



## CASE STUDY

# How automated systems can completely change the way reporting is done in a manufacturing sales process

### Quick Summary

For a dairy product manufacturer there were problems like inconsistent data in SAP master data, the need for extra Excel files, a lot of data validation for combining historical and real-time transaction data, and issues reconciling old and new SAP data, CRG Solutions was able to improve the accuracy and timeliness of sales reports, cut down on manual work, and make strategic planning better. This shows how automated systems can completely change the way manufacturing sales reports are made.

### About the Customer

A prominent Indian dairy product manufacturer based in Uttar Pradesh, operating over 200 outlets and offering a wide range of products, identified a requirement to automate the sales process. The organization recognized the need to streamline data integration, enhance report accuracy, and enable real-time access to sales data for improved decision-making.

### Problem Statement:

The dairy product manufacturer needed a solution to address the following challenges they were currently facing: It involved their sales reporting process.

- **Manual Reporting:** The manual preparation of sales reports resulted in time-consuming processes and potential errors.
- **Data Mapping Issues:** Manual data preparation and maintenance were required for mapping sales data, making the process inefficient.
- **Partial Automation:** Previous use of R programming for final report generation in Excel offered limited automation, resulting in dependency on manual checks and human intervention.

## CRG Solutions - CASE STUDY

### Solution:

CRG Solutions identified the following objectives for improvement in the dairy product manufacturer's reporting process.

- Automate Sales Reporting: Develop an automated system to eliminate manual errors and reduce the time required for report generation.
- Enhance Data Accuracy: Implement a solution to provide accurate and timely sales data to management, facilitating informed decision-making.
- Improve Data Integration: Integrate data from various sources, including SAP and Excel, to create a unified reporting system.

CRG Solutions implemented a comprehensive automated solution for daily and weekly sales reporting:

- Sales Data Mart Implementation: Developed using an SQL database to automate data loading and reporting.
- Data Source Integration: Used SAP for sales transactions and Excel for mapping sales to employees and tracking targets.
- Tableau Visualization: We used Tableau to automate the generation of insightful daily and weekly sales reports.

The implementation involved the following Tableau tools:

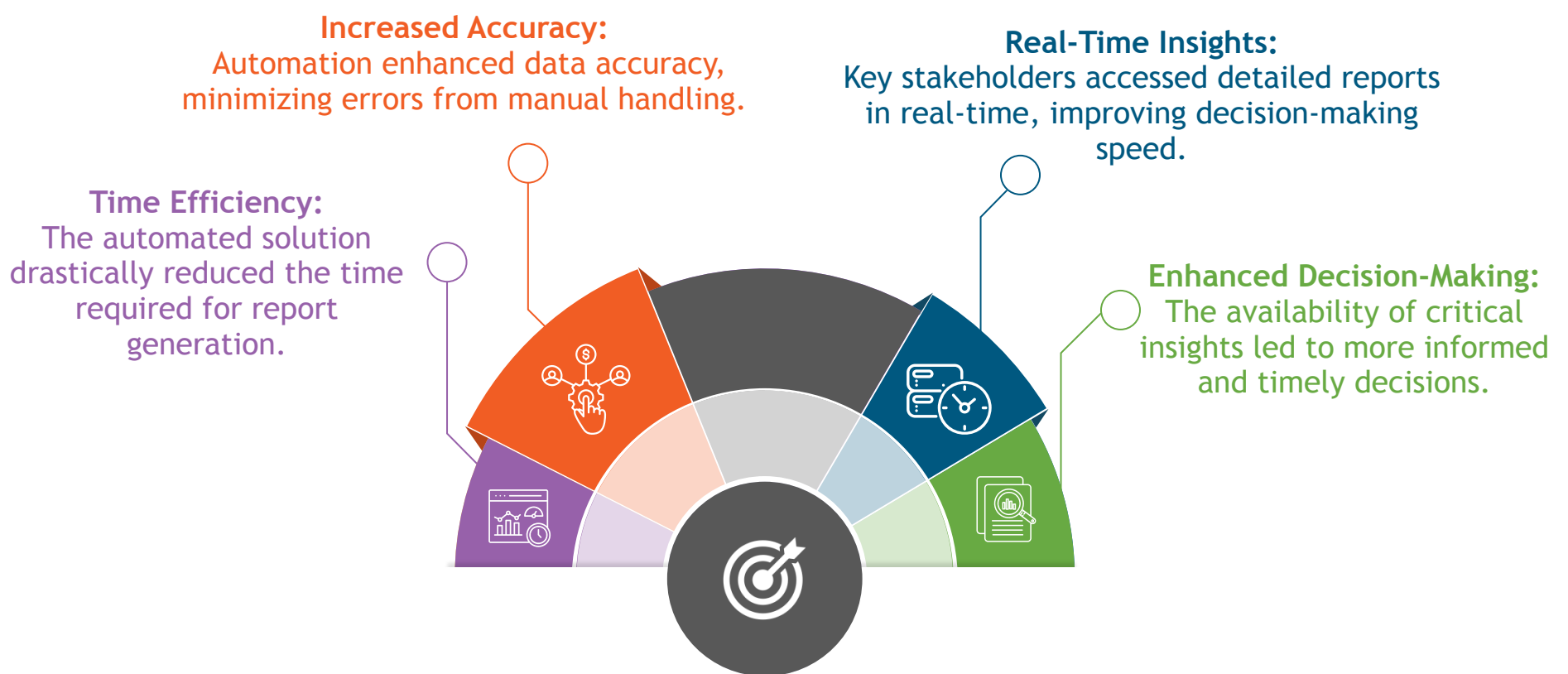
- Technology Stack: Utilized SQL DB for data storage, SSIS for data loading, and Tableau for visualization.
- Development and Customization: We created customized dashboards that reflected current sales reports and included metrics like sales quantity, targets, and employee performance.
- User Training: Provided comprehensive training to ensure the client's team could effectively use the new system.

## CRG Solutions - CASE STUDY

The sales reporting process was automated, resulting in significant improvements:

- **Integrated Sales Data:** We effectively integrated sales and master data from SAP, managing additional data mapping using Excel.
- **Enhanced Reporting:** Real-time, accurate reporting enabled quick access to critical sales data, significantly improving the decision-making process.
- **User Interface Improvements:** Implemented Tableau Online, which provided an intuitive interface for end-users, featuring drill-down capabilities and flexible analysis options.

### Business Benefits:



*A Trusted Solution Partner*

*to achieve*

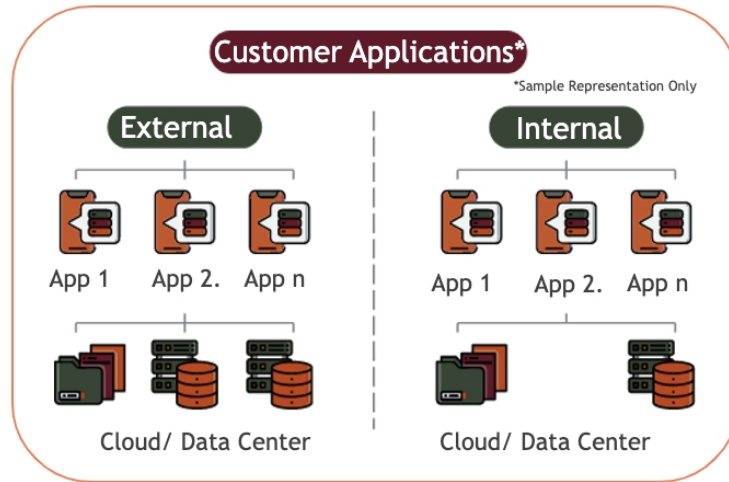
*Business Excellence*

# About CRG solutions

## We Cover

### Analytics

We setup practices, tools to derive insights (customers, products, apps, teams) to enhance or optimize business effectiveness with the help of products like Tableau, Alteryx, PowerBI, Cloud and MLOPs



### RPA

We automate all high volume and mundane tasks to reduce manual errors and to increase efficiency with the help of products like AA (Automation Anywhere), Yellow.ai

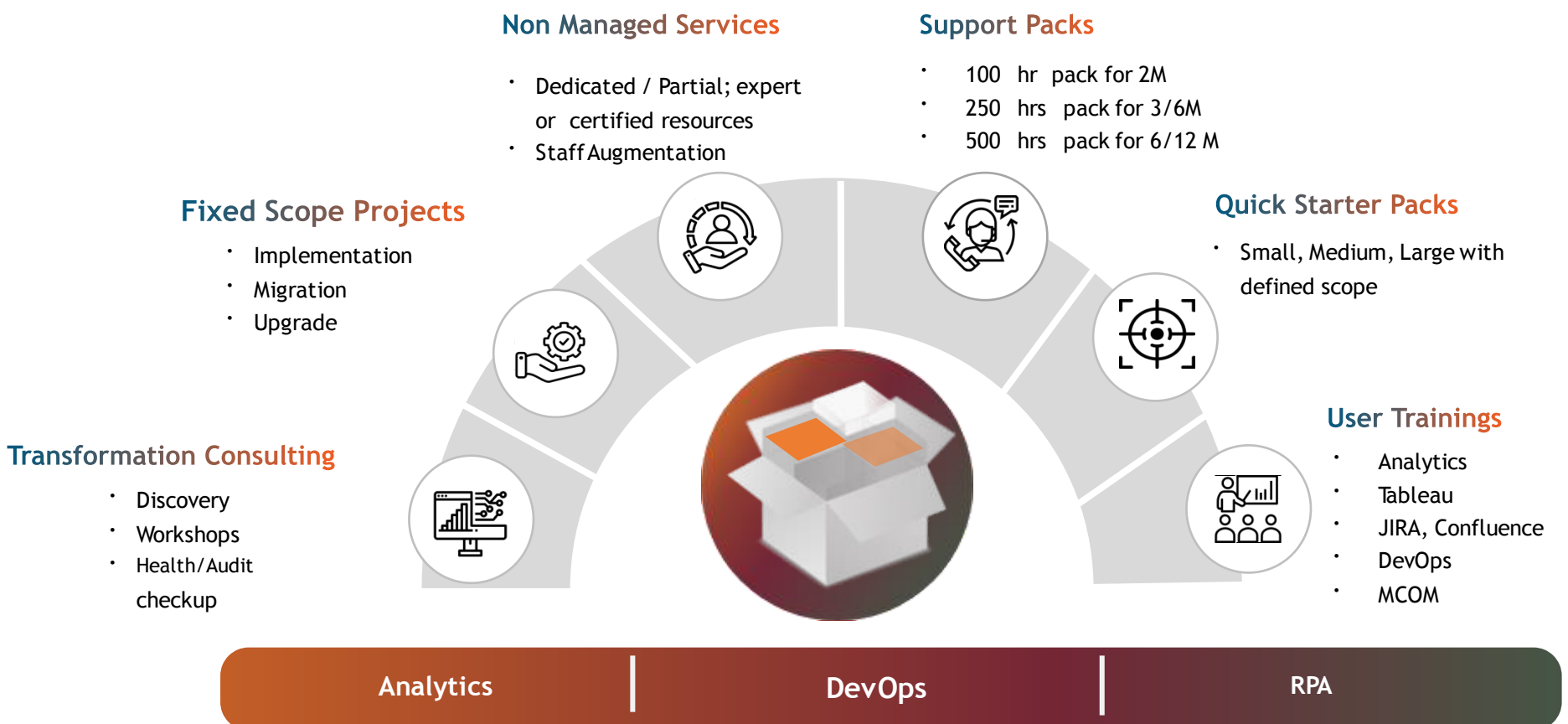


### DevOps

We help streamline the application development and maintenance processes with custom project management practices and implementation of world class software tools like JIRA, Azure DevOps, Azure Cloud to improve team productivity



## Services Portfolio



### Our Socials



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