

Case study:

Revolutionizing Quotation Processing with the Automated Quotation Processing System



Company Background

The client is an Ireland based energy consulting and auditing company. They quality assure, audit, test, consult and implement energy projects for real-estate industry.

NEED FOR AUTOMATION



- **Manual Quotation Handling:** The traditional approach involved manual processing of Quotation PDF files submitted by clients. This manual effort was labor-intensive and susceptible to errors.
- **Communication Efficiency:** Manual processing led to delays in communication with clients, impacting response times and potentially hindering business relationships.
- **Data Accuracy:** Human errors in data extraction and processing posed risks to the accuracy of client records and quotation details.
- **Resource Allocation:** The increasing volume of quotations required significant human resources for manual processing, diverting valuable staff from more strategic tasks.

BEFORE AUTOMATION



Before the implementation of the Automated Quotation Processing System (AQPS), The company relied on manual processes for handling quotations:

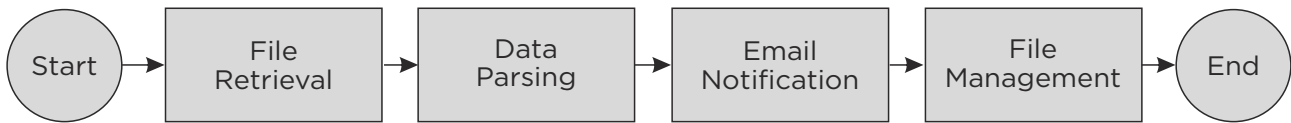
- **Manual PDF Handling:** Quotation PDF files submitted by clients were manually collected and stored.
- **Data Extraction:** Staff manually reviewed each PDF, attempting to extract critical information such as Quotation Numbers and product details. This process was time-consuming and error-prone.
- **Communication Delays:** The manual process led to delays in sending out quotations, impacting response times and customer satisfaction.
- **Resource-Intensive:** The manual process required a significant workforce to handle the increasing volume of quotations, diverting resources from other strategic tasks.

AFTER AUTOMATION



The introduction of the Automated Quotation Processing System (AQPS) brought about transformative changes:

- **Automated Quotation Handling:** The system is now initiated when clients manually submit Quotation PDF files. Automation streamlines the entire workflow.
- **Advanced Data Extraction:** AQPS employs advanced parsing techniques, including RegEx, to accurately extract Quotation Numbers and product details from structured tables in predefined templates.
- **Efficient Data Compilation:** Extracted data is systematically compiled for organized and accessible records.
- **Automated Email Notifications:** AQPS automates the process of sending professional and customized email notifications to recipients. It autonomously identifies and extracts recipient email addresses from the processed data. Each email contains the original PDF quotation file as an attachment and appropriately closes the processed PDF.
- **Efficient File Management:** The system employs efficient file management practices to enhance organization and optimize workspace efficiency.



Conclusion:

Notably, AQPS has reduced labor hours dedicated to quotation processing by an impressive 74% and trimmed processing times by 70%. Allowing it to improve its efficiency, accuracy, and professionalism in client communications. The company now enjoys cost savings, reduced manual effort, and enhanced customer satisfaction.