

Portalink has been helping Legrand Australia to manage their e-Catalogues since 2015.

In 2019, Legrand Australia launched their Portalink™C-Suite transaction engine which has eliminated most of the manual processing of customer purchase orders, eliminated errors and streamlined many of the demanding manual business processes.



We understand the importance of adapting our system to compliment the complex business needs for each Legrand region. Portalink is system agnostic and can be configured for any currency and/or tax requirement, making it a very flexible value-add business solution.

Tim Pope | Portalink CEO

 **THE PROBLEM**

 **THE SOLUTION**

 **THE OUTCOME**

 **MEASURE OF SUCCESS**

<p>1</p> <p>BEFORE PORTALINK 56% of all orders required manual data entry or manual intervention.</p> <p>Orders received by email and fax require 'high touch' manual data entry.</p>	<p>Portalink automatically captures and converts order documents into electronic data, with unprecedented accuracy.</p> <p>The new system eliminates most of the manual data handling that was previously required.</p>	<p>Time saved on manual data entry enables better customer service with faster order fulfilment and elimination of costly errors.</p> <p>Portalink frees up time for the team to focus on more rewarding customer service activities rather than being overwhelmed with order entry tasks that add no value to the business.</p>	<p>1] A total of 27,085 orders were processed of which 8,481 were PDF type orders received by email and fax (i.e. non-EDI).</p> <p>2] Of the non-EDI orders, 80% (6,795) are now processed within three minutes, and 28% (2,341) are now processed within 30 seconds</p> <p>3] The average processing time for all non-EDI orders was 2 minutes and 38 seconds (02:38).</p>
<p>2</p> <p>50% of all EDI orders require price matching.</p> <p>Many line items need to be matched to the correct quote before they can be imported to the ERP.</p>	<p>The Customer Service Team uses Portalink to link EDI orders to quotes at a line level.</p> <p>All EDI orders are channelled through the system for validation. The system uses an API to validate the order data with the ERP. Orders with nil discrepancies are auto-forwarded to the ERP. If the volume/price in the ERP does not match the price on the order, the system helps the team to link the correct quote.</p>	<p>A single system for managing EDI and non-EDI order discrepancies reduces time wasted trying to reconcile data across multiple applications.</p> <p>Portalink simplifies the process of matching the prices on a customer order with complex volume price lists from one system and quotes from another.</p>	<p>37% of all EDI orders have a discrepancy. Over 12 weeks: Of the 18,594 EDI orders processed in total, 6829 had at least one discrepancy.</p> <p>3530 (52%) of discrepant EDI orders required a quote linking to address.</p> <p>On average per day: With Portalink, 114 EDI orders with discrepancies are now being processed more quickly every day.</p>

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Non-EDI orders are prone to errors.

A high percentage of orders have common errors such as incorrect product codes; incorrect units-of-measure or multiples; incorrect prices; discontinued lines; marketability issues; freight charges based on delivery type; customer credit status etc.

Portalink helps the Customer Service Team resolve discrepancies.

The system cross-checks every piece of data on every order. By applying Legrand's business rules the system will automatically fix data errors or highlight them to the team with a recommendation of the most likely action required.

Portalink saves time and eliminates errors that may otherwise slip through.

If Portalink cannot automatically fix a discrepancy it highlights any variations at a line level and helps the team find the correct information so that they can make better decisions more quickly. Empowering the team to fix discrepancies in Portalink ensures that only orders that are 100% correct are imported into the ERP. The system also learns and gets quicker over time.

1] 66% of non-EDI orders have a discrepancy.

2] Almost two out of three extracted lines (65%) are marked discrepant for non-EDI orders flagged as such.

3] 26% of all discrepant non-EDI orders required quotematching.

4] 75% of all discrepant non-EDI orders were processed in less than three minutes; and 18% in less than 30 seconds.

The average processing time for non-EDI orders with discrepancies was 03:16 and non-EDI orders without discrepancies was 01:25. These processing times are expected to continue to improve over time.

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Allocating inventory to order lines.

A manually time-consuming process requires the Customer Service Team to identify the next closest Distribution Centre when insufficient stock is available at the default warehouse.

Portalink automatically allocates the best stock options from the nearest Distribution Centre (DC).

The system uses an API to check available inventory for each order line before passing an order to the Customer Service Team. If inventory is not available at the default DC, the system applies Legrand's business rules to select the next best DC that has available stock.

Auto-allocating inventory in Portalink prevents the need to double-handle orders when they are received by the ERP.

The system prevents the risk of errors and saves a considerable amount of time and effort.

1] Portalink automated the selection of a different warehouse for 2099 order lines on 1,142 (or 4.22%) of orders.

2] The average processing time for alternate-DC orders is 02:26

3] 81% of alternate-DC orders were processed in less than three minutes; 36% were processed in less than 30 minutes.

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Data is not centralised in one system.

The Customer Service Team needed to cross-reference multiple systems to find the information needed to complete the entry of purchase orders.

Portalink integrates with multiple systems to capture product, pricing, quotation and inventory data which enables the Customer Service Team to manage orders in a single, easy-to-use portal.

Legrand Australia process 100% of their orders through the system.

Portalink either auto-fixes order errors or puts all the necessary information at the fingertips of the Customer Service Representative. This ensures that all orders received by the ERP are 100% correct.

The system provides a more enjoyable user experience for the team.

1] Portalink receives daily .CSV product data files via SFTP from Legrand's Product Information System.

2] Portalink receives real-time pricing and inventory files via API from Legrand's Product Information and ERP systems.

3] Portalink receives high frequency quote updates via .XML files via SFTP from Legrand's Internal Quote system.

4] Portalink sends EDI purchase order files via SFTP to Legrand's ERP system.

5] Portalink sends copies of PDF orders via SFTP to Legrand's Salesforce CRM system.

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Customer Service spent too much time on non-productive activities.

Fixing errors and manually entering data are non-value add tasks that rob the customer service team of valuable time to perform more important communication tasks that generate more sales.

Portalink eliminates manual entry of orders, searching for information and filing of paperwork.

The system works like a Virtual Assistant, enabling the team to only focus on discrepant order lines with auto-prompts for quicker and more accurate decision making. Orders in Portalink are archived indefinitely and can be accessed effortlessly with dynamic search filters.

The Customer Service Team is empowered.

Portalink is designed to free up time for more important customer-facing activities that build customer satisfaction and grow sales.

Portalink has automated 33,367 lines of data (an average of 556 lines per day) that would have otherwise required manual processing.

Portalink auto-flagged 13,777 lines of data that had a discrepancy (an average of 230 per day).

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Multiple legacy systems and processes evolved over decades.

It was difficult to achieve any further KPI improvements with the existing infrastructure. Having data siloed in multiple systems makes it harder to measure KPI's or generate reports quickly. credit status etc.

Portalink compliments existing systems and processes.

Portalink leverages the strengths and weaknesses of existing systems and workflows in a way that positively re-defines the way to measure KPI's.

Having the transactional and relational data in Portalink empowers the system to provide deeper Business Intelligence Reporting in real time.

During the scoping for the project all necessary data-points and business rules were carefully considered. Portalink is able to use the data from Legrand's ERP, PIMs, CRM and Quote systems in a single, intuitive user interface.

The Portalink Dashboard provides a dynamic filter which empowers management to access real-time reports for user activity, customer activity and transactional efficiency.

Legrand Australia are redefining their KPI's for Customer Service now that the team is no longer required to check and enter every line of every Purchase Order.

With Portalink, only the lines that are discrepant need manual intervention.

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Important customer requests often get overlooked.

The inconsistent formats and considerable information on each Purchase Order and covering email makes it easy for the human eye to miss important comments and requests such as 'urgent' or 'pick-up' or 'air freight' etc, increasing the likelihood of mistakes that cause customer dissatisfaction.

Portalink is configured to find critical keywords within each order and email.

When the system finds a keyword, such as 'Pick-Up', it automatically forwards that order to a 'Pick-Up' priority folder to ensure that the order is processed with the level of urgency required and customer deadlines are achieved.

Customer satisfaction improves.

The Customer Service Team cherry picks from the Dashboard folders to ensure that orders are processed according to the correct level of priority as instructed by the customer. Fewer special requests slip through.

Legrand has four main keywords: LAS (Air), LUP (Pickup), LRR (Bunnings-specific) and LRE (Standard-type). 18 orders were auto-detected for airbag delivery; 231 orders were auto-detected as a pickup order. These orders were processed at an average time of 02:48 per order.

An additional 531 orders were flagged as discrepant not specific to any line item (i.e., customer hold, order has special product codes requiring checks, or order below minimum-order value).