



Case Study: Streamlining Procurement Processes with Autopilot. A Talksure Success Story

Talksure is a financial services provider for the South African and International markets, with over 1200 employees, based in Umhlanga, South Africa.

Despite the successful implementation of a new ERP system, Talksure faced some challenges with the procurement module which was unable to fully adapt to the company's needs:

CHALLENGES

The form was not user-friendly for non-finance/occasional users, often resulting in errors.

The workflow process was rigid, didn't allow for the approval steps they wanted and often resulted in manual intervention and rework, leading to inefficiencies and user frustration.

Managers had to log into to the finance system to approve, which often resulted in delays.

Costly licenses were required for users who only needed to request or approve purchases.

Greenlight worked with Talksure's finance and procurement teams to implement a seamless process which starts with the Autopilot Workflow app in Microsoft Teams, where users can easily request and approve purchases, and ends with integration into their ERP system, using Microsoft Power Automate, to create approved Purchase Orders which are automatically sent to the requester as a PDF.



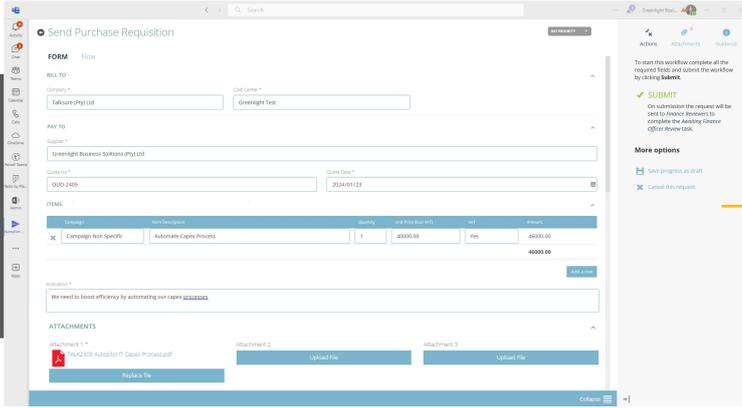
TALKSURE

Kathryn Schuster

HEAD OF FINANCE

"The Autopilot solution not only met but exceeded our expectations. What used to be a rigid and time-consuming process is now streamlined and efficient. The implementation by Greenlight was impressively smooth, and the users have adapted quickly, thanks to Autopilot's user-friendly design and integration with Teams. The ease of implementation and the immediate benefits we observed, have made us eager to expand our use of Autopilot to other processes in the organization."

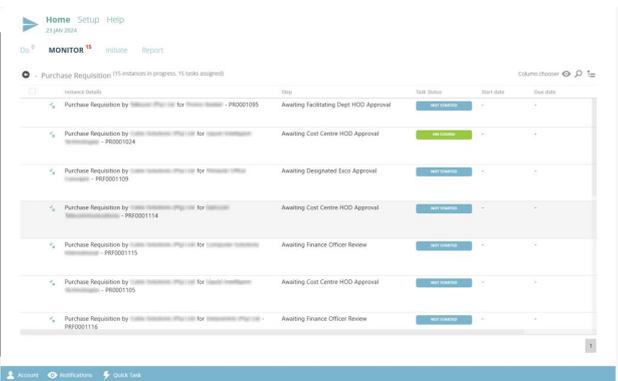
THE SOLUTION



A **user-friendly interface** for users, right inside Teams.

A more **flexible and efficient workflow** process.

Approval steps which are fully aligned to their business structure.



Audit compliance - Role-based access and approvals, and a complete audit trail

A **reduction in ERP license costs** for users who only need to request/ approve purchases.



Reduce **Risk**



Ensure **Accountability**



Increase **Efficiency**

THE RESULT



TALKSURE

Kathryn Schuster

HEAD OF FINANCE

Increased flexibility

Higher user satisfaction

"Having a more user-friendly tool, that is flexible enough to run in line with our business needs, has led to considerable time savings for our team, which will inevitably result in cost benefits."

Less time spent on rework and manual steps

"What we like about Autopilot is the fact that it could be customized to the way we wanted our workflow to run. One of our favourite elements is being able to send it back at any point in the workflow, without having to cancel the transaction. Previously we had to go via email conversations, or call the users, then fix it ourselves for them or cancel it and reinitiate. It was so tedious!"

Quicker mobile-friendly approvals

"We already do most of our communication via Teams, so being able to interact with the system in Teams, is a huge improvement in terms of convenience."

Improved reporting

"I like the reporting we are able to do from Autopilot - I need to approve payments at the end of the month and having everything on one page gives me my answers faster."

Positive implementation experience

"It was a fantastic experience working with the Greenlight team. It was very simple - they communicated well and delivered exactly what they said they would, when they said they were going to deliver. I can't ask for better than that."

Interested in streamlining your procurement, or other business processes?

Visit us on the web, or contact sales@greenlightsolutions.co.za

greenlightsolutions.co.za | autopilotworkflows.com