Masterlease

Implements new purchase process with SAP integration and compliance

Background:

As one of the leading fleet specialists in the UK and a subsidiary of General Motors Acceptance Corporation (GMAC - the global financing arm of General Motors) Masterlease Ltd is responsible for sourcing and managing around 100,000 vehicles.

A company of the size and reputation of Masterlease not only has the buying power and flexibility to meet the fleet requirements of any organisation, but also to get the best deal on its own capital and office materials requirements.

From telephones and computers to paperclips and stationery, Masterlease's annual expenditure runs into millions of UK pounds. A purchase requisition has to be made for each purchase and thousands are raised, processed and checked annually.

Masterlease enlisted Kelros to help build and implement a Purchase Requisition (PR) System that allowed users to raise requisition items from IBM Lotus Notes and would integrate with SAP.

Business need:

When GMAC had adopted a global SAP Financials strategy, Masterlease's purchase requisition process came under scrutiny along with every other financial process.

Project Leader at Masterlease, Christina Roberts, explains, "This led to a review of the entire financial solution and a reassessment of the applications surrounding it, including purchase ordering. This was previously a standalone application that required double data-entry and ran the risk of input error."

The review identified the need to provide multiple sites using Exchange, web browsers and IBM Lotus Notes with a new Purchasing Requisition approval workflow system that could automatically update Masterlease's SAP Purchase Ordering system.

The Solution:

The company turned to Kelros to help determine and deliver the solution. According to Christina Roberts, "the decision to engage Kelros was an easy one to make. We had a good experience of working with them on a project at smaller sites, Vauxhall Leasing and Saab Contract Hire."

Masterlease wanted a solution that would be quick and easy to deploy, with minimal disruption for users operating the new solution, "IBM Lotus Notes was already used for email and our Knowledge Store database." Christina explains, "We wanted a tool that people would be familiar with."

After drawing up a set of requirements Masterlease called in Kelros for further discussion. Christina Roberts says, "Our account team at Kelros really made the effort to understand our business and the way we wanted the solution to work. They suggested ways we could make the solution more dynamic, effectively future-proofing it for when requirements and technologies change."

IBM Gold Business Partner

Christina and the Masterlease team were impressed with this refreshing approach. "We felt they made the effort to design and deliver the right solution for us, rather than just a solution."

Using its off-the-shelf Purchase solution as a base, Kelros added key functionality to augment the Supplier Details and Purchase Requisition approval routing already in the packaged solution.

The Purchase Requisition system allows end-users to raise requisitions from approved suppliers in the repository. These are then email alerted to the relevant Exchange and IBM Lotus Notes users for approval.

Once approved and completed, the requisition data is automatically transferred into the SAP system via the creation of iDoc interface files – the data structure for electronic data exchange between an application and SAP.

The Outcome

Today Masterlease benefits from a cost-effective Purchase Requisition Approval system that provides:

- Email alerts for approvers
- Restricted supplier lists
- Access from IBM Lotus Notes clients
- Automatic update of SAP supplier information
- Automatic input of approved requisitions into the SAP purchase order system.

Along the way valuable lessons were learned, as Christina Roberts says, "Overall the project taught us that there are always requirements that come up unexpectedly, and you have to add contingency in. The greatest strength that a team needs is communication. You need a high level of trust in the people you are working with and a belief that they are working on your behalf. We have certainly found that with Kelros.".

The Benefits

Both before and after the Purchase Requisition solution was implemented a questionnaire was sent to the people within Masterlease who raised & approved purchase requisitions and to those who checked and paid invoices.

The results highlighted a number of benefits – even after a relatively short period of 'bedding in'.

The percentage of respondents who found it easy to raise a requisition leapt from 41% to 73%. Every person responsible for approving requisitions was able to do so in less than one hour a week after the implementation, compared to just one third before, with 94% finding it easy, up from 63%.

Sarbanes Oxley Compliance

The solution developed by Kelros also strengthened areas such as entering supplier data and the new robust approval process enables Masterlease to fulfil its compliance requirements.

As Christina Roberts explains, "Our US parent, General Motors, has a responsibility to the financial regulators and must comply with Sarbanes Oxley. The visibility of suppliers, invoices and transparency of our process that the Purchase Requisition provides helps us be more compliant."

Kelros Applications

Kelros provides a comprehensive suite of ready-to-use applications that cover HR, Finance, Sales and Business Operations.

You can select from one of four distinct methodologies to implement the Kelros solutions:

- As immediate, ready-to-use, Notes Domino solutions
- As building blocks for customer tailored development by Kelros
- As building blocks for tailored development delivered jointly by Kelros and your in-house teams
- Buy then build: the open source code is provided as standard to allow you to buy a fully customisable and flexible product, a firm foundation for quickly building your own unique business solutions and rapidly deploying them to your users, while minimising long-term administration and maintenance

All Kelros applications (both ready-to-use and bespoke development) are sold with an open design, on an unlimited user, server and copies basis in a single Notes Domino domain.

All applications are available to users via the Notes client and / or a web browser, with views accessible directly in the Notes side bar and / or mobile view web access. All applications are ready for use with IBM Sametime, to allow presence awareness, instant messaging, VoIP calls and instant meetings.

We offer solutions across the following business areas:

- CRM solutions
- Customer service solutions
- Procurement solutions
- Human resources solutions
- Web content management and intranet solutions
- Reception solutions

About Kelros

Kelros specialises in messaging and social collaboration solutions built on IBM software for clients in all sectors.

Our aim is to provide clients with an industry-leading proposition, combining our deep understanding of the challenges businesses face with expert and detailed knowledge of the technology solutions. We offer a full range of services from consultation and development of a bespoke solution, through to deployment, training and ongoing support.

Established in 1996, Kelros has developed long-standing partnerships with clients through its range of integrated, easy to deploy solutions for sales and marketing, human resources, finance and operations.

All of our technical consultants are IBM-certified with extensive specialist experience in IBM Connections, Sametime, Domino & Notes. We have a dedicated support team, which supports hosted and on premise applications and messaging infrastructure for over 120 clients.

A key Kelros differentiator is IBM software licensing. Through optimized licensing agreements and dual entitlement licensing, we ensure our clients have low software acquisition costs and minimal administration tasks, whilst maximising the benefits of IBM solutions.

Kelros IBM Expertise	Kelros Software and Tools	IBM Verse & Connections

IBM Connections is a set of secure, easy-to-use collaboration tools. It combines email, messaging, online document editing and conferencing to facilitate seamless teamwork.

IBM Verse sits within IBM Connections. It's an email hosting solution that users can access from their desktop or mobile device. IBM Verse uses social analytics to help users focus on important content and collaborate easier.

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