



Driving Operational Efficiency through Intelligent Automation in IFS ERP

A Case Study by Enterprise Software Solutions Inc. (ESS) Demonstrating
Process Automation and Supplier Optimization for a National Service
Leader

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Executive Summary

The client, a leading national service provider specializing in dock and door solutions for commercial and residential customers, sought to streamline its supplier coordination and automate internal transfer processes within IFS ERP.

As part of its ongoing commitment to innovation and excellence, **Enterprise Software Solutions Inc. (ESS)** implemented a targeted automation solution that enhanced supplier dispatching, optimized transfer shipment handling, and improved operational visibility through custom-built API integrations.

The project's success demonstrates ESS's capability to deliver measurable business impact through IFS ERP optimization — supporting ESS's objective of advancing from **Gold to Platinum Partner** status within the **IFS Partner Network Program**.

Key Highlights:

- **Automated Transfer Process:** Fully automated transfer shipment logic using an Interactive API session, eliminating manual intervention.
- **Supplier Dispatch Enhancement:** New Subcontractor Dispatch interface introduced to streamline workforce allocation and subcontractor coordination.
- **Outcome:** Achieved improved efficiency, reduced processing times, and greater control over supplier operations and transfer management.

Business Challenge

The client's operations depended heavily on efficient supplier coordination and real-time inventory transfers between locations. However, several manual bottlenecks impacted throughput and data accuracy.

Key Challenges:

1. **Supplier Management Inefficiency:** Assigning the right supplier for specific tasks required manual review and coordination, often leading to delays.
2. **Transfer Shipping Delays:** Transfers in the **OUT4DEL bin** were handled manually, consuming valuable operational time.
3. **Accuracy and Control:** Shipping automation had to ensure only eligible transfer lines (those in the OUT4DEL bin) were processed, preventing unintended shipments.
4. **Visibility and Tracking:** Management needed a unified reporting view showing the status, timestamps, and completion metrics for all transfer orders.

These challenges highlighted the need for an **integrated automation framework** that could run reliably without user input, improve accuracy, and deliver transparent, real-time visibility.

Solution

ESS designed a comprehensive automation solution that integrated seamlessly into the client's existing IFS ERP environment.

Core Solution Components:

1. Subcontractor Dispatch Page:

- Developed a new IFS page to centralize supplier assignment and dispatch operations.
- Streamlined filtering and assignment logic based on location, workload, and proximity.

2. Transfer Shipping Automation via Interactive API:

- Built a backend automation job to perform transfer shipping actions automatically overnight.
- Replicated user session logic using Interactive API sessions — ensuring functional parity with manual processes while operating unattended.

3. Bin-Level Validation Rules:

- Implemented validation logic to ensure only transfer lines located in the **OUT4DEL bin** were shipped.
- Maintained data integrity by excluding any unrelated transfer lines from the automated job.

4. Comprehensive Reporting:

- Developed a post-job reporting framework showing success/failure status, timestamps, and bin details.
- Integrated reporting directly into the **ESS Portal** for on-demand user access.

5. Reprocessing Functionality:

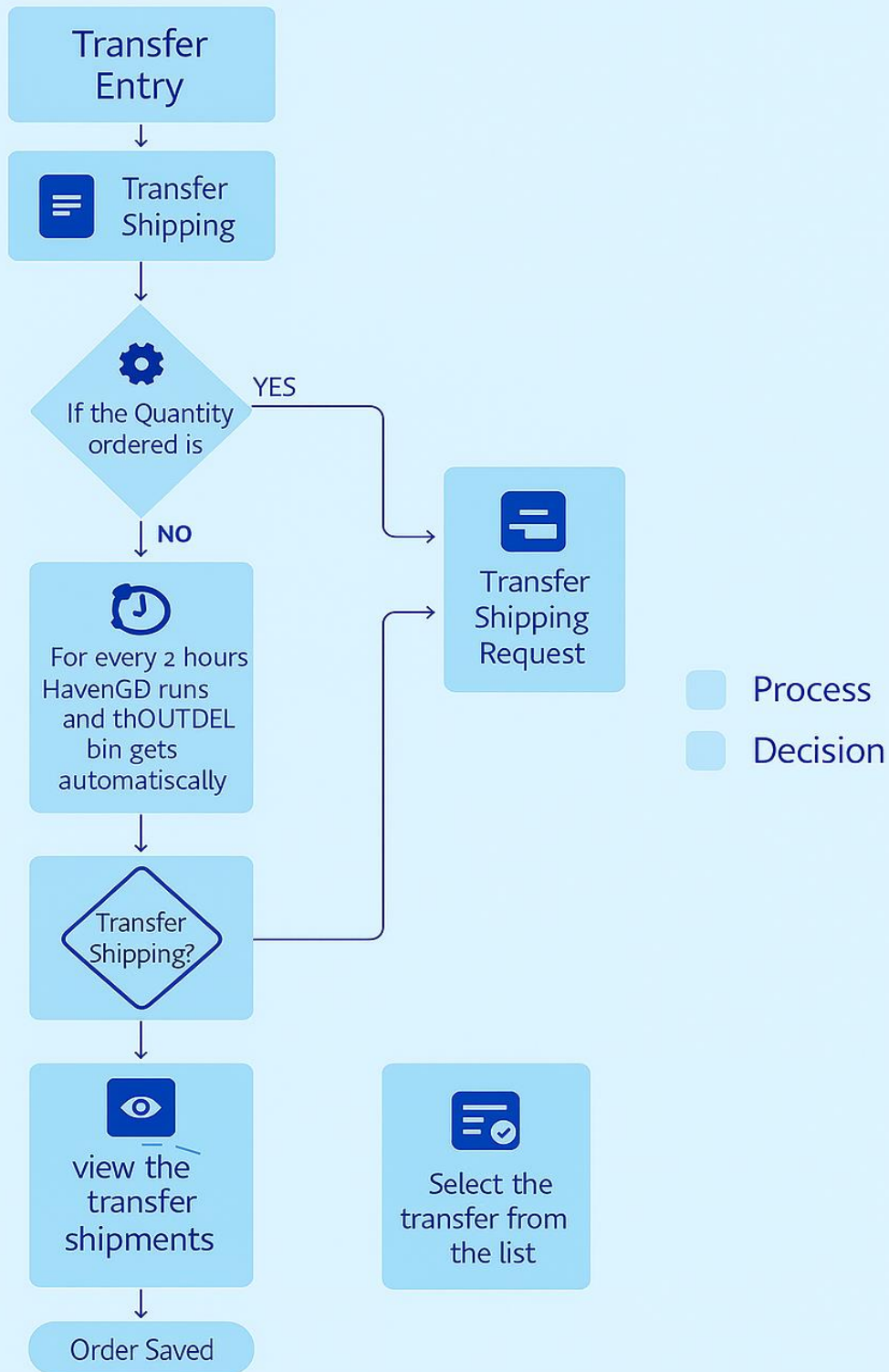
- Enabled users to re-trigger failed transfer jobs directly from the ESS Portal interface, ensuring continuity and minimal downtime.

Key Innovation:

Leveraging IFS Interactive API sessions to automate critical logistics operations while maintaining full audit control and flexibility.

FLOW CHART

Transfer Shipping Automation Process



Implementation

The implementation followed a structured, phased approach designed to minimize disruption to daily operations.

Implementation Phases:

1. Design and Validation:

- Collaborated with client stakeholders to map existing transfer and dispatch workflows.
- Defined business rules for bin-level transfer identification and automation triggers.

2. Development:

- Configured Interactive API-based scripts to emulate user actions within the Transfer Shipping interface.
- Created the Subcontractor Dispatch page, integrating supplier selection logic with real-time ERP data.

3. Testing and Simulation:

- Conducted sandbox simulations to ensure transfers within the **OUT4DEL bin** were accurately processed and others safely ignored.
- Validated overnight automation reliability and session recovery under multiple conditions.

4. Deployment:

- Rolled out the automation to production with nightly job scheduling.
- Integrated reporting and reprocessing features into the ESS Portal for operational teams.

5. Training & Handover:

- Delivered end-user training and documentation.
- Established maintenance and monitoring routines to ensure long-term system stability.

Results / Metrics

The project achieved significant measurable improvements in operational performance and process reliability.

Quantitative Outcomes:

- **90% Reduction** in manual transfer processing time.
- **100% Accuracy** in processing transfers from the specified OUT4DEL bin.
- **Improved SLA Compliance**, with overnight processing ensuring next-day readiness.
- **Zero Downtime**: Automation integrated seamlessly with existing ERP operations.

Qualitative Benefits:

- **Enhanced Supplier Collaboration**: Real-time dispatching reduced communication delays.
- **Increased Productivity**: Freed up operational staff for higher-value tasks.
- **Greater Transparency**: Management gained full visibility into transfer execution through automated reporting.
- **Scalability**: The framework can easily accommodate future process expansions or additional bin rules.

Lessons Learned / Best Practices

Automate with Precision: Define explicit filters (like bin-based logic) before implementing unattended automation.

Leverage APIs for Resilience: Interactive API sessions ensure automation mirrors manual processes securely and efficiently.

Maintain a Human Oversight Layer: Even with automation, reporting dashboards and manual reprocessing options are vital for quality assurance.

Align Technology with Process: Success depends on aligning ERP automation with clearly defined business rules and operational goals.

Continuous Monitoring: Set up periodic review and log analysis to identify trends, anomalies, or process bottlenecks early.

About ESS

Enterprise Software Solutions Inc. (ESS) is a premier enterprise resource management (ERP) implementation and support company, recognized for delivering successful projects across **manufacturing, distribution, and service** verticals for over **15 years**.

As a dedicated **IFS Gold Partner**, ESS specializes in comprehensive ERP implementation and migration services across **manufacturing, construction, and service** sectors.

Core Services and Expertise

ESS offers complete, end-to-end ERP services, including:

- Full-cycle ERP implementation — from IFS Cloud licensing and customization to deployment support across service, manufacturing, and finance modules.
- Post-implementation support and managed services.
- Seamless third-party integration using APIs and middleware.
- Robust data migration and transformation solutions.

With **over 50 years of combined team experience**, ESS has successfully implemented and customized ERP systems for industries including **service, engineering, manufacturing, and distribution**.

ESS also has deep expertise in **Epicor P21 ERP** implementation.

Technical Proficiency

ESS is widely known for its ability to:

- Bridge legacy and modern ERP platforms — synchronizing systems like IFS and Baan.
- Leverage deep technical knowledge in **RESTful APIs** and **IFS customization**.
- Develop proprietary extensions around **Microsoft, SAP, BAAN**, and **IFS** technologies.
- Enable **predictive maintenance** through IFS ERP implementations.

Mission and Focus

ESS's mission is to reduce client risk by ensuring **flawless, on-time delivery** through proven experience, technical innovation, and proprietary extensions.

We help organizations overcome challenges such as:

- Growth bottlenecks and scalability limitations.
- Risks from end-of-life or unsupported legacy systems.
- Manual, error-prone customer integrations.
- Rising operational costs from outdated technologies.

By combining strong industry expertise with modern ERP innovation, **ESS ensures every client's investment delivers a long-term strategic advantage**.

Global Presence

ESS operates globally, with offices located in **Kansas (USA)** and **Hyderabad (India)**.