

CASE  
STUDY

MICROSOFT / AVOCADOS FROM MEXICO

# Simplifying Purchase Order Process using Microsoft Power Platform

**Avocados From Mexico (AFM)**, a non-profit marketing organization promoting Mexican avocados in the U.S., faced challenges with its financial systems, particularly an inefficient purchase order process. To address this, they adopted Microsoft's Power Platform, developing a custom app with Microsoft Partner Lantern to streamline their purchase requests, integrating it with their SAP Business ByDesign system. This integration allowed the simplification of the purchase order process, dramatically reducing the time required from 15 minutes to less than a minute per order, enhancing overall efficiency, and reducing errors.

## The Challenge

Established in 2013 by the Mexican Hass Avocado Importers Association (MHAIA) and the Association of Avocado Exporting Producers & Packers of Mexico (APEAM), AFM is tasked with promoting Mexican avocados and expanding their market presence in the U.S. AFM operates with a compact team of just over 30 people, yet supports hundreds of importers, distributors, and

### CUSTOMER

Avocados From Mexico

### INDUSTRY

Nonprofit

### SIZE

Small (1-49 employees)

### COUNTRY

United States

### SOLUTIONS & SERVICES

- Microsoft Power Apps
- Microsoft Power Automate
- Microsoft Dataverse

over 30,000 growers in Mexico, significantly doubling the import volume of Mexican avocados since its inception. The company was not fully satisfied with its financial systems, which were struggling to keep pace with the ambitious goals of the team. A significant bottleneck was identified in the purchase order (PO) process.

To support the company's rapid growth, there was a transition to SAP Business ByDesign. However, the front-end presented challenges. While it was ideal for purchasing specialists, the user interface (UI) for entering purchase requests (PRs) proved too complicated and time-consuming for the main users, who were primarily marketers working under tight execution schedules.

## The Solution

### Streamlining purchase requests with Microsoft Power Platform

Already deeply invested in Microsoft cloud technologies and consistently pursuing new innovations, AFM identified the low-code capabilities of the Power Platform as the optimal solution for enhancing user experience. In partnership with Microsoft Partner Lantern, AFM developed a customized application utilizing Power Apps, which was

seamlessly integrated with their existing SAP ByDesign system.

This tailored application refined the purchase request (PR) fields in SAP to include only those essential to the organization, markedly accelerating the purchase order (PO) process. This strategic implementation underscores AFM's commitment to leveraging advanced technology to improve operational efficiency.

The application's streamlined user interface significantly reduced the occurrence of errors. Previously, it was common for users to inadvertently submit purchase requests to contracts from the previous fiscal year at the start of a new one. The newly developed app effectively addressed this issue, along with other potential input errors, by enforcing specific business rules that guide user interactions and data entry. This enhancement not only minimized mistakes, but also improved overall process efficiency.

**"By streamlining our purchase order process with Power Platform, what previously took up to 15 minutes per PO now takes less than a minute."**

**Miguel Molina**  
Chief Financial Officer  
Avocados From Mexico

### Tight integration with SAP Business ByDesign

To initiate a new purchase request within the application, users select a supplier from the company's list. This action triggers a live API call to SAP ByDesign, retrieving relevant contract details such as the current available balance, which are then displayed in real-time through a custom connector.

As shown in Figure 1, a [Power Platform](#) dataflow retrieves master data from SAP, stored in Dataverse, enhancing the ease of access and reporting on purchase requests (PRs) and purchase orders (POs). This demonstrates the Power Platform's capability to seamlessly integrate with SAP systems, facilitating a cohesive and streamlined process for managing purchase requests.

Users navigate this data through straightforward drop-down menus, add new line items, attach necessary documents, and submit the request for approval. The

**"We've been able to create more convenient channels to approve purchase requests which has led to faster approvals and greater efficiency across our entire procure-to-pay process."**

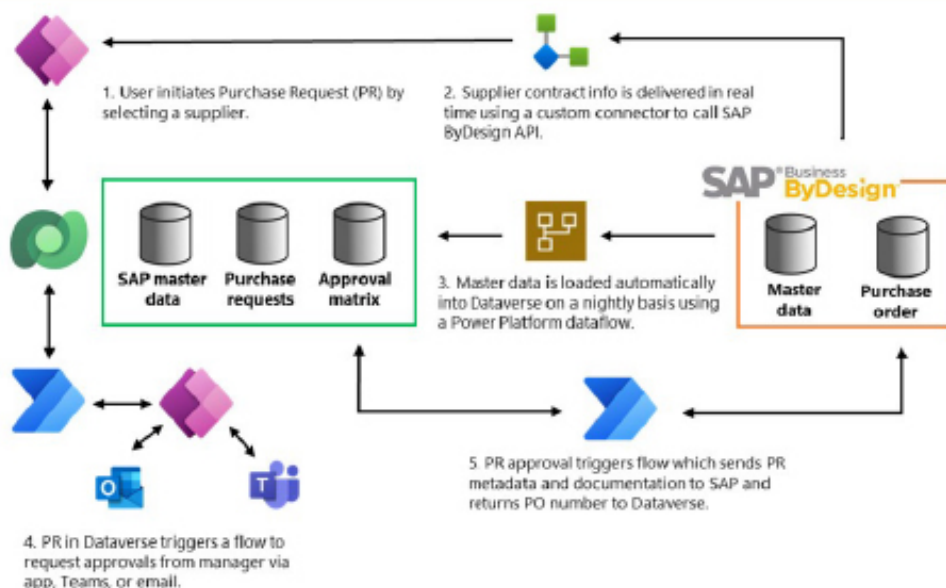
**Quintin Rohrbaugh**  
Associate Manager  
Avocados From Mexico

submission activates a [Power Automate](#) cloud flow that directs the PR to the right managers. Power Platform displays a significant benefit here: convenient manager review and approval requests via mobile devices or email notifications.

Previously, the process for managers to review and approve purchase requests (PRs) required logging into SAP via laptops. However, this workflow has been modernized to allow the same approvals to be conducted through an app on mobile devices or via integrated cards in Microsoft Teams or Outlook email. Push notifications enabled on the app inform managers of pending approval requests without the need to open the app.

Upon approval of a purchase request (PR), a subsequent Power Automate flow activates, which systematically assembles a record of the PR for auditing purposes. (This is crucial, as the company is subject to regular audits by the USDA). Power Automate consolidates the PR header details and approval history into a Word template, after which a distinct PDF service amalgamates the Word document with additional supporting documents. Following this integration, the complete documentation is automatically forwarded to SAP where another flow initiates the creation of a purchase order (PO) and returns the PO number back to Dataverse. A custom connector for the SAP Rest API is used to connect SAP with Power Automate.\*

#### Schema showing the company's new purchase order request and approval process.



\*A pre-built [SAP ERP connector](#) is available for Power Platform which supports all SAP versions from R/3 forward, including SAP ECC and SAP S4/HANA. A connector that will support integration with SAP ByDesign is currently in development.

## The Result

A streamlined user interface has significantly enhanced the efficiency with which employees at AFM can submit purchase requests. The integration of business rules within the application has effectively reduced errors, further optimizing the submission process. Additionally, the approval process for purchase requests has been expedited, leading to increased overall efficiency throughout the entire procure-to-pay process.

## Future Plans

### From automation to AI and analytics

Looking forward, Avocados From Mexico is poised to further harness the capabilities of the Power Platform to drive innovation. An integral part of this advancement is the integration of an invoicing application into their existing system architecture.

For this forthcoming phase, utilizing Dataverse will be crucial in enhancing development efficiency. By storing master data within Dataverse, the team can efficiently repurpose this structured data for the new invoicing application.

Additionally, Dataverse will facilitate improved discoverability and robust reporting on both historical and current purchase requests (PRs) and purchase orders (POs) through a Power BI dashboard, marking another significant enhancement.

AFM is keenly interested in expanding its use of the Power Platform's capabilities. The organization anticipates the soon-to-be-deployed Power Virtual Agents bots that will handle queries such as "What is the status of my invoice?" AFM is also exploring the potential of AI Builder's document processing model to efficiently extract data from invoices. Plans are also in progress to implement Microsoft Fabric to centralize data and bolster the company's data analytics capabilities. This integration with Microsoft Fabric is expected to greatly enhance the value extracted from Dataverse data and enable broader use of AI across the organization.

This strategy aligns with a broader vision termed 'autonomous finance,' in which a significant proportion of transactions are automated through the Power Platform. This would allow the teams at AFM to focus on exceptions and high-value activities. This innovative approach is expected to significantly boost operational efficiency and productivity across the organization.

**"With Power Platform dataflows, we're able to prep SAP data and move it to Dataverse automatically while also maintaining one source of truth in SAP."**

**Geetha Sivasailam**  
Practice Lead at Lantern