Automation Intelligence Advisory Service
for all businesses

CASE STUDIES

HBᵀ Get Curious. Discover Better.

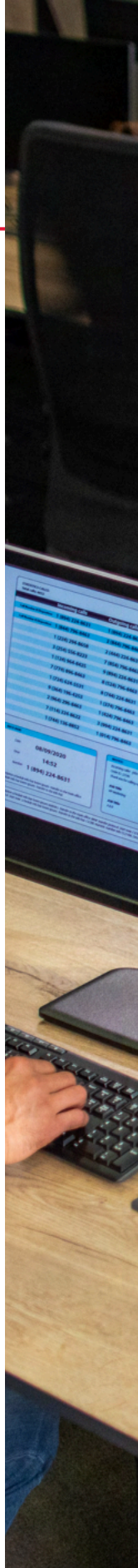# Table of Contents

Introduction

"Work smarter, not harder" has become a bit of a cliché these days, but as with most clichés, it is grounded in truth. Are you and your business working smarter, or are you so busy working hard that you're potentially missing opportunities to do things better?

Sometimes you need a **fresh perspective** to help you spot inefficiencies and find different ways of working. Something as simple as eliminating a manual and time- consuming process can have a dramatic effect on your business.

EXAMPLE: Implementing an automated workflow that **saves someone 30 minutes a day**, not only **eliminates 10 hours a month** of wasted productivity, it frees up time for that person to get something else done and also **improves morale** by removing a repetitive task they didn't want to be doing. *That's just one person, what about that multiplied by ALL of your employees?*

Case Study **Details**

1 **Aged Care** **Service Provider**

The Project:
Maintenance & Repairs List + SharePoint

The brief: Required a solution to log and track maintenance and repair jobs for the villas.

HBT's Solution:
Microsoft Forms is used for staff to log jobs, & jobs are saved in a SharePoint list. When jobs are logged, an alert is sent to the maintenance manager who assigns the job to the right person. **Alerts get sent when jobs are overdue**. **The list of jobs is now published on a SharePoint page where you can see jobs assigned to individuals, jobs per village and other views.**

2 Food **Manufacturer**

The Project:

Customer Application Form with DocuSign Integration

The Brief:

This project was used to replace a paper-based system where customer application forms were printed out and sent to sales people all over the country. The forms would be taken to customers, signed, scanned and emailed back.

The HBT Solution:

A Power App was published on SharePoint that allows the sales person to enter an email address and choose a form type. Once submitted, a DocuSign form is sent to the customer. Once signed digitally by the customer the form goes straight to the appropriate mailbox to be processed and the data entered in the form is **automatically captured for import into the ERP.**
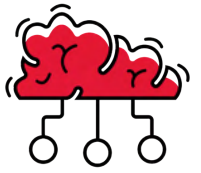
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Education Sector

The Project:
SharePoint and Document Approval Workflow

The Brief:
An intranet for published documents, calendars, forms, templates, news etc as well as a shared document management system for creating content.

The HBT Solution:
A staff hub site in SharePoint was created for the whole company including the educational facilities. For the office staff, each department has their own site for document creation. **An approval workflow and version management system** is in place so documents can be submitted for approval and once approved, **automatically converted to PDF and published to the intranet. This is important for ERO compliance and child safety.**

4 Beauty Products **Manufacturer**

The 1st Project:
Automatic Publishing of Sales Data to Teams

The Brief:
A person in the office would refresh data in some Excel tables, screenshot the data and email it to the staff on a daily basis. They required a more automated way to achieve this.

The HBT Solution:
An Excel macro was created which automatically created a screenshot of the tables and copied these to OneDrive. **A Power Automate workflow would then pick up these report images and post them to a Teams Channel.**

The 2nd Project:
Automated Merge of Several Purchase Orders, Cleanup and Transformation of Data

The Brief:
Once a week a staff member would receive several purchase orders as CSV attachments. They would manually append the CSV files into a separate spreadsheet and delete unrequired columns. They would then replace values in the file with other predefined values, save the file to be imported into their ERP.

The HBT Solution:
A Power Automate would automatically save the purchase orders as they arrive in the inbox and save them to a folder.

The user would open Excel and run a macro that would pick up the exported files and automatically merge the files, remove the columns and update the values within seconds. **This saves almost a day a month of time.**

5 Homeware Retail Chain

The Project:
App for Generating Signed Contracts

The Brief:
When customers make a purchase on finance, an agreement document was manually signed, scanned and emailed to finance.

The HBT Solution:
An app was created that runs on a tablet. The salesperson fills out the details, shows the contract to the customer who digitally signs the document. The salesperson also signs the document. The document then gets converted to PDF, embedding all the fields and signatures, saves it in SharePoint and emails it to finance.

⑥ Accountancy **Firm**

The Project:
Power BI Reports on Health & Safety Data for Staff and Contractors

The Brief:
The current HSMS does not do adequate reporting and another solution was needed for reporting on Health & Safety incidents and related information.

The HBT Solution:
Dozens of Power BI dashboards were created to report on different aspects of the H&S data. These reports are published to SharePoint and sent out to staff to view.

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Food and
Beverages

The Project:
Reporting on Sales Data, Accumulating Data from Different Sources
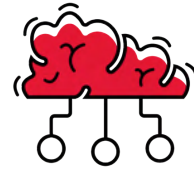
The Brief:
Report on sales statistics from various systems.

The HBT Solution:
Power BI was used to transform data from a number or sources. Power Automate grabs CSV files from email attachments and saves to SharePoint. Power BI connects and transforms this data and merges it with other data that is taken from Dynamics NAV. **The data is then presented in several report dashboards to analyse sales statistics.**

Technology
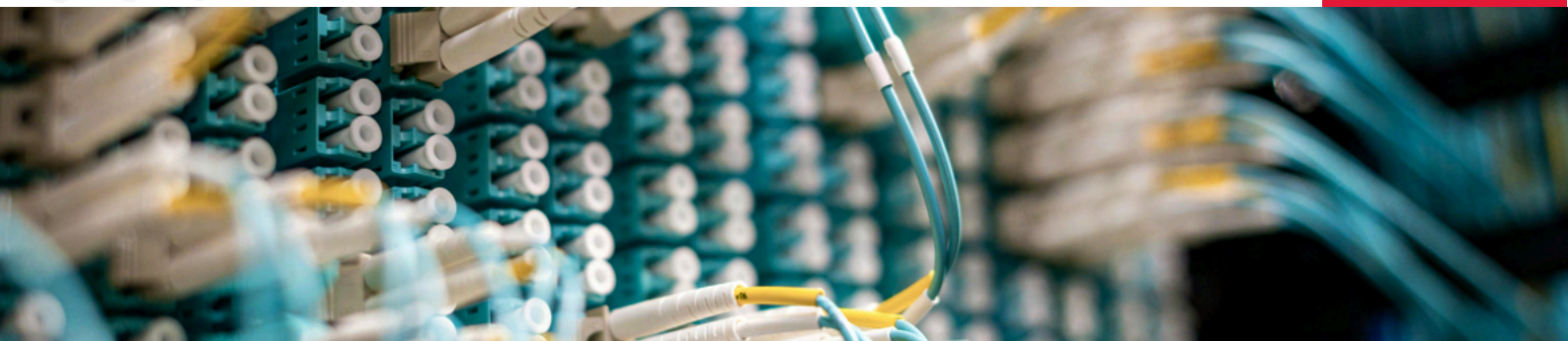# Service Provider

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The 1st Project:
Sales App for Recording Sales, Products Sold, Key Contacts, Producing Contracts, and Submitting PPSR Records to the Government Website

The Brief:
Replace a partially digital process of collecting information relating to sales and device installs.

The HBT Solution:
An app that sales staff, finance and installers use to collect sales info, PO info and pricing calculators as well as device info and key contacts. Once all the information is gathered, **the app can generate contracts based on different templates** depending on the items being sold and the contract terms. Leased items can then be submitted to the government PPSR (Personal Properties Securities Register) **website via API automatically.**

Project 2:
Daily Reporting/Alerts via API from Different Systems (PSA, RMM, Meraki Portal)

The Brief:
Important information from various systems needs to be reported on and/or alerts need to be sent via Teams and/or email. These include items that have forgotten to be billed in the ticket management system, alerts for offline equipment in different portals, automatic ticket generation for back up reports, calendar integration for projects among other things.

The HBT Solution:
Power Automate was used to create workflows using various methods to talk to the external data sources and send alerts, create Teams messages and posts and update calendars.

Project 3:
Synchronising Employment Hero Leave Calendars with SharePoint

The Brief:
Each department has its own calendar in Employment Hero. Anniversaries also has a separate calendar. This makes it hard to get a global overview of all the leave and anniversaries in one place.

The HBT Solution:
All calendars are merged into one and synchronised using Power Automate and displayed on the SharePoint intranet.

Project 4:
Digitise All of the Organisation's Paper Forms.

The Brief:
Digitise all paper forms and add workflows.

The HBT Solution:
Forms were created and workflows would do things like send emails, attach data to lists, approval workflows. Some examples of forms are:
- Site survey form
- Stationery request
- Shopping list
- Catering request
- Customer account application (integrates with DocuSign)
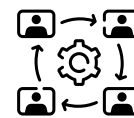- New user, user exit forms

About HBT's **Automation Intelligence Advisory Service:**

Process Automation
Automate routine tasks to reduce manual effort, improve accuracy, and free up time for strategic initiatives.
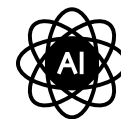
Workflow Optimisation
Streamline workflows across departments, enabling smoother collaboration and faster turnaround times for essential processes.

AI Readiness Assessments
Assess your organisation's readiness for AI integration with a comprehensive evaluation that identifies areas of opportunity and foundational steps.

AI Implementation for Back-Office Automation
Automate repetitive back-office tasks using AI, enhancing operational efficiency, and allowing your team to focus on high-value work.

Data Analytics & Power BI
Unlock insights within your data with our analytics & business intelligence services, including Power BI dashboards that transform raw data into actionable insights.

PowerApps Development
Build custom apps that support your unique processes, from data collection to workflow management, tailored to meet specific business needs.

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"Working with HB Technologies has been an absolute delight! Their expert advisory services have **helped us automate many of our manual processes using tools we already had.**
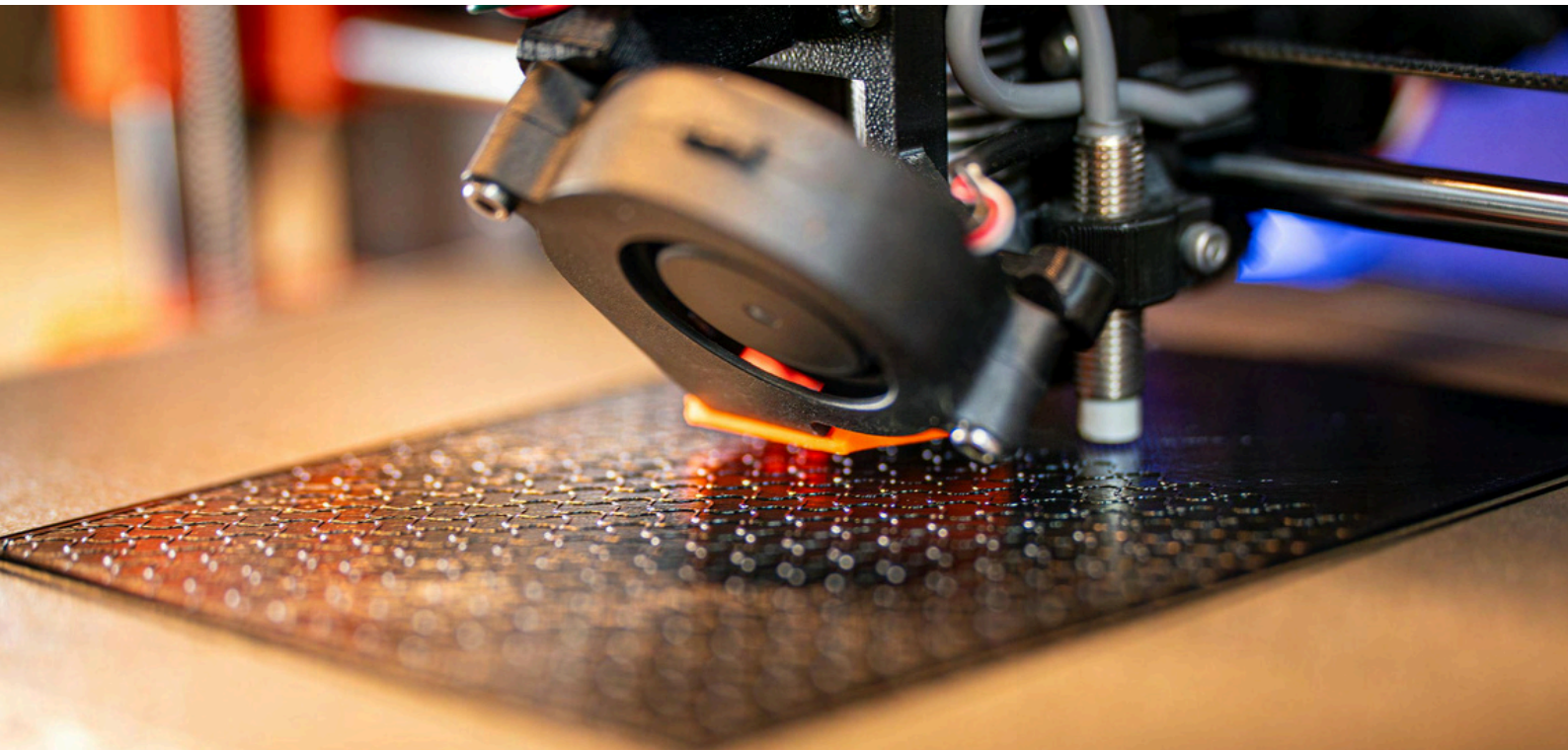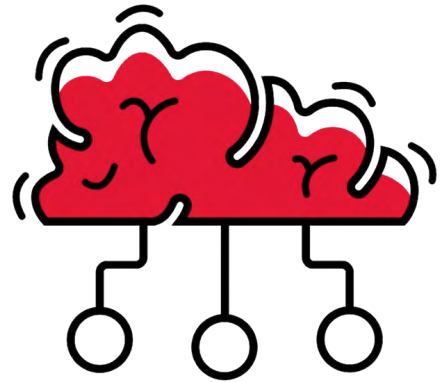
This has saved us so much time and allowed us to focus on more valuable tasks. Plus, their team is incredibly easy to work with and truly knows their stuff. We're thrilled with the results!"

My Project List

To discuss how your business can benefit from automation intelligence, **contact us today:**

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