levels of each item from the ERP and arrange the data in the required reporting and auditing format. Bots can use the data to identify critical parameters such as stock wastage, stockouts, etc.

Inventory forecasting

Bots can be used to process data about product seasonality, lifespan, and past trends to predict future demands to maintain optimum stock levels. Users can also analyze multiple scenarios such as availability of packing material, safety stock, etc. for any product or consignment using RPA.

Multi-location inventory

For organizations with multiple warehouses, bots can gather inventory data from each location, consolidate the information, and share it with all stakeholders across the organization. Users can integrate RPA with interactive dashboards to keep track of key metrics to monitor rapidly moving stocks.

Item catalog

RPA monitors emails requesting the inventory department to either update or create a new item in the master datasheet. Bots analyze such messages for details such as the item name, category, shelf life, storage quantity, SKU number, etc. RPA then sends an acknowledgment mail to the sender, updates the master data with the new product details, and sends an email notification about the success status.

Dropshipping

For connecting a warehouse to multiple retailers and share real-time stock data and product prices with them, RPA is the go-to solution. When an order for a drop-ship product is placed, bots send the order details to the order-fulfillment team over an email. Bots can be trained to share the estimated delivery time and other relevant details with the retailer.

Cycle count

To make it easy for the concerned individuals, bots can access the entire transaction history and update the data entry on all inventory transactions. For any differences found during the count, bots can reconcile the data with the information in the inventory master sheet. Bots can also be trained to identify error patterns and send automatic prompts for items to be counted and the counting policies or procedures. RPA can also be used to make changes in the inventory database to reflect the actual stock on the shelf.

Backorders

Whenever an order for an out-of-stock item is placed by the customer, bots open a backorder for that ordered item, convert the backorder into a PO, and send the PO to the vendor. The RPA bots keep track of the vendor's response on the order status, delivery date, etc., and updates the same in the ERP.

Customer preferences

Bots can dig into the customer database to extract data about a particular client or customer, filter the relevant information, and apply processing rules to draw insights into their preferences, based on previous orders. In the same vein, the sales team can also use RPA to get relevant suggestions and verify product pitching plans (with exceptions) to predict the conversion rate.

Quote generation

As a customer/salesperson add specific details about a product for which they need a quotation in the product portal, bots use that information to search the product catalog with the product number, quantity, availability, price, etc. RPA then compiles the retrieved information and shares it with the stakeholders over an email. As bots allow the user to change the price-determining variables, the latter gets the flexibility to define customer-specific prices.

Target setting for executives

RPA can be used for performance evaluation and setting sales and revenue targets. RPA can access past data for sales information of individuals and teams in terms of quantity, order value, region, and other parameters. This data is then subjected to pre-defined rules to set realistic, data-backed targets for the future.

Opportunity management

Lead data can be automatically segregated and saved in the database using bots. RPA can be used to assign leads to salespersons and set auto-alerts for follow-ups, meetings, and sending proposals. Bots can be configured to apply logic such as if-else, to identify opportunities with the highest likelihood of conversion. They save on the time and effort of executives by tracking deal status (on ERP), conversion rates, and other critical variables.

Sales forecast

Bots can dig into the historical sales data (previous week, month, year, etc.) and apply formatting rules to project upcoming sales figures. The specific information that bots consider to estimate the figure can include product name, quantity sold, current and previous prices, discount history, customer details, etc. Bots integrated with intelligence can also analyze real-time sales data and ongoing sales activities to predict the chances of success and suggest data-driven improvement measures.

Capturing inquiries

Whenever a customer initiates an inquiry about a product on the product portal, bots shoot a series of relevant, pre-framed questions in succession, each determined by the prospect's response to the previous question. The data is then sent to the sales department as a lead. For anomalies, bots triage the case to a human agent based on their availability and specialization.

Integration with CRM

A customer relationship management solution hosts all information about the customers of an organization. Robotic Process Automation ensures that bots be programmed to log into the CRM solution, access specific customer details, and update the same in other systems such as spreadsheets, ERP, reporting templates, etc. This results in massive time saving for the sales executives"

Contract handling

Bots can make contract signing easy with an e-signature feature. For assistance in contract preparation, bots can access contract templates and personalize those with the necessary changes such as party names, address, product details, etc. Digitally signed templates can be validated with a one-time password and the same can be stored and retrieved when needed.

Sales

Maintaining customer database

For those tedious customer data updates in the database, bots can be configured to copy data directly to the data table from any spreadsheet, server, or any digital platform as per the configuration rule. In that rare case of failure, the concerned individuals/teams are notified about the same.

Sales data security

Bots can be used to authenticate attempts to access critical sales information in the ERP. RPA can be configured for username-password verification or multi-tiered evidence-based validation to prevent unauthorized access to data.



Manufacturing



Equipment and factory inspection

Reading of data and scanning images about the functioning of processes and equipment can be automated using bots. For ERP, RPA can be used to trigger approval and task assignment processes, and generate detailed work orders for technicians.

Onboarding new suppliers

RPA extends online forms to suppliers to furnish their details and establish their accounts. Bots can keep track of all digital communications, including the execution of account contracts. RPA can be configured to review applications for their accuracy and completion and notify the sender in case of any discrepancy.

Equipment service

Service technicians can better manage and track their documents and processes with the help of RPA. Bots can log into the service master sheet to collect data to generate work orders, equipment service reports, return authorizations, etc. with all mission-critical details and send them for approvals.

Integration with PLC

Bots can analyze data sent out by the PLC to check for errors in machines. Sufficiently trained bots can crawl even bulk data to determine machine efficiency, estimated time of production, and shipping timelines, among others. Intuitive bots can present this information in the form of reports on dashboards.

Material PO

Bots can download new quote documents from incoming emails. The documents are then sorted for processing, where a bot extracts the quotation data into a structured CSV format. Bots then log into the ERP and use the formatted data to enter the required information for the PO. The generated POs are then sent to the concerned department for approval through emails.

Labor and time tracking

Bots can keep track of the number of individuals engaged in an activity along with the time spent. RPA can access the ERP to verify if work rosters are actually being adhered to by the employees and send notifications to flag violations.

Barcoding

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Job Tracking System

RPA can log into disparate job tracking systems engaged in the production line, unify and consolidate the data from different systems, and share it with the manufacturing unit for better visibility in the workflow.

Goods inspection

Data regarding gas, solid and hazardous waste, etc. is collected and sent into the manufacturing system module in ERP. Bots log into the ERP and pull up maps, access relevant images, and make annotations on images before uploading them. RPA can be used to prioritize inspectors' schedules by using appropriate algorithms for identifying sites with the highest risk for regulatory non-compliance.

Bid management

RPA can be used to streamline bid data from multiple bidders from the portal. On the receipt of a bid, bots send an acknowledgment to the bidder. The data is then arranged in a spreadsheet and sorted as per the requirement. Bots then send emails to the concerned department mentioning critical data such as the highest/lowest bidder, bidder details, etc.

Project Management



Project scope

RPA can be used to collect relevant project information from stakeholders, project sponsors, and the internet. Bots can be trained to assist in determining project deliverables by facilitating inputs from all stakeholders. Based on the data analyzing capability of bots, they can be used to define project milestones and phases.

Workforce management:

Bots integrated with an automated work scheduler can be deployed to create rosters for project teams. RPA can export the created schedules to the configured format (Excel, PDF, and HTML), and email the schedules to the concerned team members. Bots can also monitor the adherence to project schedules by comparing the actual attendance of the team members with their schedules.

Budgeting

Bots can extract relevant budget data from the historical data of previous, similar projects and transform it into the required format. They can drill down into the data by factoring in current relevant dynamics such as inflation and additional expenses to help users with accurate project budgeting.

Capacity Planning

RPA can be used for ascertaining the capacity of the project team by empirically evaluating the skills and expertise of the members and the tools they possess. For instance, bots could be used to match the professional expertise of each member to the combined effort required in a project, giving an objective view of the team's preparedness for the undertaking.

Project Collaboration

An RPA services provider can help enterprises auto-schedule emails, SMS, and other digital forms of communications to keep the entire team updated and on the same page. RPA can keep a tab on the status of various project parameters, and keep all stakeholders informed in near real-time.

Project Reporting

A competent RPA firm can configure bots with measurable KPIs to access project outputs and assess the quality. RPA can present the same in the ERP's dashboard in the form of graphs, charts, tables, and other visual elements. If any component of the output data doesn't fall within a predefined window, bots can send an immediate notification to the concerned teams.

File Sharing

Automation can ensure seamless and safe access to project documents for team members. RPA can keep track of document versions and intimate the viewer if they are accessing an older version of a document. Bots can also be used to give controlled access to documents, including viewing and editing, by verifying the user credentials.

Project Duration Estimation

Bots can access critical project data such as the number of individuals involved, the average output of each individual, leaves and holidays, and other project details, and calculate the project duration. By changing the project variables, managers can forecast all possible outcomes of the project.

Billing and Quoting

Bots can be used to track and make the required adjustments to project billing for any new resource added to the project. Bots access the HR portal to retrieve the details of the new member, make the necessary changes and additions to all relevant templates, and send a notification to the stakeholders once the task is completed.

Workflow Monitoring

By configuring RPA with business flow rules, bots can be leveraged to monitor processes, sub-processes, and workflows and auto-detect anomalies when they occur. Bots can be used to self-diagnose process roadblocks and alert concerned members on detecting one. Notifications are also sent for exceptions that cannot be detected and confirmed.



Marketing

Validating/Updating Customer Info

Bots can be used to review the contact details of incoming correspondence from customers. For that, bots would access the customer database and use it as a reference to check if the incoming emails from existing customers contain any change in their contact details. For any change or addition in details, bots update the database and send a notification for the same to the concerned team.

Segregating Customers & Prospects

Accessing the customer/lead database and segregating customers as per gender, age group, income level, product preference, etc. are ideal RPA functions. Bots can be configured to send marketing and other emails to any of these groups to ensure better engagement.

Social media trends

RPA can extract relevant data about the behavior and preferences of the target base from its engagement with social media platforms. Bots can identify the reason behind a particular post getting more likes and shares as compared to others. The data is then analyzed to draw actionable insights for marketing efforts and can be presented in an interactive dashboard by bots.



Competitor pricing trends monitoring

For accessing competitor websites and extracting the latest information about product prices, new launches and additions, customer reviews, etc., RPA should be preferred. Bots can also be configured to assist in price adjustments as per the market conditions.

Marketing data management

RPA can take over the task of updating voluminous data regarding vendors, clients, and other partners manually. Bots can refer to past campaign data to identify what works and what doesn't while crafting new marketing schemes. They can sift through huge volumes of data to determine campaign goals, ascertain budgets, and identify sales channels that need improvement.

Inbound email management

Bots can be used for daily email reading, email tagging, and distributing them to the responsible company representatives. Bots can recognize and flag emails requiring immediate action (identified by their subject line) and route them to the concerned department with supporting notifications.

Reporting

RPA can extract data from consumer acquisition channels, sort and filter the information, and use reporting templates to build marketing reports. Bots can compile the final report comprising comparison charts, diagrams, and other necessary elements, and automatically send it to the company management.

Lead Management

Bots can extract leads from multiple sources, including social and digital platforms, and facilitate the use of a single repository. RPA can be leveraged to assign weightages to individual parameters such as importance, urgency, and validity. Bots then add up these scores to prioritize the leads and share the same with the marketing and sales department.

Audience response processing

RPA can scan all responses to an email campaign and identify genuine responses. These are then forwarded to the sales team via emails. Also, whenever the prospect engages or responds to an email campaign, bots can send them a suitable canned response as a welcome gesture.

Brand Monitoring

Bots can search through the internet to identify any instance of copyright infringement, counterfeiting, or unauthorized use of intellectual properties. On detecting any such issue, they intimate the legal department of the business along with the details of the violation, helping initiate necessary actions.

Finance and Accounting



Accounts Receivable

Bots create invoices using existing templates and send them for verification. Bots then access the list of recipients to send the invoices followed by payment reminders. Bots can send late payment notices as per the custom schedule of the user. For any paid invoice, RPA marks it as paid in the ERP finance module and sends a payment acknowledgment notification to the payer and the accounts team.

Invoice Processing

Bots identify emails carrying invoices as attachments, extract the attachment data using OCR, and validate it as per the configured rules. If the extracted value passes all validation rules, the invoice is sent for processing, otherwise back to the sender for corrections.

Expense Claims

Whenever an employee fills out and submits an expense claim, the bot sends them an email acknowledgment. It then updates the list item and notifies the site administrator of the change. If the manager approves the claim, the bot forwards it to the finance department. Unapproved claims are sent back to the employee for re-evaluation.

Purchase Order creation

When triggered, the bot reads and validates the spreadsheet with PO creation details, logs in to the ERP, and enters the data into the PO template. Once a PO is created, the bot fetches the PO number and updates the spreadsheet again for reference. The PO is sent to the concerned team for action.

Financial Reporting

Bots access different applications to collect data from income statements, balance sheets, cash flow statements, etc. They then compile the data and feed it to the reporting template to create a financial report, which is then sent to the stakeholder for verification. Approved reports are published by emails while the ones requiring change go to the accounts department.

Recurring Billing

Bots can be configured for all kinds of recurring payment obligations by setting up billing frequencies and entering billing information. Bots send payment intimations to stakeholders at regular intervals, starting a few days before the due date (as configured). RPA generates recurring invoices and sends them for verification to the accounts department; payment invoices are posted to GL.

Purchase

The individual/department enters the item details, vendor information, and quantity needed in the purchase request template. The bot then completes the request form and sends it for approval via email. Approved POs are sent to the vendor and the rejected ones or the ones requiring more details are sent back for rectification.

Tax Management

RPA navigates and logs in to configured online accounts, scrapes tax-related information, and copies it to a spreadsheet. Bots automatically update the HRM and finance applications for any changes in employees' number of deductions, filing status, healthcare benefits, etc., required for tax filing. Bots access each resource individually, compile it, and make it filing-ready, before sending it to the concerned department.

Online Payment Processing

Bots can be integrated with a digital payment gateway and the required digital payment security to initiate and process online payments. Payment details and status are shared both with the sender and the recipient as configured and receipts are updated in the ERP. To avoid any kind of payment discrepancy, bots retain a payment trail for easy reference.

Budgeting & Forecasting

The accounts department can deploy trained bots to evaluate the past expenses and revenue flow to estimate the possible financial scenarios in the upcoming days. Rules-driven RPA bots can segregate expenses by categories and present information in the desired format. Bots also allow users to change the variables of the cash flow to cover all possible outcomes.

Sentiment Analysis

Bots integrated with a Natural Language Processing engine can check customer emails and identify if the customer is 'unhappy'. Such mails are forwarded to the service division for prompt actions. Otherwise, the mail is checked with an intent-matching algorithm to read the customer request and alert the relevant team about it. Furthermore, bots can access audio files of conversations between a customer and the support agent, analyze those to determine the sentiment of the customer, and take corrective actions if there is a problem.

Customer Identification

Bots can load detailed customer profiles from disparate systems by automating application launches, field entries, etc. With bots, updating customer data on multiple systems, such as ERP, CRM, project management tools, and customer engagement portals, can be executed effortlessly.

Customer Service



Email Communication

Bots can use pre-defined templates to craft emails for customer requests, service case status, and service invoices and payments, and share them with the intended recipients. RPA can monitor mail inboxes, identify relevant emails by crawling the subject line, send notifications when relevant emails arrive, extract mail data, and update it in the ERP.

Billing Data

For queries regarding payment issues, RPA can be configured to log in to the ERP and access the designated billing folder/file to invoke the relevant data within seconds. For invoicing, bots with intelligence can also handle error reconciliation, data input, and parts of the necessary decision-making process.

SLA Management

Bots can be configured to monitor the SLA plan's progress and intimate the stakeholders before the plan breaches. Using RPA, service managers can set priority fences so that the SLA job has the highest priority for the available computing resources.

Consumers are Impatient

82%

of consumers want an immediate response to their marketing and sales questions.

90%

of consumers want an immediate response to their customer service queries.

Percentage of customers who define "immediate" as 10 minutes or less.

Marketing

46%

Sales

62%

Support

60%

Live Chat

RPA can be deployed to integrate chatbots with disparate back-end applications such as ERP, CRM, customer engagement portals to give customers instant access to relevant data like product information, service case status, etc. On the flipside, chatbots can trigger RPA to perform specific tasks, such as auto calls and messages without human intervention.

Customer Surveys & feedback

RPA allows the CS department to auto-schedule survey templates for the intended respondents and sends timely reminders for participation. Bots can monitor customer responses, extract relevant information, copy it to a designated folder, and edit and filter it in the required format. They can also notify stakeholders and suggest data-driven corrective actions to stakeholders.

Service Reporting

Bots can be set up to prepare daily/weekly/monthly individual and team reports and share those with the intended recipients. To that end, bots access ERP/CRM data, process it, and use prebuilt templates with preset KPIs to create the reports in the desired format.



Social Media Integration

Businesses can use RPA to gather customer/public feedbacks and opinions on their offerings/company image from social media platforms. Automating the process makes it easy to collect relevant data, process it to meet preset formats, and share the output with stakeholders.

Case Triaging

For cases that can't be handled by the chatbot or the ones that aren't addressed within the stipulated period, RPA could be introduced to escalate those to the right people based on the nature of the grievance. This is followed by timely reminders as follow-ups until the case is addressed.

61%
of customers stopped doing business with at least one company last year because of poor customer experience.

ITMS



Network monitoring

Bots can be deployed to monitor the organization's IT network 24/7, even when the IT team isn't at work. RPA allows the IT team to set up automated actions for frequently arising problems such as slowed network due to network overload, printer connectivity issues, Wi-Fi issues, slow application response, etc. Whenever such an issue is detected, bots send immediate notifications to the IT team stating the problem details and the steps to be taken.

User account creation

Whenever such a request is received in the bot's queue, it initiates the creation of a new user account. RPA validates requests and exceptions, and creates user accounts, and provides default access provisions. The concerned manager is notified about the account creation, and the status of the request is updated to "solved". Any exceptions during the handling of requests are dispatched to the service desk for intervention.

Reporting

RPA can extract details about the performance and workload of the IT department by logging into the ERP. Bots can extract data about the number of requests received, resolved, or unattended; type of cases received and time required to solve those; hardware used, etc. RPA can compile such data in IT reporting templates and email them on a daily/weekly/monthly basis.

Mitigate cybersecurity threats

Bots can be configured to restrict intrusions and/or spread of viruses by running a fast-paced analysis of any malware detected. For instance, bots can disable or lock via email the detected hostile users' data access. RPA allows only people with specific credentials to access sensitive data within the organization. RPA can add an additional layer of encryption for secure data usage.

Data migration

An RPA services provider can design and implement robotized migration processes to read input files and copy them to the system one-by-one in the required sequence. Bots can be configured to track the data migration progress and share detailed status for quality and success monitoring.

User notification optimization

Activated by a task scheduler, bots can log into the ITSM tool, run and access reports, and capture pending cases. They can also send emails to the user, update ticket statuses, and send audit reports. Process anomalies are redirected to the service desk through emails for manual processing.

Password Reset

Whenever an employee places a password reset request using an email or a portal, bots create a service request and mark it as urgent or non-urgent based on the employee's inputs. Bots then pick such requests from the work queue, log into the Active Directory, and spot the details of the employee. Following this, bots reset the password and send the new password to the user. The request status is updated to "resolved" and the service desk team is notified of any exceptions.

Cast/Request follow-ups

For any time-consuming, IT service/product inquiry or request that's initiated either from the IT team or other employees, bots can be configured to send follow-up notifications and messages. Bots can send the follow-up requests to the concerned party, monitor replies, and intimate the sender when a reply is received.

IT ticket triaging

Bots monitor service requests coming from emails, service portals, or chatbots. They refer to the database for commonly asked questions and common service requests such as password change/verification, account authentication, etc. For a large inflow of requests, bots can be configured to prioritize cases based on their context. For any exceptional case requiring human intervention, RPA can route it to the concerned individual based on the case specifics.

Remote work setup

RPA can help in error-free registrations of new equipment. Bots can be leveraged to set up users for VPNs, and associate users with recently bought equipment (using their employee ID). RPA can ingest employee postcodes and check the quality of their home broadband and 4G connectivity.

Interview Scheduling

Bots can be used with real-time calendar visibility to set up interviews with candidates by sending them invitation emails. When interviews are confirmed by both the candidate and the interviewer, a confirmation mail is sent to both. In the case of interview cancellation or postponement by either side, bots send an email to the other informing them about the same.

Employee Training

RPA can be used to track an employee's training and certification goals with pre-defined KPIs. Bots can access the employee's goal completion rate, exam results, and training history. For conducting training sessions, bots can group candidates as per the criteria, send training invites to groups or individual employees, enroll candidates, and set timely program reminders.

Leave Management

Whenever an employee applies for leaves, bots send an intimation to the manager along with the leave details. The approval/disapproval status is shared with the leave applicant and the HR. Bots also keep a tab on the employee leave balance and intimate the individual if they have no paid leaves left to avail. Furthermore, bots can draw employee absenteeism patterns and suggest to the concerned managers about any trend that needs their focus.

Travel Budget

Whenever an employee creates a travel request in the portal, a bot automatically creates a budget for the same as per the trip details and employee level. If the booking exceeds the permitted budget, the employee's manager gets an email seeking justification. If the manager approves the budget, the bot creates the travel expense, otherwise, it's sent to the employee for revision.

Employee Onboarding

A competent RPA firm can deploy bots to send welcome emails to the new joiners with the employee form and the list of all documents they need to submit. The manager is also sent a notification about the onboarding task list. On receiving the documents from the new employee, the bot verifies the same (using OCR software), shares them with the HR team, and stores them in the designated folder. Bots can also share a list of the onboarding next steps with individuals so that they can act upon it.

Employee Exit

RPA can send email notifications to all stakeholders about the exiting employee's last date and other important details. Bots can use a pre-built checklist to decide on employee clearance, and send the exit interview form to the candidate. RPA also files the employee's contact details, job role, and other information for future reference.

Human Capital Management (HCM)

Candidate sourcing

RPA can be deployed to assist recruiters with shortlisting profiles from online resources based on the position criteria. Bots can communicate with candidates seeking and verifying their resumes, cover letters, and contact information. RPA can assist in pre-screening questions regarding the education, experience, and skills of candidates and share the data with recruiters.



Employee Resignation

Bots send resignation letters to the employee's manager and other concerned authorities for review; the acceptance/rejection status is updated in the employee portal. On acceptance of the resignation, bots inform the employee about their payroll, non-disclosure agreement, and other documents, and get their signatures wherever required. Bots can also access the HR policies to inform the exiting individual about their responsibility transfer procedure.

Time Management

Bots can extract data from the attendance machine and compile it to inform employees and their managers about the log-in/log-out times of the former. Warnings and intimations can be sent to regular time violators, seeking explanation and processing information from reply emails for the HR and the manager.

Employee calendar

Bots can keep track of employee calendars by checking the time and duration of their booked appointments to avoid calendar conflicts. Bots can pull data of the previous month/week's appointment and present a detailed report on the time spent on different activities, enabling the individual to optimize their work time.



Easily Scalable

Bots can be added or withdrawn from jobs at will, depending on the requirements. They can be trained and deployed efficiently while maintaining complete consistency.



24*7 Worker

Unlike humans, bots do not tire and can work round the clock with amazing efficiency. This unequalled productivity gives that human workforce time to focus on the more critical tasks, increasing overall productivity

Save Costs

Recruiting, hiring, training, and retaining people involve huge expenses. On the flip side, bots don't ask for salary or even take leave. Moreover, they work much faster and for longer periods as compared to humans. The cumulative effect of these implies huge savings on the operational expenses.



Delighted Stakeholders

As employees are relieved of the tedious tasks, they are motivated to contribute more to the other value-adding activities of the organization. Also, external stakeholders such as customers and business partners are satisfied with the prompt actions and replies to their requests and queries.



Compiling the Benefits of RPA in the Business Context

It's not without reason that over the last few years, RPA has garnered enviable popularity among modern business technologies. Its non-invasive nature, ease of implementation, easy scalability, and high efficiency comprise its primary USP. This explains why its global market size is expected to touch \$11 billion by 2027, expanding from 2020 to 2027 at a CAGR of 34%. Here is a compilation of the factors that are attracting modern business to RPA at an incremental pace.



Nalashaa's Unique RPA Approach

We have leveraged our years of experience to devise an RPA implementation framework that has been perfected over time. For AS400/IBM i organizations, we ensure extra care to bring their ecosystem up to speed and exceed the expectations of the modern workforce. Here's a glimpse of our time-tested automation approach.



Identify the scope

After convincing you about the benefits of RPA, we begin the engagement by closely studying your business nature and workflows. We zero in on the tasks and processes to automate based on your goals and strategic priorities. We start with processes that are marked by repetitive and routine calculations; data entry, validation, and retrieving; and frequently-asked queries.



Analyze the feasibility

Our RPA team makes a thorough analysis of the project dynamics and considers all possible scenarios to assess the risks and feasibility of the undertaking. While we always keep you in the loop, our team goes about devising ways to mitigate the risks and make project success imminent.



ROI Analysis

Our experts help you calculate the project costs by factoring in all monetary and non-monetary expenses involved in the process. We also factor in the time your employees would need to get used to the change and turn productive. You can compare these to the expected results of the change, including increased throughput, reduced and reduced costs, higher consistency, and greater customer satisfaction.



Design and Implementation

Once the above steps are executed, the team gets to the real work where it procures the bots, configures them as per your business needs, and creates multiple scenarios with KPIs for managing, governing, testing, deploying, and auditing the project. We also zero in on the infrastructure and procedures required to support the technology.



Measure the Results

Along with the long-term goals, we also focus on the short-term results of the assignment, where we compare the past indicators with the present ones—for example, the previous and current ratio of throughput to cost. This helps us to track project success over the long term. In addition, we help you devise ways to measure the less tangible impacts, such as customer reviews and employee retention.

Why Count on Our AS400/IBM i Expertise?

At Nalashaa, we possess the right mix of AS400/IBM i and RPA resources to transform the scope and capabilities of your ERP. Over the years, we have helped several AS400/IBM i enterprises with system enhancements to improve their operations and enable them to attain their business goals. With several multinational corporations as our delighted clients, we have earned the reputation of being a reliable AS400/IBM i partner. Our flexible plans make it easy for organizations of every size to join forces with us to reimagine the ways their long-standing machine serves them.

ABOUT

NALASHAA

THINK SIMPLE, BUILD POWERFUL

This is not just our philosophy, it's our way of life. Simplicity and clarity of thought can go a long way today as technological advancements are rolling out at a fast pace. We are determined to deliver simple solutions that meet your expectations and help you derive meaningful insights and outcomes for your business.

To know more about how we
can help you achieve a high-end
modernization experience...

Speak with the Experts



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