Automation Use Cases
Per Industry

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Retail

Automation targets high-volume administrative tasks and data flow between disparate systems.

Rank	Process to Automate	Technology Focus	Benefit & Goal
1	Invoice & Accounts Payable (AP) Processing	RPA / IDP (Software-based document capture)	Automatically extract invoice data, perform three-way matching (Invoice-PO-Goods Received), and initiate payment runs in the ERP system.
2	Customer Refund and Exchange Processing	Workflow Automation	Guide agents and systems through a standardised, multi-step process for approvals, credit note issuance, and inventory adjustments for returns/refunds.
3	New Vendor/Supplier Onboarding	Workflow Automation	Automate the collection of supplier banking details, FICA documents, contract generation, internal approval routing, and system setup in the financial ledger.
4	Back-Office Reporting & Data Aggregation	RPA	Automatically log into various financial and operational systems (sales reports, labor tracking) to compile, format, and distribute daily/weekly management reports.

Finance and Banking

Automation focuses on compliance, speed, and accuracy in high-risk, rules-based environments.

Rank	Process to Automate	Technology Focus	Benefit & Goal
1	KYC & Client Onboarding/FICA Compliance	RPA / Workflow Automation	Automatically collect client documents, verify information against regulatory databases (e.g., sanction lists), and route exceptions to the compliance officer for review.
2	Transaction Reconciliation & Error Resolution	RPA	Automatically match high volumes of daily transactions across internal and external systems (SWIFT, payment gateways), logging in to resolve simple exceptions or flag complex ones.
3	Loan/Credit Application Processing	RPA / Workflow Automation	Automate the initial data capture, credit score pulling, rule-based screening, and routing of the application to the correct underwriter based on risk profile and loan amount.
4	Regulatory Reporting	RPA	Automatically access and extract required data from core banking systems, format it according to central bank or regulatory standards (e.g., SARB), and upload the final submission.
5	Customer Dispute Resolution (e.g., Debit Orders)	Workflow Automation	Standardise and track the process for investigating, confirming, and resolving customer queries regarding unauthorized transactions or incorrect debit orders.

Agriculture

Focuses on the administrative back-office supporting farming operations, sales, and logistics.

Rank	Process to Automate	Technology Focus	Benefit & Goal
1	Harvest Planning and Field Work Order Creation	Workflow Automation	Route field data (e.g., expected yield/readiness) through the system to automatically generate work orders for labor teams and equipment, ensuring timely harvest execution.
2	Labor Time Sheet & Payroll Processing	RPA	Automatically collect labor hours from attendance systems (biometrics/app), validate against work orders, and input data into the payroll system, ensuring compliance and accurate wage calculation.
3	Input Procurement & Inventory Management	RPA / Workflow Automation	Automatically track fertilizer/pesticide stock levels, generate purchase requests when needed, and route them for managerial approval before placing the order with the supplier.
4	Farm Financial Reporting	RPA	Aggregate financial data from the farm management system and accounting software to create monthly/quarterly reports on costs per hectare, profit margins, and budget vs. actuals.
5	Compliance Documentation & Audits	RPA	Compile necessary historical data (e.g., spray records, water usage logs) and documents required for audits, certifications (e.g., GlobalGAP), or government grants.

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Government

Targeting improvements in speed, transparency, and citizen/internal administrative efficiency.

Rank	Process to Automate	Technology Focus	Benefit & Goal
1	Permit/License Application Processing	Workflow Automation	Automate the multi-step approval, review, and notification process for various public services, ensuring applications don't get stuck and citizens are kept informed.
2	Procurement & Vendor Invoice Matching	RPA / Workflow Automation	Automate the validation of vendor invoices against issued purchase orders and goods/services received, flagging discrepancies to reduce payment errors and potential fraud.
3	HR and Personnel Administration (e.g., Leave, Claims)	RPA / Workflow Automation	Automate the submission, review, approval routing, and system updating for employee leave requests, travel claims, and internal transfers.
4	Citizen Service Requests (e.g., Municipal Helpdesk)	Workflow Automation	Automate the intake (from email, web form, phone log), classification, and routing of citizen requests (e.g., municipal faults) to the correct department for resolution tracking.
5	Budget Monitoring and Reporting	RPA	Access various departmental financial systems (often legacy systems) to extract and consolidate budget vs. actual expenditure data for monthly submission to the finance ministry.

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Manufacturing

Automation focuses on administrative bottlenecks in the order-to-cash and procure-to-pay cycles.

Rank	Process to Automate	Technology Focus	Benefit & Goal
1	Sales Order Entry & ERP System Setup	RPA	Automatically receive sales orders via email or EDI, validate customer details, and input the order accurately into the ERP (Enterprise Resource Planning) system, reducing manual data entry errors.
2	Bill of Materials (BOM) Comparison & Updating	RPA	Automatically compare engineering BOMs with production BOMs across systems and flag or update discrepancies when design changes are implemented.
3	Supplier Order Placement & Follow-up	RPA	Based on inventory and production schedules, automatically generate purchase orders for raw materials and send automated follow-up emails to suppliers for delivery confirmations.
4	Production Downtime Reporting	RPA	Collect log data from manufacturing execution systems (MES) or manual logs to categorize downtime reasons, calculate efficiency metrics, and generate reports for the management team.
5	Quality Assurance Documentation	RPA / Workflow Automation	Automate the collection and archiving of quality test results, batch certificates, and compliance documents for audit purposes.

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Renewable Energy

Automation targets administrative processes related to billing, finance, and regulatory compliance.

Rank	Process to Automate	Technology Focus	Benefit & Goal
1	Customer Meter Reading & Billing Cycle	RPA / Utility Billing Software	Automate the extraction of consumption data from smart meters (or other data sources), apply complex tariff rules, and generate invoices for Independent Power Producers (IPPs) or end-users.
2	Regulatory Data Submission & Reporting	RPA	Access and extract critical generation, availability, and curtailment data, format it according to the requirements of the grid operator (e.g., Eskom) or NERSA, and submit reports.
3	PPA (Power Purchase Agreement) Revenue Reconciliation	RPA	Automatically compare generated energy data against PPA terms and reconcile expected revenue with actual payments received, flagging deviations for investigation.
4	New Connection/Site Commissioning Workflow	Workflow Automation	Standardize the multi-stage process for bringing a new site online, including internal approvals, grid operator notification, and final documentation sign-off.
5	Contract Lifecycle Management for Maintenance	Workflow Automation	Track all vendor maintenance contracts, send automated alerts for renewal/expiry, and route internal approval requests for new or updated service agreements.

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Healthcare

Automation focuses on accelerating the revenue cycle and easing administrative burden on clinical staff.

Rank	Process to Automate	Technology Focus	Benefit & Goal
1	Medical Aid/Insurance Eligibility & Verification	RPA	Automatically access medical aid portals to verify a patient's eligibility, benefits, and co-payment requirements before service delivery, reducing billing surprises and claim rejections.
2	Claims Submission & Remittance Posting	RPA	Automate the submission of patient claims to multiple medical schemes, track claim status, and automatically post payment remittances to the patient's account ledger.
3	Patient Appointment Scheduling & Reminders	Workflow Automation	Automate the process of sending appointment confirmation messages and automated reminders (SMS/email), and allow patients to reschedule via a self-service portal.
4	Patient Record Transfer & Data Entry	RPA	Automate the secure transfer and data input of information from paper forms or external lab/referral systems into the main EHR (Electronic Health Record) system.
5	Prior Authorization Workflows	Workflow Automation	Standardize the complex, multi-step process required to get prior authorization for specific procedures or medications from insurance companies, ensuring all necessary documentation is submitted.

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Higher Education

Focuses on streamlining the high-volume, rules-based administrative tasks for students and faculty.

Rank	Process to Automate	Technology Focus	Benefit & Goal
1	Admissions Application Processing	Workflow Automation / RPA	Automate the collection, verification, internal routing for departmental review, and final communication (acceptance/rejection) of student applications.
2	Student Record Updates & Data Maintenance	RPA	Automatically update student records in the Student Information System (SIS) with data from other sources, such as grades from the LMS or address changes.
3	Financial Aid & Bursary Application Review	Workflow Automation / RPA	Automate the collection of required financial documents, run rule-based eligibility checks against criteria, and route exceptions for manual assessment.
4	Transcript and Degree Verification Requests	RPA	Automate the secure generation and delivery of official transcripts or qualification verification documents requested by alumni or third parties.
5	HR Administration for Sessional/Part-Time Staff	Workflow Automation / RPA	Streamline the onboarding, contract generation, payroll setup, and time-sheet submission processes for large numbers of temporary faculty and teaching assistants.

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Fruit **Exporters** (Post-Harvest Administration)

Focuses on documentation, logistics, and compliance required for international trade.

Rank	Process to Automate	Technology Focus	Benefit & Goal
1	Export Documentation Generation	RPA	Automatically pull data from packing lists, sales orders, and inventory systems to generate crucial export documents (Commercial Invoices, Bills of Lading, Packing Lists) ready for customs submission.
2	Customs & Regulatory Submission Workflow	Workflow Automation	Guide the internal team through the sequenced steps required for customs clearance, ensuring all phytosanitary and country-specific declarations are made on time.
3	Reconciliation of Shipment Costs	RPA	Compare invoices from carriers and freight forwarders against pre-agreed rates and internal logistics data, flagging discrepancies for finance review.
4	Traceability Data Collation and Reporting	RPA	Automatically gather product-specific data (e.g., field ID, pack date, treatment applied) from various systems and format it into the detailed traceability reports required by international buyers.

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