



BPA Platform

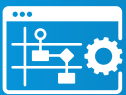
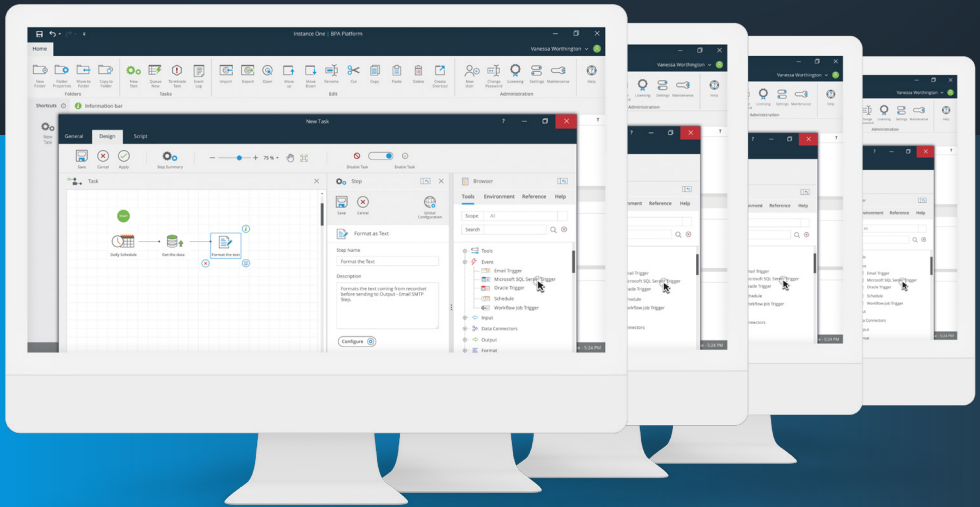
280+ Examples for
use in your Business

Business Process Automation

280+ Examples for use in your Business

BPA Platform has been used extensively worldwide to automate business processes across almost every business function.

We've compiled just some of the roles BPA Platform has filled to reduce costs and improve company performance.



BPA
PLATFORM

There are unlimited examples of how BPA Platform is used to automate unique and precise business processes, big or small.

Examples by Department

Helping you stay one step ahead of the competition

Build powerful automated business processes and workflows while maximising the value of your existing systems.

Our solutions can help you overcome the challenges faced in your industry or department. By streamlining your day-to-day processes we can help you get the most from your data.

Automate critical business processes across cloud, hybrid, and on-premises environments to boost efficiency, reduce manual tasks, and accelerate growth.



The following examples will outline the potential of BPA Platform, categorised by department and role within an organisation.

Examples by Department



Senior Management



Accounts & Credit Control



Purchasing



Manufacturing



Warehouse, Stock Control & Distribution



Marketing



Property & Facilities Management



Sales



Retail & Trade Counter



Customer Services & Helpdesk



Professional Services



Human Resources and Payroll



Information Technology



Health, Safety & Security



Vehicle Fleet Management



Senior Management

Process	Applicable (y/n)	Manual Hours Spent (p/m)	Employee Costs (p/m)
Automatic generation and distribution of management reports			
Real-time alerting on when business rules are broken			
Simplified authorisation via workflow of almost any document - purchases orders, contracts, timesheets, etc			
Notification of key transactions such as customers put on hold, large orders or payments received			
Monitoring of key financial metrics such as bank balances			
Monitoring of aged debt with alerts to directors at key milestones			
Reduced exposure to risk through automation of regular credit checks on customers			
High quality, up-to-date information, from across multiple systems			
Reminders for submission of key documents required by legislation			
Automated exception reporting			
Streamline operations by automating routine checks and enabling instant access to critical data across systems			
Subtotals			

“The flexibility of BPA Platform is remarkable. The things that you can do with it are out of this world. It never ceases to amaze me. It’s an incredibly efficient and powerful tool. I always equate BPA Platform to being a staff member that never sleeps. It’s like an incredibly efficient person, or team of people, checking data, that never stops.”

Malcolm MacLean Global Head of IT, Graff Diamonds



Accounts & Credit Control

Process	Applicable (y/n)	Manual Hours Spent (p/m)	Employee Costs (p/m)
Alert staff when key activities occur in finance / ERP systems <ul style="list-style-type: none"> ▶ Customers put on hold ▶ Orders waiting for manual release ▶ Credit limit change requested 			
Inform sales people of daily, weekly, monthly sales			
Distribute news of payments received			
Alert directors of aged debt situation			
Print debt chasing letters automatically			
Schedule debt collection phone calls automatically			
Warn about unallocated invoices			
Notification when invoice is allocated to the wrong nominal code			
Alert if goods are shipped but no invoice is raised			
Print / email monthly statements automatically			
Run and distribute key financial reports			
Simplify authorisation processes such as purchase requisitions and purchase orders (see also 'Purchasing')			
Automated, regular credit referencing of customers via services such as Creditsafe			
Publishing key stats to SharePoint or other company intranet or distribute them via email in popular formats such as PDF and Excel			
Reminders for annual returns such as tax and VAT			
Subtotals			

 Purchasing

Process	Applicable (y/n)	Manual Hours Spent (p/m)	Employee Costs (p/m)
Stock level warnings – to high, too low			
Short shelf life stock warnings			
Purchase order authorisation workflows with support for complex authorisation hierarchies driven automatically by nature and value of goods being purchased			
Warnings of upcoming manufacturing requirements			
Details of new sales or projects won			
Chasing suppliers asking them to confirm POs have been received			
Chasing suppliers for confirmation that goods will be delivered on time			
Warning when an item is received into stock with margin that is too low or has been received at a buy price that is different to the expected cost price			
Seasonal stock warnings			
Spot documents not properly completed e.g. POs with no duty rate			
Alerts showing goods due in that have not turned up on time			
Automated price change notifications to sales team whenever a price is altered			
Order confirmations sent automatically to suppliers			
Identify unusual trends in product use or sales			
Subtotals			



Manufacturing

Process	Applicable (y/n)	Manual Hours Spent (p/m)	Employee Costs (p/m)
Automated calculation and distribution of KPI reports such as productivity levels			
Reminders sent automatically to staff who have not submitted timesheets			
Reports showing goods / orders to manufacture			
Notification when back-ordered stock has been received			
Warning when goods due in to today / this week have not been received			
Automated utility usage monitoring and warnings when using deviates from norm			
Monitoring of equipment performance with alerts sent via text message			
Service reminders on manufacturing equipment generated automatically			
Notifications to other departments when manufacturing of key orders is complete			
Automated production and delivery of documents required by law such as: ▶ Safety Data Sheets required by REACH legislation			
Checking manufacturing progress is adequate to hit target delivery dates			
Regular production of stats required by quality schemes such as ISO and Six Sigma			
Out of hours notification when key orders have completed manufacture – often requested by directors			
Subtotals			



Warehouse, Stock Control & Distribution

Process	Applicable (y/n)	Manual Hours Spent (p/m)	Employee Costs (p/m)
Stock level warnings – too high, too low			
Slow moving stock identification			
Short shelf life stock warnings			
Alert if excessive time is taken to pick an order			
Delivery ETAs sent automatically to customers when sales orders received – these can be sent by email, fax or text message			
Goods dispatched notifications sent to customers			
Warnings of large stock movements due			
Automatic notification of any sales orders left open so they can be closed to permit picking to start			
Alert if a customer is put on credit hold while an order is in the process of being picked for them			
Warning when an item is receipted into stock with margin that is too low or has been receipted at a buy price that is different to the expected cost price			
Reminders sent automatically to staff who have not submitted timesheets			
Update web shops with details of products currently in stock			
Publish real-time stock availability information to SharePoint, other intranets and web shops			
Allowing customers and sales staff to check stock levels of a product simply by sending a text message or email to BPA Platform			
Chasing suppliers for confirmation that goods will be delivered on time			
Subtotals			



Warehouse, Stock Control & Distribution (Continued)

Process	Applicable (y/n)	Manual Hours Spent (p/m)	Employee Costs (p/m)
Alerts showing goods due in that have not turned up on time			
Maintain web based lists of planned delivery times for easy access by customers			
Out of hours notification when key orders have been picked and shipped – often requested by directors of companies that operate 7 days a week and have key customers such as the major supermarkets			
Automated calculation and distribution of KPI reports such as inventory reports			
Automated delivery of stock adjustment reports to managers to keep them informed of what stock adjustments staff are making			
Monitoring of equipment such as chilled storage and freezers with alerts sent via text message			
Service reminders on warehouse equipment generated automatically			
Service and road tax reminders for vehicles generated automatically			
Automated production and delivery of documents required by law such as: ▶ Safety Data Sheets required by REACH legislation			
Regular production of stats required by quality schemes such as ISO and Six Sigma			
Subtotals			



Marketing

Process	Applicable (y/n)	Manual Hours Spent (p/m)	Employee Costs (p/m)
Automation of key marketing campaigns such as: <ul style="list-style-type: none"> ▶ Appointment making ▶ Upgrade / up-sell / cross-sell marketing ▶ Reminders to order (for companies selling consumables) 			
Automatic notification when leads generated by marketing activity and passed to sales team are not followed up in target timescale			
Automatic chasing of salespeople for feedback on leads generated by marketing			
Monitoring of telemarketing activity and success rates			
Alerting if any key customers or prospects have not been touched by marketing activity recently			
Alerting Account Managers when their key customers follow links in marketing emails			
Maintenance of reporting dashboards showing key marketing metrics			
Welcome letters / emails automatically sent to new customers			
Allow customers and prospects to use text messages to request details of items for sale, an example being estate agents who put codes and a mobile number on For Sale boards – texting the property code in to BPA Platform sends the enquirer details of the property including the current asking price			
Monitoring marketing databases and CRM systems for poor quality data, missing data and potential duplicates			
Reports showing products being kept in stock that are not listed on the company's web shop			
Publish current call centre telephone waiting times and activity to large screens			
Subtotals			



Property & Facilities Management

Process	Applicable (y/n)	Manual Hours Spent (p/m)	Employee Costs (p/m)
Sending reminders of electrical and gas equipment due for testing or servicing e.g. PAT testing			
Sending reminders of properties due for a maintenance inspection			
Sending rent reminders to tenants automatically by post and text message			
Automating alerts sent by conveyancers informing buyers when property searches have been done			
Sending management reports to landlords automatically			
Allowing prospective purchasers to request more details by simply sending a text message when they are standing outside a property			
Allowing tenants to enquire about their rent situation via text message			
Allowing tenants to request property repairs and request rent statement via text message			
Issuing reminders of rent reviews			
Maintaining up-to-date web based lists of properties for sale			
Subtotals			

“BPA Platform has delivered improved cash flow due to better data available for communicating by email, reduces overall admin costs and having automated processes, such as payment receipts and regular statements sent, improves the time taken for invoice payments. Customers have much more visibility of their accounts now.”

Carly Cullen, Office Administrator, Priors Hall Park Management



Sales

Process	Applicable (y/n)	Manual Hours Spent (p/m)	Employee Costs (p/m)
Workflow to automate the process of having quotes and proposals authorised by managers			
Workflow to automate the process of having discounts authorised by managers			
Automated follow up of sales opportunities that have not been chased for 'x' period			
Sales forecast reports generated and distributed automatically			
Automated updating of price lists through integration with systems of key suppliers			
Allowing customers and sales staff to check stock levels of a product imply by sending a text message or email to BPA Platform			
Cash received reports sent directly to sales people			
New enquiries highlighted to sales people quickly			
Sales league tables distributed automatically			
Weekly / monthly activity reports generated automatically			
Subtotals			

“All this data from the various systems, which previously would have to be manually transferred, is now being pulled automatically, on schedule or on demand, via BPA Platform. It’s allowing for a lot more efficiency and time saving because data is flowing backwards and forwards. It’s a massive time saver. I can sit back and relax and let BPA Platform get on with it.”

Lee Hughes, Head of Business Systems, IQGeo



Sales (Continued)

Process	Applicable		Manual Hours Spent (p/m)	Employee Costs (p/m)
	Y	N		
Chasing sales people who have not submitted activity reports or other documents				
Alerting sales people when their activity levels fall below pre-set thresholds				
Highlighting quotes / proposals prepared with unusually low margin levels				
Alerts to sales people when one of their customers gets put on credit hold				
Summaries of recent orders placed by their customers sent to sales people				
Orders received or goods dispatched notifications sent immediately to sales people in relation to key customers				
Notification to a sales person when another person, for example a member of the customer service team, speaks to one of their customers				
Notification to sales people when their customers place technical support calls or these are escalated				
Price changes automatic distributed to the sales team				
Subtotals				

“BPA Platform is now an integral part of our ecosystem. It is being used not just as part of the overall solution, but also as part of our overall design thought.”

David Kelly, Head of ERP Applications, Taoglas





Retail & Trade Counter

Process	Applicable (y/n)	Manual Hours Spent (p/m)	Employee Costs (p/m)
Automated reports including: <ul style="list-style-type: none"> ▶ Store sales ▶ Stock levels ▶ Productivity ▶ Inventory losses / shrinkage 			
Automation of marketing including that associated with loyalty schemes			
Identification of regular customers who have changed their buying pattern			
Reminders sent automatically to customers who buy consumables: 'Don't run out'			
Reminders sent automatically to staff who have not submitted timesheets			
Stock level warnings: too high, too low			
Short shelf life stock warnings			
Automatic distribution to stores of: <ul style="list-style-type: none"> ▶ Price changes ▶ Remove from sale notices ▶ End of line information ▶ Delivery schedules 			
Chasing suppliers for confirmation that goods will be delivered on time			
Seasonal stock warnings			
Subtotals			



Retail & Trade Counter (Continued)

Process	Applicable (y/n)	Manual Hours Spent (p/m)	Employee Costs (p/m)
Identify unusual trends in sales			
Update web shops with details of products currently in stock and pricing			
Allowing customers and sales staff to check stock levels of a product simply by sending a text message or email to BPA Platform			
Automatic emails and text messages to customers: 'Your goods have been shipped'			
Allowing customers to subscribe to company news services like product updates or special promotions			
Out of hours notifications by text message to directors of store takings			
Automated delivery of stock adjustment reports to managers to keep them informed of what stock adjustments staff are making			
Monitoring of equipment such chilled storage and freezers with alerts sent via text message			
Reports showing products being sold in a company's bricks-and-mortar stores that are not: <ul style="list-style-type: none"> ▶ Being sold on their web shop ▶ On display in their trade showroom or portfolio samples 			
Reports listing discontinued or out of stock items that must be removed from sales / display in showrooms or portfolio samples			
Subtotals			



Customer Services & Helpdesk

Process	Applicable (y/n)	Manual Hours Spent (p/m)	Employee Costs (p/m)
Automatic notification to support team when new customer service or support calls are received			
Automated allocation of support calls based on the nature of the problem			
Notification to the customer via email or text informing them of the ETA of spares or an engineer should these be required			
Regular updates to customers keeping them informed of progress on their issues can be automated			
Highlighting to support staff support calls that are approaching SLA milestones			
Automated escalation of unresolved support issue			
Automated closure of tickets e.g. if customer does not provide a timely update after trying a suggested fix			
Regular generation of reports for each customer showing the support they have received recently, to help reassure them of the value of the support service they are being provided with. These reports typically show: <ul style="list-style-type: none"> ▶ Cases opened in past month ▶ Cases closed in past month ▶ Cases still open ▶ Average response time ▶ Average resolution time 			
Subtotals			



Customer Services & Helpdesk (Continued)

Process	Applicable (y/n)	Manual Hours Spent (p/m)	Employee Costs (p/m)
Automated communication encouraging customers who make support requests by phone to switch to using the provider's web based portal in future			
Returns tracking - generate automated reports from returns handling systems to highlight which products are being returned most frequently			
Issuing renewal of annual contracts can be automated			
Warranty due to expire shortly reminders to customers - possibly offering them extended warranties			
Automation of internal reporting on performance such as closure rate on first call and average time to resolution. These reports could be published to SharePoint, another intranet system or delivered via email in popular formats such as PDF and Excel			
Subtotals			

"We needed to find a product that we could use to interrogate our existing data sources and then use APIs to move that information into other destinations.

I was already aware of Codeless Platforms' product from a previous job and knew its capabilities, how it worked and how flexible it could be, which is why I was quite keen to implement it here. We were able to get a number of processes up and running in a very short period which are querying publicly available APIs and bringing back National Grid balancing mechanism data."

Nick Powell, Director of IT, Anesco



Professional Services

Process	Applicable (y/n)	Manual Hours Spent (p/m)	Employee Costs (p/m)
Informing team members when new cases are received that will involve them			
Automated internal alerts to notify relevant staff when a new client is fully entered into practice and project management systems			
Automated letter production to inform clients of progress with their case, ideal for solicitors, conveyancers and similar professionals			
Monitor overtime worked and inform directors when thresholds exceeded			
Reminders for annual returns			
Automated reminders to clients to submit information or issue instructions required for annual returns such as tax and VAT			
Reminders for project milestones and deadlines			
Monitor progress of jobs 'vs' deadlines			
Monitor whether jobs have been finished within 'target completion time'			
Warn about invoices raised without a project code			
Automation of fee collection letters using filters to exclude those clients recently contacted about their debt			
Weekly lists of overdue debts, so staff know the debt situation of each customer when speaking to them on the phone			
Inform directors when debts reach significant ages			
Improved data quality by cross-checking client records to identify and correct missing or inconsistent details, such as addresses			
Identifying clients who haven't issued any instructions in a given period			
Subtotals			



Humans Resources and Payroll

Process	Applicable (y/n)	Manual Hours Spent (p/m)	Employee Costs (p/m)
Holiday requesting workflow to simplify passing requests to managers for authorisation			
Holiday reminders to encourage staff to use their holidays evenly throughout the year			
Requests to employees for details missing from HR records - next of kin, phone numbers, etc.			
Monitoring of time and attendance records and alerting when anomalies are found such as regular lateness or excessive overtime			
Alerting directors with details of how much overtime people are working			
Sickness monitoring with alerts sent if an employee has an abnormally high number of sick days			
Automated alerts to managers when an employee's probation period is nearing completion			
Automated welcome emails to new starters, including manager details, role responsibilities, expense and holiday procedures, and intranet access			
Chasing employees for overdue timesheets or asking them to re-submit if they were incomplete			
Chasing employees for missing payroll information such as bank details and P45s			
Alerting managers when staff leave			
Enable employees to check remaining holiday via text message, with BPA Platform retrieving and replying with up-to-date balances			
Provide easy access to staff rotas via text message, allowing managers to quickly identify on-call emergency staff at any time, even during off-hours			
Subtotals			



Information Technology

Process	Applicable (y/n)	Manual Hours Spent (p/m)	Employee Costs (p/m)
Automatically generating and distributing reports from information spread across a wide range of a company's systems - this can free up a considerable amount of time for many IT departments			
Keeping information on intranets up to date			
Automating movement of information between disparate IT systems			
Simplifying integration with IT systems used by suppliers and customers			
Monitoring that key websites are working properly - sending alerts via text message if they are not			
Monitoring that key software packages, such as financials systems, warehouse and time recording systems, are working properly - sending alerts via text message if they are not			
Checking available hard disk spaces on servers: sending alerts if this falls below preset thresholds with the option to do automated deletions from Temp folders			
Avoiding the need for new skills through use of a graphical, drag and drop user interface			
Reducing the number of places from which automated tasks have to be administrated			
Providing automatic rollover and resilience to ensure automation is never interrupted			
Subtotals			



Health, Safety & Security

Process	Applicable (y/n)	Manual Hours Spent (p/m)	Employee Costs (p/m)
Machinery service and safety check reminders sent to factory managers			
Vehicle service and safety check reminders sent to drivers of company cars or fleet manager			
PAT testing reminders sent to owners of electrical equipment including laptops reminding them to have it tested			
Automated production and delivery to customers of Health & Safety related documents required by law such as Safety Data Sheets required by REACH legislation			
Automation can be provided to chase any staff who do not confirm they have fulfilled instructions sent to them in Health and Safety reminders			
Reminders to submit compliance documentation before the relevant deadlines			
Generate alerts by email or text message when there is unexpected access to buildings or restricted zones			
Monitor property access control systems for unusual patterns of access and highlight these to the security manager for investigation			
Alerting security manager when staff leave the company to ensure their door access card is deactivated			
Alerting security manager when a new member of staff is recruited so that they can be issued with a door pass and other security related items			
Subtotals			



Vehicle Fleet Management

Process	Applicable (y/n)	Manual Hours Spent (p/m)	Employee Costs (p/m)
Reminders sent automatically to drivers of company vehicles or fleet managers for: <ul style="list-style-type: none"> ▶ Services ▶ MOT ▶ Road Tax 			
Requests sent automatically to drivers of company vehicles asking them to confirm details held by the company of their: <ul style="list-style-type: none"> ▶ Motoring offences ▶ Driving licence points ▶ Recent accidents and insurance claims 			
Reminders to conduct safety checks sent to drivers of company vehicles instructing them to check: <ul style="list-style-type: none"> ▶ Tyre pressure ▶ Depth of tread ▶ Brake wear ▶ Oil level ▶ Water level 			
Automation can be provided to chase any drivers that do not confirm they have fulfilled instructions sent to them in reminders			
Automation of fleet status reports			
Monitoring of vehicle mileage and fuel usage – alerts generated when usage deviates from the norm			
Subtotals			

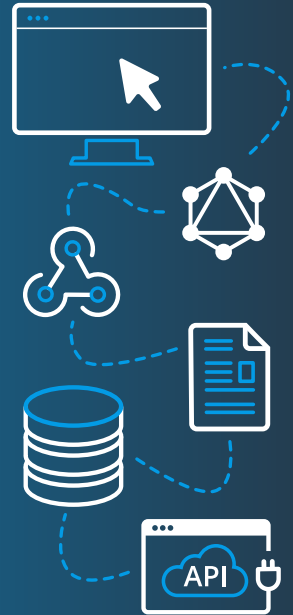
Examples by Technology

Bringing your systems, information and people together

Seamlessly integrate your applications, legacy systems and web services - anywhere your business operates.

Our low-code data integration tools deliver enterprise-level capabilities at an SMB price, enabling seamless integration of systems, platforms, and applications, including ERP, CRM and web services, through a simple, intuitive graphical user interface (GUI).

Effortlessly connect third-party APIs, SQL Server, ODBC, OLEDB, and REST/SOAP/GraphQL web services, to automate workflows and drive business growth.



The following examples will outline the potential of BPA Platform, categorised by technology and business systems.

Examples by Technology



ERP Systems



Service Management



CRM Systems



Expense Management



eCommerce



Courier and 3PL Logistics



Payment



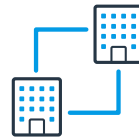
EDI



Marketing



Warehouse Management



Intercompany



File Sharing

Business Process Automation

280+ Examples for use in your Business



ERP

Acumatica, Epicor, Microsoft Dynamics 365 Business Central, NetSuite, Sage 200, Sage Intacct, SAP Business One, SAP Business ByDesign, SYSPRO

Process	Applicable (y/n)	Manual Hours Spent (p/m)	Employee Costs (p/m)
Pull customer data from other systems into ERP systems			
Monitor ERP software for anomalies, duplicate information etc.			
Automate workflow authorisations, e.g. purchase requisition or PO authorisations			
Update ERP systems with incoming payments from payment gateways			
Automate customer communications, delivery notifications and service alerts			
Update stock levels and pricing between systems			
Automate the generation and distribution of reports			
Notify account managers of changes to customer information			
Subtotals			



Service Management

HaloPSA, QuoteWerks, ServiceNow, Zendesk

Process	Applicable (y/n)	Manual Hours Spent (p/m)	Employee Costs (p/m)
Automate the transfer of financial data between systems			
Automatically import sales opportunities, requests or enquiries from CRM, marketing or help desk software			
Automate the posting of journal entries, reverse journal entries and auto-reverse accruals in financial software			
Subtotals			



CRM

Agile CRM, Creatio CRM, HubSpot, Infor CRM, Microsoft Dynamics 365 CRM, Pipedrive, Pipeliner CRM, Salesforce, SugarCRM, Zoho CRM etc.

Process	Applicable (y/n)	Manual Hours Spent (p/m)	Employee Costs (p/m)
Push customer data from other systems and data bases into CRM systems, e.g. websites, portals, flat file imports etc.			
Monitor CRM software for anomalies, duplicate information etc.			
Automatically schedule follow up activity, including cross-sell and upsell opportunities			
Notify account managers of changes to customer or partner information			
Automate targeted marketing campaigns and profiling			
Query CRM systems, retrieving information, formatting and distributing			
Automate communication with customers, partners and suppliers			
Respond to customer enquiries and requests for information			



Expense Management

Expensify, SAP Concur

Process	Applicable (y/n)	Manual Hours Spent (p/m)	Employee Costs (p/m)
Approve expense reports and enter into other systems as GL journal entries			
Automatically generate expense reports and attach receipts Rules-based workflow authorisations			
Synchronise cost centre lists Automatically back up important files			
Automate the posting of journal entries to permanent ledger after data entry			
Subtotals			



eCommerce

BigCommerce, Magento, Shopify, WooCommerce, Amazon, eBay, PrestaShop, Wayfair

Process	Applicable (y/n)	Manual Hours Spent (p/m)	Employee Costs (p/m)
Push order statuses, new products, stock level changes, delivery tracking numbers etc. into web stores			
Pull orders down from eCommerce stores into CRM and ERP systems			
Improve the management and consistency of product information with a dedicated PIM system			
Push data collected by the online stores into existing CRM systems to assist sales staff with cross selling and upselling			
Automatically update an eCommerce application when a 'complete' or 'shipped' status is created within an ERP system			
Subtotals			



Courier and 3PL Logistics

DHL, DPD, FedEx, MetaPack, ParcelBroker, Parcelforce, ShipStation, SmartFreight, TNT, UPS

Process	Applicable (y/n)	Manual Hours Spent (p/m)	Employee Costs (p/m)
Automate the printing of consignment labels			
Identify orders that need fulfilment			
Publish tracking numbers to customer portals and eCommerce solutions			
Send delivery and tracking number notifications to customers via SMS or email			
Pull proof of delivery data into business software			
Automate the creation and distribution of reports			
Automatically share intelligence data (trends, faults or failures)			
Subtotals			



Payment

Agicap, GoCardless, PayPal, Stripe, Worldpay

Process	Applicable (y/n)	Manual Hours Spent (p/m)	Employee Costs (p/m)
Update systems with payments, whether successful, failed or fraudulent			
Automate bank reconciliation processes			
Monitor and compare data held within accounting or ERP solutions with payment providers			
Automatically notify employees via email or SMS about discrepancies			
Automate the creation and distribution of invoices for payments			
Automate the generation of notifications for failed collections			
Subtotals			



EDI

Transalis OpenEDI, TrueCommerce

Process	Applicable (y/n)	Manual Hours Spent (p/m)	Employee Costs (p/m)
Automatically receive and send EDI transactions			
Automatically push EDI data back into other systems			
Rules-based workflow authorisations			
Dynamically monitor key EDI data and send business alerts			
Automatically back up important files			
Subtotals			



Marketing

dotmailer, MailChimp, CommuniGator, ExpertSender, Communicator, Elastic Email, HubSpot, Marketo

Process	Applicable (y/n)	Manual Hours Spent (p/m)	Employee Costs (p/m)
Synchronise contact lists with CRM or ERP systems			
Synchronise unsubscribe data between email software and CRM/ERP applications			
Automate email cleansing and verification to improve the deliverability of your communications			
Automatically create and send email campaigns based on business rules, e.g. slow moving stock or product price changes			
Automate the creation and distribution of campaign reports			
Automatically update CRM applications with campaign statistics and setting sales team member follow-up activities			
Automatic generation and distribution of welcome packs			
Alert account managers when key customers follow links in marketing emails			
Automate content aggregation from existing resources to generate emails			
Subtotals			

“The scope of the tools available with BPA Platform are really beneficial. I am both constantly surprised and pleased by the adaptability of BPA Platform. I can’t think of any occasions where I’ve looked at something we might want to do with BPA Platform and it’s not been possible.”

Steve Owen, Supporter Relations & Data Officer, Victim Support



Warehouse Management System (WMS)

WMS, Dexterity WMS

Process	Applicable (y/n)	Manual Hours Spent (p/m)	Employee Costs (p/m)
Stock level notifications – too high, too low			
Dynamically monitor systems for slow moving stock identification			
Short shelf life stock notifications			
Automatically send delivery ETAs to customers when sales orders are received			
Goods dispatched/shipping notifications sent to customers			
Automated warnings of large stock movements due			
Automatic notifications of any sales orders left open so they can be closed to permit picking to start			
Automatically generate alerts if product is entered in to a database with missing technical information, e.g. size, weight			
Automatically update eCommerce web shops with details of products currently in stock			
Subtotals			

“BPA Platform is just an extremely versatile product that helps us solve a wide-range of issues. It’s a tool that we have been using for a long time now and one that we are familiar with. BPA Platform just comes along and manages to fix everything and save the day. It’s a bit like your Swiss Army knife. We are always finding ways for BPA Platform to make life easier for us.”

Steven Oakley, Business Systems Manager, Viadex



Intercompany

Expensify, SAP Concur

Process	Applicable (y/n)	Manual Hours Spent (p/m)	Employee Costs (p/m)
Collect and publish journal entries across any number of consolidation companies within the organisational hierarchy—at both top and subsidiary levels—supporting multiple chart structures and local currencies for accurate financial reporting			
Automate the creation and delivery of intercompany trading documents—including purchase and sales orders, invoices, delivery and return notes, goods receipts, credit memos, and incoming/outgoing payments.			
Replicate master data across systems, including item catalogues, charts of accounts, cost structures (dimensions, cost centres, projects), currencies, exchange rates, and business partners.			
Subtotals			



File Sharing

Google Drive, One Drive, SharePoint

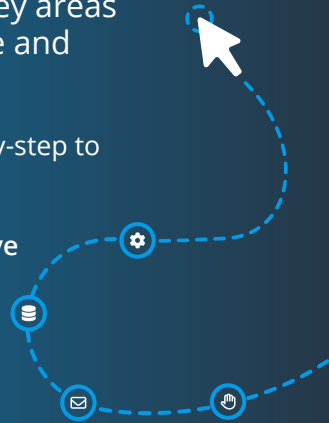
Process	Applicable (y/n)	Manual Hours Spent (p/m)	Employee Costs (p/m)
Copy or move any file type to a cloud-based file storage provider			
Automatically create the specified destination folder for the file at run-time			
Set Read Only attributes for files			
Limit the copying or moving of a file by setting a maximum file size to process			
Rename a file by using part of the existing file name or use a completely different value			
Restrict the deletion of a file by the date and time it was last modified			
Subtotals			

Planning your project

The first step in ensuring that your business process automation project is a success is to detail the key areas of the business that you would like to streamline and improve productivity.

Once a project overview is established, we've got a step-by-step to help you plan your implementation:

- ▶ Your current situation and what you'd like to improve
- ▶ Systems and applications
- ▶ Business case
- ▶ Project overview – what do you want to achieve?



Ask your account manager for the **BPA Project Management Workbook** to help you to identify the business processes that you would like to automate.

Establish system integration requirements and record bottlenecks, time and errors in current processes.



Calculate your Totals

280+ Examples for use in your Business

Examples by Department	Manual Hours Spent (p/m)	Employee Costs (p/m)
Senior Management		
Accounts & Credit Control		
Purchasing		
Manufacturing		
Warehouse, Stock Control & Distribution		
Marketing		
Property & Facilities Management		
Sales		
Retail & Trade Counter		
Customer Services & Helpdesk		
Professional Services		
Humans Resources and Payroll		
Information Technology		
Health, Safety & Security		
Vehicle Fleet Management		

Examples by Technology	Manual Hours Spent (p/m)	Employee Costs (p/m)
ERP		
Service Management		
CRM		
Expense Management		
eCommerce		
Courier and 3PL Logistics		
Payment		
EDI		
Marketing		
Warehouse Management System (WMS)		
Intercompany		
File Sharing		
TOTAL		

Want to learn more?

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