

CASE STUDY

How We Eliminated 11 Hours of Weekly Admin Labor Without Writing a Single Line of Custom ERP Code

Purchase Order Automation for a Mid-Market Distributor

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20 Minutes Per Order. Every. Single. One.

- 1 Customer Service receives purchase order files for ERP entry
- 2 Every order keyed into legacy ERP by hand, field by field
- 3 Defaulted fields corrected one at a time: ship date, payment terms, shipping method
- 4 Live routing screen navigated manually for each order
- 5 Every line item entered individually
- 6 Future-dated POs commit inventory immediately, creating warehouse cleanup work

We Almost Built the Wrong Thing

THE OBVIOUS ANSWER

Automate the CS manual entry into open orders. But the ERP's routing engine needs live shipment data mid-workflow. A static file can't provide that context.

Custom ERP code required.

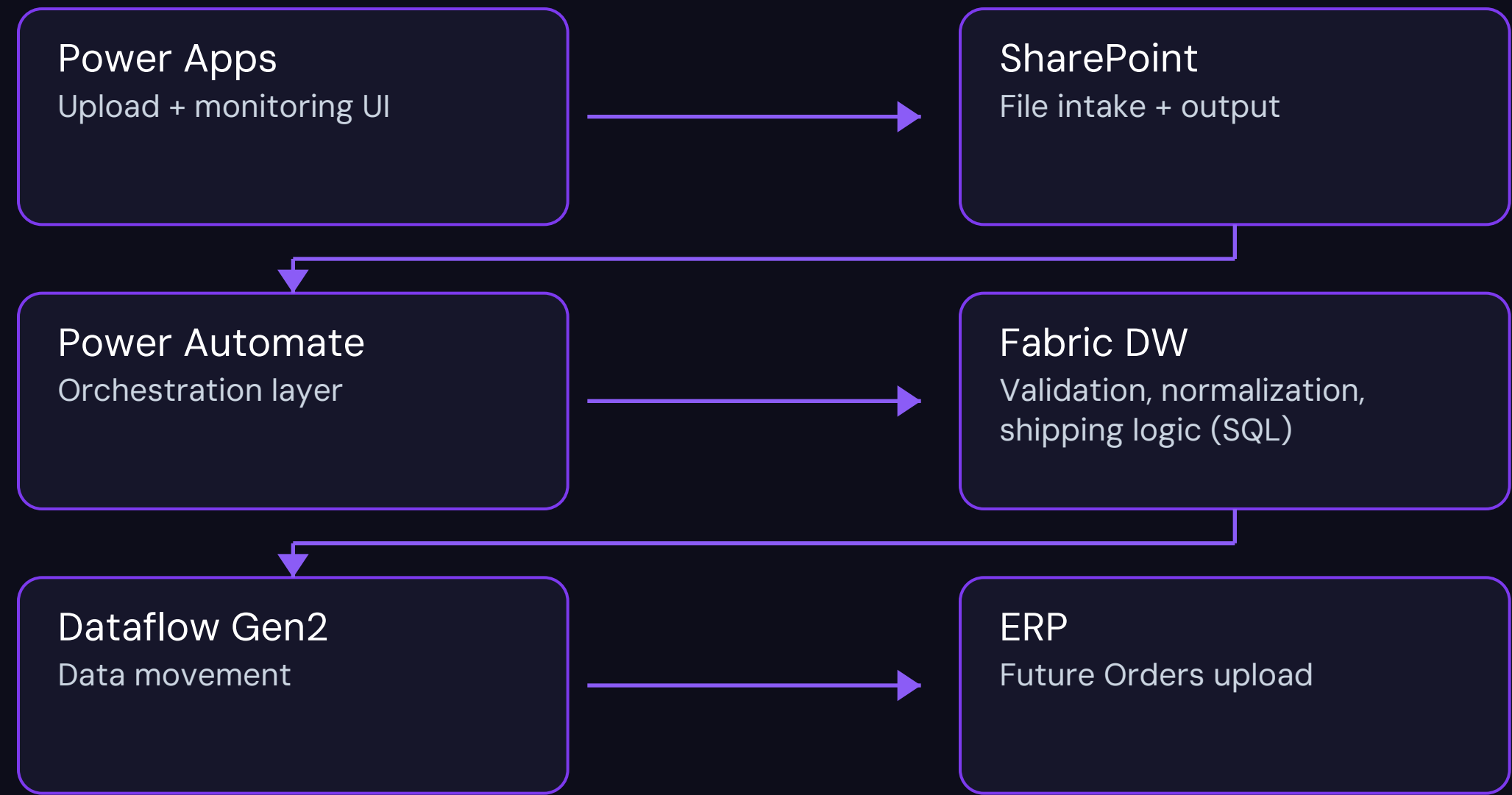
WHAT WE BUILT INSTEAD

A batch processing layer targeting Future Orders. Orders enter the ERP without committing inventory. Routing activates later with live data, as designed.

Zero custom ERP code.

We used the ERP's own mechanism. We just changed where in the workflow the data enters.

Built on Microsoft Power Platform + Fabric



What We Deliberately Kept Out of v1

- No direct routing system integration
- No direct writeback into open orders
- No concurrency or live API integration with ERP
- One active batch at a time, by design
- Manual Customer Service audit before any upload

The goal was to eliminate work that should never have required human attention, not to replace the humans who bring operational context to the process.

RESULTS

11 hrs

admin labor eliminated
per week

20 min

manual process now
system-handled

Zero

custom ERP
modifications

- No premature inventory commits
- No warehouse cleanup workflows
- ERP-agnostic: architecture moves with the business
- CS audits in minutes, not hours

Not Every Problem Needs a Model.

Sometimes the highest-value work is finding the right structural target inside a system that has been doing things the hard way for years, and building a clean layer on top of it.

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