



Vendor compliance reporting automation

Observed business problem and result

Approximately 18 vendor compliance reports had to be prepared within a five-day monthly reporting window. Each report required one to two hours of manual preparation. A workflow using Outlook, Power Automate, and Power Query reduced the total monthly preparation to approximately four hours. The workflow was observed in use for more than one year.

REPORTS	BEFORE	AFTER	ANNUAL CAPACITY
18 vendors	18-36 hrs/mo	About 4 hrs/mo	168-384 hrs

Implementation architecture

1. ERP EXPORT	2. OUTLOOK	3. POWER AUTOMATE	4. POWER QUERY	5. HUMAN QA
Recurring source	Attachment delivery	Route and name files	Standardize and validate	Review before distribution

Representative workplan

PHASE	WORK	ACCEPTANCE CONTROL
Confirm	Validate source attachment, naming, template, and expected totals.	Approved source and output examples
Route	Use Power Automate to save and control recurring Outlook attachments.	Test attachment routed correctly
Transform	Use Power Query for normalization, mapping, type conversion, and output preparation.	Row counts and totals reconcile
Control	Surface missing, late, quantity, duplicate, and mapping exceptions.	Known exceptions appear in QA queue
Handoff	Document the refresh and retain final human approval before distribution.	User completes an observed run

DOWNLOADABLE WORKBOOK CONTENTS	SECOND VERIFIED EXAMPLE
- Fictional raw ERP export - Controlled vendor mapping - Standardized data and QA flags - Vendor-ready report - QA summary and implementation plan	A pro bono event-planning export macro reduced a weekly process from an eight-hour shift to approximately 15 minutes. The user learned the workflow in about 10 minutes and required no additional adjustments during the initial observed weeks.

Public-sample note: All workbook names and records are fictional. No person, employer, facility, client, vendor, proprietary code, or confidential record is identified. Capacity recovered is not a guarantee of payroll reduction or cash savings.