

Robotic Process Automation as a Lever for Productivity in a Luxury E-Commerce Company

Teresa Maria Carvalho Coelho Ribas

Master's Dissertation

FEUP Supervisor: Prof. Jonas André Rodrigues Henriques de Lima

U. PORTO

FEUP FACULDADE DE ENGENHARIA
UNIVERSIDADE DO PORTO

Master in Mechanical Engineering

2023-06-26

Abstract

The present dissertation was developed within the Data and Automation Governance team, a team inside FARFETCH's Workforce Optimisation department, with the primary objective of creating the necessary link between the Automation team and the other several teams inside FARFETCH Global Operations department. FARFETCH is a business that depends on its relationship with its customers and partners, making the enhancement of this relationship a necessity, which is possible to be achieved through the implementation of this link. By having it, it is possible to assess business processes looking for improvements, leading to an increase in the company's productivity.

Initially, the team analysed its roadmap and identified four initiatives for automation based on business priorities. Once these were chosen, it was arranged a meeting for every process in which it was possible to thoroughly review and analyse the processes, leading to finding possible improvements. When this was achieved for the four initiatives chosen, it was essential to develop the required documentation along with the collaboration of several other teams. Subsequently, the documentation entered the RPA team's backlog, awaiting implementation based on business priorities. With the implementation of the improvements proposed for every process and the development and future implementation of the Robotic Process Automation technology in the chosen initiatives, FARFETCH would be able to have these processes digitally transformed and also expect a total savings of 1507.7 hours during the development of this project.

In addition to process automation, FARFETCH stakeholders need to understand the performance of RPAs already live thoroughly. Hence, it is a requirement that they have all the necessary information to perform the best decision for the business. In order to deliver this information in the best possible manner, it was suggested the implementation of improvements to the process of reporting the RPAs' performance to the stakeholders, which would be done in a three-step sequence. Once these three steps were achieved, a dashboard containing the information and updated daily would be presented to offer the stakeholders the chance to have better insights on the performance of each RPA developed, as well as the benefits FARFETCH achieved with this technology.

FARFETCH seeks to optimise operations, strengthen ties with clients and partners, and boost productivity by creating a connection between the Automation team and other divisions. The dissertation covers the selection, analysis, documentation, and implementation of automated processes and the support given to create a performance dashboard to aid in making well-informed choices.

Resumo

Automação Robótica de Processos como Alavanca para a Produtividade numa Empresa de Comércio Electrónico de Luxo

A presente dissertação foi desenvolvida junto da equipa de *Data and Automation Governance*, uma equipa pertencente ao departamento de *Workforce Optimization* da FARFETCH, com o objetivo primordial de criar a ligação necessária entre a equipa de Automação e as várias equipas do departamento de *Global Operations* da FARFETCH. A FARFETCH é uma empresa que depende da sua relação com os clientes e parceiros, o que torna a melhoria desta relação uma necessidade, possível de ser alcançada através da implementação desta ligação. Ao estabelecer esta, torna-se possível avaliar os processos de negócio com possíveis melhorias, conduzindo a um aumento da produtividade da empresa.

Inicialmente, a equipa analisou o seu *roadmap* e identificou quatro iniciativas para a automação com base nas prioridades de negócio. Uma vez escolhidas essas iniciativas, foram agendadas reuniões para cada processo, nas quais foi possível rever e analisar detalhadamente os processos, levando à identificação de possíveis melhorias. Quando isto foi alcançado para as quatro iniciativas escolhidas, foi essencial desenvolver a documentação necessária, contando com a colaboração de várias outras equipas. Posteriormente, a documentação foi incluída na lista de tarefas da equipa de Automação Robótica de Processos (RPA), aguardando implementação de acordo com as prioridades do negócio. Com a implementação das melhorias propostas para cada processo e o desenvolvimento e futura implementação da tecnologia de Automação Robótica de Processos nas iniciativas escolhidas, a FARFETCH seria capaz de transformar digitalmente esses processos, bem como esperar uma poupança total de 1507.7 horas durante o desenvolvimento deste projeto.

Para além da automação de processos, os *stakeholders* da FARFETCH precisam de compreender de forma abrangente o desempenho dos RPAs já em funcionamento. Assim, é requisito que tenham todas as informações necessárias para tomar as melhores decisões para o negócio. Com o intuito de fornecer esta informação da melhor forma possível, foi sugerida a implementação de melhorias ao processo de reportar o desempenho dos RPAs aos *stakeholders*, que seriam realizadas num processo de três etapas sequenciais. Uma vez alcançadas essas três etapas, seria apresentado um *dashboard* contendo as informações e atualizado diariamente, oferecendo aos *stakeholders* a oportunidade de obter uma melhor compreensão do desempenho de cada RPA desenvolvido, bem como dos benefícios alcançados pela FARFETCH com esta tecnologia.

A FARFETCH procura otimizar as operações, fortalecer os laços com os clientes e parceiros, e aumentar a produtividade através da criação de uma ligação entre a equipa de Automação e as outras áreas. Esta dissertação abrange a seleção, análise, documentação e implementação de processos automatizados, bem como o suporte fornecido para a criação de um *dashboard* para controlo de desempenho, auxiliando na tomada de decisões fundamentadas.

Acknowledgements

Firstly, I would like to thank Professor Jonas Lima for all his help throughout the project's development, always taking the best of me while posing fascinating challenges.

I also want to thank everyone in my team at FARFETCH. Thank you for always being open to helping me and making me feel integrated from day one. Of all the people I encountered during this period, I want to thank Rita particularly. I want to thank her for being a mentor to me, always being available and patient to answer all my questions, and for the constant support and feedback, making me always want to put my best self in every task.

Next, I want to thank my group of friends, who made these five years the most incredible period. Thank you for all the unforgettable moments, for always being there when I needed, for constantly putting up with my silliness and for always being there during these five years.

Last but not least, I want to thank my parents and my sister for all their support, not only for my academic path but in my day-to-day life. To my mother for always listening to me without judgement and being my biggest supporter. To my father for being an inspiration of hard work, showing me that I can become whoever I want, for always guiding and supporting me in every decision I made and for all the love and affection shown every time I return home. To my sister for showing me what determination, resilience and courage look like and for being my go-to when I need advice no matter the subject. Thank you all for always being by my side, constantly pushing me to want to outdo myself, making me want to be my best self and always believing in me even when I did not. I hope I managed to make you proud.

*"Sê todo em cada coisa. Põe quanto és
No mínimo que fazes."*

Ricardo Reis

Contents

1	Introduction	1
1.1	Company’s presentation	1
1.2	Project objectives	4
1.3	Methodology	5
1.4	Dissertation structure	5
2	Theoretical Background	7
2.1	Digitalisation	7
2.1.1	Digital Transformation	8
2.2	Business Process Management	8
2.2.1	Business Process Model and Notation 2.0	9
2.3	Robotic Process Automation	12
2.3.1	Selecting Processes for Automation	14
2.3.2	Business Analyst	15
2.4	How to develop an RPA	16
2.5	Key Performance Indicators (KPIs)	17
3	RPA status at FARFETCH	19
3.1	RPA at FARFETCH	19
3.2	RPA Flow at FARFETCH	26
4	RPA’s development strategy	33
4.1	LMP vs Geopricing	33
4.2	Backlog COPS	37
4.3	Commercial Routes Creation	39
4.4	RTO Requests v2	43
5	Reporting	47
5.1	As-Is Reporting	47
5.2	To-Be Reporting	48
6	Conclusions and future work	53
6.1	Future Work	54
A	LMP vs Geopricing	61
B	Backlog COPS	69
C	Commercial Routes Creation	87

D RTO Requests v2

101

Acronyms and Symbols

AHP	Analytics Hierarchy Process
AHT	Average Handling Time
API	Application Programming Interface
BA	Business Analyst
BC	Business Case
BPM	Business Process Management
BPMN 2.0	Business Process Model and Notation 2.0
CS	Customer Service
CSAT	Customer Satisfaction
CoE	Center of Excellence
COPS	Customer Operations
CRM	Customer Relationship Management
CROPS	Creative Operations
DAG	Data and Automation Governance
DS	Delivery Support
FPS	FARFETCH Platform Solutions
FTE	Full-time equivalent
GP	Geoprice
KPI	Key Performance Indicator
LMP	Local Market Price
MCDM	Multi-Criteria Decision Making
NGG	New Guards Group
PD	Process Documentation
PO	Process Owner
PS	Partner Service
ROI	Return on Investments
RPA	Robotic Process Automation
RTO	Return to Origin
SE	Service Excellence
SG&A	Selling, General and Administrative
SME	Subject Matter Expert
UAT	User Acceptance Testing
WFM	Workforce Management
WFO	Workforce Optimization

List of Figures

1.1	Global Operations teams	3
1.2	WFO Department	3
2.1	Types of events - Source: (BPMN, 2022)	9
2.2	Types of activities - Source: (BPMN, 2022)	10
2.3	Types of gateways - Source: (BPMN, 2022)	10
2.4	Types of data objects - Source: (Object Management Group, 2010)	10
2.5	Types of gateways - Source: (Object Management Group, 2010)	11
2.6	Representation of a swimlane - Source: (Object Management Group, 2010)	11
2.7	Types of artefacts - Source: (Object Management Group, 2010)	11
3.1	Number of RPAs that went live per Month	20
3.2	Amount of hours saved by Month since RPA implementation	21
3.3	Percentage of dollars saved by Month since RPA implementation	22
3.4	Dashboard for Customer Satisfaction	23
3.5	Graphic with the DAG Team roadmap	25
3.6	RPA Flow at FARFETCH - Business Case Stage	27
3.7	RPA Flow at FARFETCH - Process Documentation Stage	29
3.8	RPA Flow at FARFETCH - Implementation and Maintenance Stages	30
3.9	Changes Flow at FARFETCH	31
4.1	LMP vs Geopricing process before RPA implementation	34
4.2	LMP vs Geopricing process with RPA implementation	35
4.3	Backlog COPS process	37
4.4	Commercial Routes Creation process before RPA implementation	40
4.5	Commercial Routes Creation process after RPA implementation	42
4.6	RTO Requests v2 process	44
5.1	Dashboard in Looker	49
5.2	Mock-up Dashboard	51
A.1	LMP vs Geopricing Business Case - first part	61
A.2	LMP vs Geopricing Business Case - second part	61
A.3	LMP vs Geopricing Process Documentation - first part	62
A.4	LMP vs Geopricing Process Documentation - second part	63
A.5	LMP vs Geopricing Process Documentation - third part	64
A.6	LMP vs Geopricing Process Documentation - fourth part	65
A.7	LMP vs Geopricing Process Documentation - fifth part	66
A.8	LMP vs Geopricing Process Documentation - sixth part	67

B.1	Backlog Finder COPS Business Case - first part	69
B.2	Backlog Finder COPS Business Case - second part	69
B.3	Backlog Finder COPS Process Documentation - first part	70
B.4	Backlog Finder COPS Process Documentation - second part part	71
B.5	Backlog Finder COPS Process Documentation - third part	72
B.6	Backlog Finder COPS Process Documentation - fourth part	73
B.7	Backlog Finder COPS Process Documentation - fifth part	74
B.8	Backlog Finder COPS Process Documentation - sixth part	75
B.9	Backlog Finder COPS Process Documentation - seventh part	76
B.10	Backlog Manager COPS Business Case - first part	77
B.11	Backlog Manager COPS Business Case - second part	77
B.12	Backlog Manager COPS Process Documentation - first part	78
B.13	Backlog Manager COPS Process Documentation - second part	79
B.14	Backlog Manager COPS Process Documentation - third part	80
B.15	Backlog Manager COPS Process Documentation - fourth part	81
B.16	Backlog Manager COPS Process Documentation - fifth part	82
B.17	Backlog Manager COPS Process Documentation - sixth part	83
B.18	Backlog Manager COPS Process Documentation - seventh part	83
B.19	Backlog Manager COPS Process Documentation - eighth part	84
B.20	Backlog Manager COPS Process Documentation - ninth part	85
C.1	Commercial Routes Creation Business Case - first part	87
C.2	Commercial Routes Creation Business Case - second part	87
C.3	Commercial Routes Creation Business Case - third part	88
C.4	Commercial Routes Creation Process Documentation - first part	88
C.5	Commercial Routes Creation Process Documentation - second part	89
C.6	Commercial Routes Creation Process Documentation - third part	89
C.7	Commercial Routes Creation Process Documentation - fourth part	90
C.8	Commercial Routes Creation Process Documentation - fifth part	91
C.9	Commercial Routes Creation Process Documentation - sixth part	92
C.10	Commercial Routes Creation Process Documentation - seventh part	93
C.11	Commercial Routes Creation Process Documentation - eighth part	94
C.12	Commercial Routes Creation Process Documentation - ninth part	95
C.13	Commercial Routes Creation Process Documentation - tenth part	96
C.14	Commercial Routes Creation Process Documentation - eleventh part	97
C.15	Commercial Routes Creation Process Documentation - twelfth part	98
C.16	Commercial Routes Creation Process Documentation - thirteenth part	99
C.17	Commercial Routes Creation Process Documentation - fourteenth part	100
D.1	RTO Requests v2 Business Case - first part	101
D.2	RTO Requests v2 Business Case - second part	101
D.3	RTO Requests v2 Business Case - third part	102
D.4	RTO Requests v2 Business Case - fourth part	102
D.5	RTO Requests v2 Business Case - fifth part	102
D.6	RTO Requests v2 Process Documentation - first part	103
D.7	RTO Requests v2 Process Documentation - second part	104
D.8	RTO Requests v2 Process Documentation - third part	105
D.9	RTO Requests v2 Process Documentation - fourth part	106
D.10	RTO Requests v2 Process Documentation - fifth part	107

D.11 RTO Requests v2 Process Documentation - sixth part	108
D.12 RTO Requests v2 Process Documentation - seventh part	109
D.13 RTO Requests v2 Process Documentation - eighth part	110
D.14 RTO Requests v2 Process Documentation - ninth part	111
D.15 RTO Requests v2 Process Documentation - tenth part	112
D.16 RTO Requests v2 Process Documentation - eleventh part	113
D.17 RTO Requests v2 Process Documentation - twelfth part	114
D.18 RTO Requests v2 Process Documentation - thirteenth part	115
D.19 RTO Requests v2 Process Documentation - fourteenth part	116
D.20 RTO Requests v2 Process Documentation - fifteenth part	117
D.21 RTO Requests v2 Process Documentation - sixteenth part	118
D.22 RTO Requests v2 Process Documentation - seventeenth part	119
D.23 RTO Requests v2 Process Documentation - eighteenth part	120
D.24 RTO Requests v2 Process Documentation - nineteenth part	121
D.25 RTO Requests v2 Process Documentation - twentieth part	122
D.26 RTO Requests v2 Process Documentation - twenty-first part	123
D.27 RTO Requests v2 Process Documentation - twenty-second part	124
D.28 RTO Requests v2 Process Documentation - twenty-third part	125
D.29 RTO Requests v2 Process Documentation - twenty-fourth part	126

List of Tables

3.1	DAG Team roadmap	24
-----	----------------------------	----

Chapter 1

Introduction

Companies have been able to enhance their business processes thanks to the growing usage of digital technologies, leading to an increase in the productivity and efficiency of their operations. The achievement of this objective — often referred to as the "digital transformation of organizations" — can be significantly aided by the application of Robotic Process Automation (RPA), a technology that allows the replication of human actions in already-existing systems given its advantages (Gomes and Seruca, 2023).

Due to its innovative approach to e-commerce luxury retail, commitment to sustainability, and expansion into physical retail, FARFETCH is a pioneer in the fashion business and a significant player in this sector. As such, it is constantly working to enhance the consumer experience. Having this in mind, FARFETCH decided to deploy RPA technology, which would help free the employees from non-added value labour while maintaining the same quality of customer support.

This dissertation project took place on FARFETCH's Data & Automation Governance (DAG) team, and it aims to delve deeply into the non-value added processes of the teams, detail all potential areas for improvement, document all of them, collaborate in the testing phase and ensure that, in the end, the business can thrive. This project aims to serve as a conduit between FARFETCH teams' automation needs and the RPA Team's capabilities, ensuring that there is always a healthy and excellent backlog of value-added initiatives to develop.

This chapter provides an overview of the business where this project was created, including information on the values that FARFETCH upholds and the Global Operations area, which receives support from the Workforce Optimization (WFO) department, where the DAG team is included. In addition to this, this chapter also makes it feasible to comprehend the goals of this dissertation project and the approach used to reach those goals. Finally, the dissertation's structure is presented.

1.1 Company's presentation

FARFETCH is an online marketplace for luxury fashion, and it was thought to connect consumers with boutiques and brands from all over the world. This online platform was founded by

the Portuguese businessman José Neves in 2007, being launched in 2008. FARFETCH serves as a global marketplace that connects customers with more than 1400 luxurious partners across the globe (FARFETCH, 2018a). Besides its own marketplace, where customers are able to purchase products owned by the partners, FARFETCH is also a platform with two additional business units: Browns and Stadium Goods, which provide customers with luxury goods, and New Guards Group (NGG) - a platform layer that focuses on the creation, manufacturing, and development of brands. Moreover, FARFETCH also has its Luxury New Retail project, which includes Future Retail and FARFETCH Platform Solutions (FPS). Future Retail concentrates on creating creative solutions for the retail sector, while FPS provides end-to-end commerce solutions to help luxury brands and retailers expand and innovate faster (FARFETCH, 2018b).

FARFETCH's mission is to be "*the global technology platform for luxury, connecting creators, curators and consumers*", and in order to achieve this mission, the FARFETCH group is led by six values (FARFETCH, 2018c):

- Be Revolutionary - adopt innovation to reshape the future
- Think Global - be a part of a global community and act as one cohesive force
- Be Human - treat everyone with respect and kindness
- Be Brilliant - be passionate and ambitious.
- All Together - act for all team's best interest.
- Amaze Customers - love and comprehend clients, always having them in mind.

As it was already mentioned, FARFETCH connects customers and partners. On the one hand, by using FARFETCH's platform, buyers can browse the products they want, order and receive them. On the other hand, partners create the season's catalogue present on the platform, await customer orders, ship the items, and then have their performance evaluated. In order to achieve this, FARFETCH has several departments that work together, such as the Global Operations area, which is composed of four teams: Service Excellence (SE), FinTech Ops, Creative Operations, and Supply Chain. From these, the FARFETCH department responsible for being the link between clients and partners is the SE team, which is composed of the Customer Service (CS) - formed of the employees in charge of supporting the customers, the Premium Service team (that supports FARFETCH's premium clients), the Service Improvement team (that assists the other CS teams in enhancing their assignments) and Customer Operations (COPS) team (that supports the other CS teams in specific tasks) -, Partner Service (PS), Service Management and WFO teams, as it is possible to see in Figure 1.1.

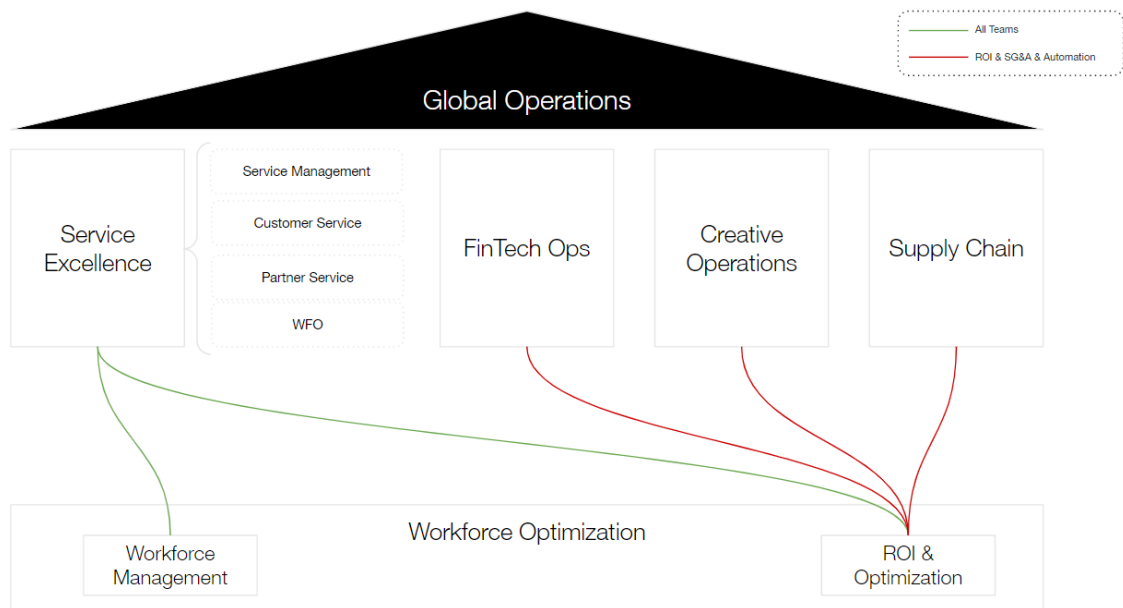


Figure 1.1: Global Operations teams

The seamless operation of FARFETCH relies on effective collaboration between various departments, as was already mentioned. By looking at Figure 1.1, it is explicit that the WFO department is responsible for supporting the four teams already mentioned. This team organizes, plans and ensures that the other teams perform as effectively and efficiently as possible. The primary objective of the WFO department is to establish a reputation as a service provider at FARFETCH for predictability, effective planning, Selling, General and Administrative (SG&A) management, and Automation implementation for Global Operations. Figure 1.2 depicts how the WFO department is organized, as well as the teams it has.

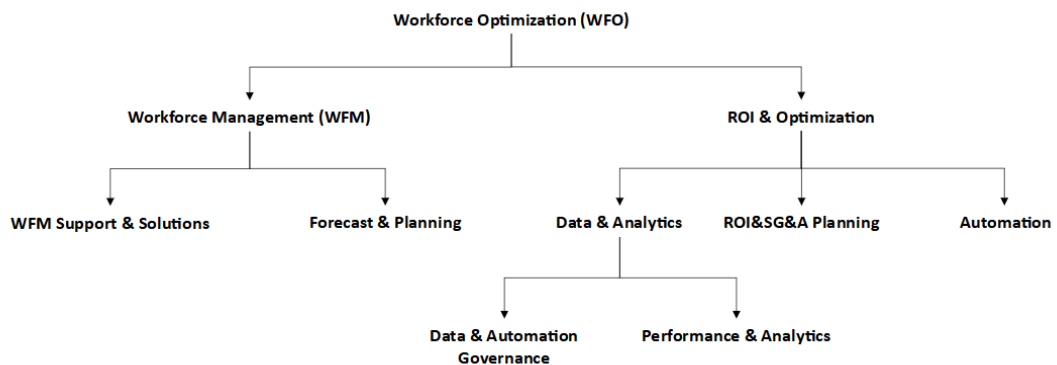


Figure 1.2: WFO Department

As shown in Figure 1.2, the Workforce Management (WFM) and the Return on Investments (ROI) & Optimization teams are part of the WFO department. On the one hand, the WFM team

is in charge of forecasting communication volume and the number of personnel needed, ensuring support to the employees so they have the necessary equipment, and planning their schedules. This team can also be divided into the Forecast & Planning team, which is responsible for providing forecasts based on historical data and assumptions as well as the headcount for budget and recruitment, and the WFM Support & Solutions team, which is in charge of delivering workforce solutions through innovation projects and discovery sessions to enable better business outcomes. The ROI & Optimization team, on the other hand, finds opportunities to maximize ROI and increase expansion in the company's marketing and advertising operations. This department is composed of three sub-teams in order to accomplish its goals: the Data & Analytics team, the Automation team and the ROI&SG&A Planning team. As seen in the Figure above, the Data & Analytics team can be separated into two sub-teams: the Data & Automation Governance team and the Performance & Analytics.

As previously mentioned, this dissertation project was developed under the Data & Analytics team, more specifically in the DAG team. This team works hand in hand with the Automation team since this is the team responsible for developing the RPAs needed for the business to thrive. However, this team needs to have the necessary documentation to perform their duties, which is the responsibility of the DAG team, as explained in the following chapters.

1.2 Project objectives

The project developed for this dissertation aims to create the necessary link between the Automation team and the several Global Operations teams. As previously mentioned, this link is of extreme importance for the company so, in order to improve it, it is necessary to examine the business team's processes. While analysing the processes, it would be possible for the person that performs this to serve as a consultant to evaluate how the process may be carried out more effectively and efficiently. suggesting possible improvements to the processes. Besides this, this person would also determine whether the processes can be automated to use the RPA technology. This role will be analysed in detail in chapter 4 of this dissertation.

The creation of a document for each process analysed is of key importance to the Automation team since they need to have a backlog of new initiatives to implement the RPA technology in accordance with the business's priorities.

In order to become the link needed, the following points were defined to be the goals of this dissertation:

- Choose Business Cases to automate, designing the to-be process and the Process Documentation for them.
- Have approximately 500h of savings until the end of the project.
- Document processes that have 80% of their activities possible to be automated.

It is anticipated that with the delivery of this project and the achievement of the desired outcomes, the level of efficiency and the amount of savings generated due to the automations developed will grow.

1.3 Methodology

Creating the necessary documentation to deliver to the Automation team was essential to reach this project's goals. For this to be accomplished, it was necessary to understand how these documents are created:

- First, it is essential to determine whether the procedures might be automated; if so, it is crucial to understand those processes thoroughly. For this to be possible, the Business team is asked to demonstrate the process in a shadowing session.
- The Business Case for the procedures is then produced in the second stage.
- The creation of the Process Documentation (PD) for the selected processes, which the Automation team uses to create the RPA, is the third stage.
- Finally, in the fourth stage, there is the interpretation of the results that the RPA produced.

The stages stated above were repeated for every process developed during this dissertation since it was essential to have as many Business Cases as possible to deliver to the Automation team backlog.

1.4 Dissertation structure

This dissertation is divided into six chapters.

The first chapter refers to the introduction. This chapter contains the project's context and motivation and a brief presentation of the company, its history and the team where the project was conducted. Further in this chapter, the project objectives and methodology are explained, as well as the document's layout.

The literature review is covered in the second chapter. Definitions of the terms necessary to comprehend the document's content can be found here. Additionally, a summary of how the implementation of an RPA is performed, following the literature, can be found in this chapter.

The third chapter discusses what the status of RPA in FARFETCH is. This chapter demonstrates how RPA technology is implemented in FARFETCH and what FARFETCH has accomplished as a result of this technology.

The fourth chapter presents the methods used to develop the processes during this project. Here is possible to observe how the RPA development processes were created from the start.

The implementation of improvements to an existing reporting that measures the several RPAs live accomplishments is shown in the fifth chapter.

The last chapter discusses the project's main concepts and outputs while also making recommendations for further work.

Chapter 2

Theoretical Background

This chapter assembles the most pertinent concepts to this dissertation and can be separated into five independent portions.

This chapter's first part focuses on the definition of digitalisation, its correlation with digital transformation, and how RPA plays a role in these.

The second subchapter focuses on business process management: it provides a brief explanation of the concept. Also, it emphasises the Business Process Model and Notation 2.0 (BPMN 2.0) methodology since this was used during this project's development.

The concept of RPA, including its definition, the prerequisites for a process to be automated, the project lifecycle, prospective applications for the technology, and its advantages, will be the focus of the third part of this chapter. The role of a Business Analyst in an RPA installation will also be covered in this section.

The fourth section of this chapter will analyse the implementation of an RPA as described in the literature so that it can be compared to how FARFETCH applies this technology in the following chapter.

Finally, the fifth section of this chapter gives the definition of Key Performance Indicators (KPIs) and their importance for companies.

2.1 Digitalisation

Digitalisation can be defined as the reorganisation of various areas of social life around digital media and communication infrastructures (Brennen and Kreiss, 2016). In order to survive and prosper, businesses must adapt to the increasing trend of digitalisation and enhance their digital skills in every area. It enables businesses to deal effectively with uncertainty and meet customer needs. Digitalisation involves a fundamental change in the company's strategy, processes and knowledge, not only the adoption of new technologies (Deepu and Ravi, 2021).

Multiple studies show that digitalisation can bring several advantages to companies, as already mentioned, being automation and process optimisation one of them, which can increase efficiency and profitability through cost savings, accelerating production, and reducing errors (Truant et al.,

2021). With this, it is possible to conclude that digitalisation may affect several organisational factors, which can be performance outcomes (Alsufyani and Gill, 2022). Besides this, with the implementation of digital technology, companies can expect an increase in their revenue opportunities (Sklyar et al., 2019), meaning that digitalisation can have a positive effect on firm performance (Martín-Peña et al., 2020). Additionally, it is quickly emerging as one of the crucial components for guaranteeing that production processes are changed over to a structurally better standard of competitiveness and enhanced firm performance (Salvi et al., 2021).

Digitalisation catalyses digital transformation by offering the necessary infrastructure and capabilities to start the journey of organisational change and innovation in the digital world.

2.1.1 Digital Transformation

The progress of organisations in the digital age is driven by the concepts of digitalisation and digital transformation, which are interrelated. The goal of digital transformation is to radically alter business models, processes, and customer experiences through the integration of digital technologies. It involves a more prominent and more strategic approach. Digital transformation employs these digital capabilities to rethink and reinvent organisations, creating new value propositions and competitive advantages.

Because of the digital change of businesses, new approaches exist to compete for the most discerning clients who need individualised solutions, which justifies the shifting from creating and marketing a single product to providing integrated solutions that focus on meeting customers' demands. (Davies, 2004).

According to the digital transformation ideology, automation may be used in the digitisation of a process, which makes RPA a growing trend in business process restructuring (Moreira et al., 2023), making its implementation crucial towards digital transformation. Organisations frequently identify manual, repetitive, and human error-prone processes as part of digital transformation programmes. This technology enables organisations to automate tedious procedures and streamline operations, making it a crucial part of the digital revolution. Lowering manual labour requirements and enabling businesses to deploy resources more wisely aids in unlocking the digitalisation potential and ultimately supports the more general objectives of digital transformation.

2.2 Business Process Management

Businesses operate better when they pay close attention to every step of their business processes than when they do not. So, it is possible to say that for a business to be effectively managed, it is critical to comprehend the steps that make up a business process, the individuals involved in each step, the information that is exchanged and processed during each step, and the technologies that are used to carry out them. An organisation can improve the production of a specific product or service by optimising and aligning all these factors, for example, by accelerating the business process or increasing efficiency (Reijers, 2021).

One way to perform this is by using Business Process Management (BPM) since this helps manage and control organisational activities (Czvetkó et al., 2022).

Selecting a modelling language is crucial to map a process effectively, existing several languages and notations that can be used. Some of the languages that can be chosen are Business Process Model and Notation (BPMN), Unified Modeling Language (UML), flowcharts, Event-driven Process Chain (EPC), and Data Flow Diagram (DFD), BPMN being the one used for this project.

In the following subsection, the several elements present in BPMN will be detailed to more easily comprehend the diagrams demonstrated in this dissertation.

2.2.1 Business Process Model and Notation 2.0

BPMN 2.0 is a widely used graphical notation for describing business processes, and in the context of business process management, it is used to document, analyse and optimise processes efficiently. This notation is one of the most widely used methodologies for defining business process models. It is currently gaining a definite advantage over other proposed notations for modelling business processes because of its user-friendly and graphical notation, which is well-liked by both the corporate world and academics, and also due to the support offered by a wide range of modelling tools (Corradini et al., 2021).

Using BPMN in diagrams provides a standard framework for process improvement projects, promoting stakeholder understanding and cooperation in BPM activities. Organisations can improve their process management's clarity, consistency, and alignment by utilising this notation in their BPM practices, enhancing communication, analysis, and business process optimisation.

BPMN 2.0 has five different sorts of elements: flow objects, data, connecting objects, swimlanes and artefacts (Object Management Group, 2010).

2.2.1.1 Flow Objects

Three different types of flow objects can be used to define the behaviour of a business process: events, activities, and gateways.

An event is a trigger that either initiates, alters, or ends a process. It is shaped like circles that may contain symbols inside so that it is possible to distinguish between various causes or outcomes. Depending on when they impact the flow, there are three different events: Start, Intermediate, and End (Object Management Group, 2010). It is possible to view the possible types of events in Figure 2.1.



Figure 2.1: Types of events - Source: (BPMN, 2022)

An activity is a general term for a business's work as part of a process. A rounded rectangle represents it, as it is possible to check in Figure 2.2.



Figure 2.2: Types of activities - Source: (BPMN, 2022)

Finally, gateways decide how pathways branch, fork, merge, and connect. A diamond symbol represents it and can be inclusive, exclusive, parallel or based on data or events, as shown in Figure 2.3.

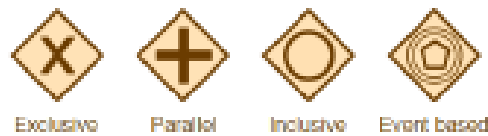


Figure 2.3: Types of gateways - Source: (BPMN, 2022)

2.2.1.2 Data

Data Objects represent a single thing or a group of objects, giving information on what activities are required to be performed and what they can create. They are typically represented as shown in Figure 2.4.

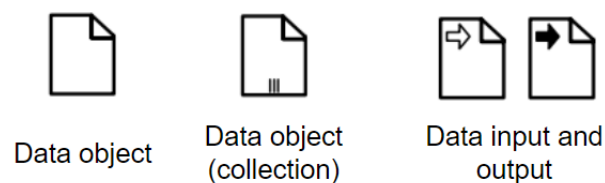


Figure 2.4: Types of data objects - Source: (Object Management Group, 2010)

The figure above illustrates the four different ways that data can be represented. Data objects can represent a single document or a group of documents, as well as data input and output for situations when importing or exporting data is required.

2.2.1.3 Connecting Objects

The Flow Objects mentioned above can be linked to each other or other data through Connecting Objects. There are four Connecting Objects, as presented in Figure 2.5:

- Sequence Flows - it shows the order in which the activities will be executed.
- Message Flows - it is used to show the flow of messages.
- Associations - it is used to connect data and artefacts to graphical elements of the BPMN diagram.

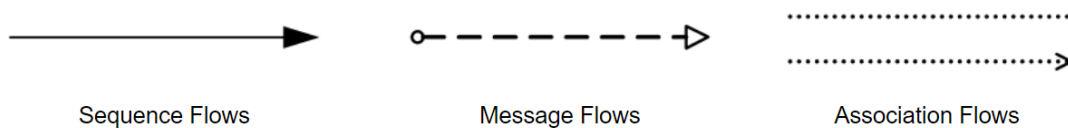


Figure 2.5: Types of gateways - Source: (Object Management Group, 2010)

2.2.1.4 Swimlanes

Swimlanes, an assembly of lanes and pools, are used to organize the significant components of the process. In the development of this project, a pool symbolizes something more general, such as a process or a subprocess, and lanes are more specialized, such as the software or platform used to carry out the activities in that lane. Lanes are introduced into pools. Figure 2.6 may be interpreted as a swimlane representation.

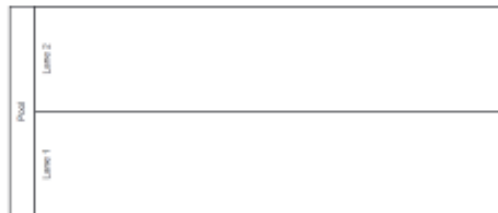


Figure 2.6: Representation of a swimlane - Source: (Object Management Group, 2010)

2.2.1.5 Artefacts

Artefacts can be used to offer further details regarding the process. Figure 2.7 shows the current collection of artefacts.

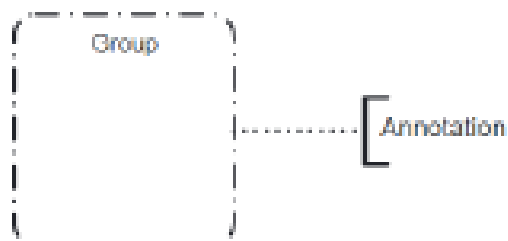


Figure 2.7: Types of artefacts - Source: (Object Management Group, 2010)

By looking at the figure above, there are two artefacts: group and text annotation. The first is used to join a set of activities while maintaining the diagram's flow. As for the text annotation, this offers information for a particular diagram component.

2.3 Robotic Process Automation

Robotic Process Automation is a rules-based approach that automates commercial processes by using computer programs that replicate human interactions to free them from repetitive work (Patrício et al., 2023). The IRPA-AI Institute defines RPA as *"the application of technology allowing employees in a company to configure computer software or a 'robot' to capture and interpret existing applications for processing a transaction, manipulating data, triggering responses and communicating with other digital systems"* (Enriquez et al., 2020). Even though the word "robot" conjures up images of electromechanical devices, it is vital to understand that RPA is a software-based solution (Lacity and Willcocks, 2016).

As previously mentioned, RPA is a developing trend in the restructuring of business processes and can be used in conjunction with digital transformation (Moreira et al., 2023), since it can help to address disruptive issues in many businesses, industries, and organizations (Afriliana and Ramadhan, 2022).

This technology enables anyone to set up computer software, or a "robot" to simulate and include a human user's interactions with digital systems to carry out a business process since RPA solutions do not need programming knowledge to configure software interfaces (Aguirre and Rodriguez, 2017). RPA robots utilise the user interface in the same way humans do to use apps and collect data. They can also conduct various repetitive tasks by interpreting, initiating reactions, and interacting with other systems (UiPath, 2023a).

RPA is an excellent addition to a business, but it depends on selecting the right processes to automate (de Moraes et al., 2022). In order to achieve this, it is essential to establish an optimal workflow throughout the enterprise and detect all bottlenecks. To do this, BPM is the ideal tool since it is a good strategy to detect bottlenecks and optimize processes. When this analysis is performed, it is possible to check if RPA can be implemented in the process (RPA and its Future). While performing this analysis, a process can be divided into four categories (UiPath Academy, 2023):

- No robotic automation - because they require frequent changes, unstable system environments, and numerous manual activities, these procedures are inappropriate for RPA.
- Semi-automation - the process and system environments remain static, but there are various manual duties in addition to computer-based jobs.
- High-cost automation - all activities are performed on a computer.
- Zero-touch automation - the systems and process environments used in the digital processes are very static. The applicable use cases include sophisticated computer-based operations.

In order to understand if a process is eligible for automation, it needs to meet specific characteristics, such as:

- Rule-based - these procedures should be carried out following predetermined business principles so that the employees are not required to make decisions.
- Standard inputs - the inputs required for the procedure should be placed in the exact location.
- Stable - these procedures ought to be constant for a period of time and are not anticipated to vary.
- Repetitive - the same steps should be used for all situations and transactions in processes that are anticipated to be automated.

After analyzing if a process can be automated, it is necessary to understand if it is eligible for RPA. In order to see this, it is necessary to take a look at the factors that are used to check the complexity of the RPA:

- Number of screens - a more complex RPA results from using more screens because more elements can be recorded.
- Type of applications - some programs, like browsers, are simpler to automate.
- Variations/Scenarios - a process's ability to take on more options will result in more sophisticated automation.
- Input type - the inputs should be standardized, as was already stated.

This technology can be a helpful tool that gives businesses operational and technical outcomes. Businesses employing it should anticipate various advantages, including less delivery risk, enhanced quality and accuracy, cost reduction, risk mitigation, flexibility, multitasking, and user interface-based application integration. In addition, because robots can work continuously, seven days a week, they boost availability and reduce the possibility of cross-organizational errors, leading to quicker results (Diepveen et al., 2016).

RPA technology can bring several advantages to businesses, being one of them the quick achievement of a high Return on Investments (ROI) (van der Aalst et al., 2018). This major advantage led several businesses from different areas such as finance, education, health care, intellectual property rights, supply chain management, privacy, security, and detecting fraud and scams to implement this technology (Chakraborty et al., 2022) while being aware that the majority of the jobs that an RPA is able to handle are back office or supportive tasks for their teams (Doguc, 2019), such as data entry, processing of common transactions, or answering basic customer service queries (Romão et al., 2019).

One of the industries that can have improvements performed by RPA technology in its processes is the retail industry, despite many of them being performed manually. Nevertheless, it is possible for companies in such industry to improve their accuracy and productivity through this

technology, more specifically, in customer support. For instance, in this field, RPA can track orders and provide the necessary update to customers at predetermined intervals. Besides, RPA can also be used in logistics and supply chain for this industry, by helping monitor the inventory, track the shipping history and communicate with customers/suppliers (PUICA, 2022).

2.3.1 Selecting Processes for Automation

As mentioned, not all processes can be automated, having to fulfil some requirements. In order to evaluate RPA candidates and rank them according to their automation potential, companies can use Multi-Criteria Decision Making (MCDM) such as Analytic Hierarchy Process (AHP) (Costa et al., 2023).

The AHP is a method that helps establish priorities and make the best decision when both quantitative and qualitative aspects of a decision need to be assessed (Costa et al., 2023) and is one of the most used decision-making techniques when the decision is based on several criteria (Mohammed et al., 2018). This method can be divided into four steps (Ishizaka and Labib, 2011):

- Problem modelling - this step hierarchically divides the problem into many criteria and options layers. The top-level criteria represent the main goal or objective, followed by sub-criteria and options at lower levels.
- Pair-wise comparisons - these comparisons are conducted between elements at every level of the hierarchy in this step. The elements may be alternatives or criteria, and a scale is used to rank them in terms of importance or preference. The Saaty scale, which runs from 1 to 9, is frequently used. On this scale, 1 denotes equal importance, 3 moderate importance, 5 strong importance, 7 extreme importance, and 9 extreme importance. Pair-wise comparisons are used to determine the priority weights of each element concerning other elements at the same level.
- Judgement scales - the priority weights for each element at each level are determined.
- Priorities derivation - this step aims to confirm the validity of the pair-wise comparisons. By contrasting the greatest eigenvalue of the matrix with its size, determine the consistency index (CI). Further changes can be needed to enhance the consistency of the judgements if the CI rises over a predetermined threshold (usually 0.1). Divide the consistency index (CI) by a randomly generated index value to get the consistency ratio (CR). The judgements are deemed sufficient if the CR is less than the threshold (for example, 0.1).

For RPA initiatives, AHP can be used to create an implementation roadmap. Decision-makers can utilise AHP to prioritise processes for automation by taking into account elements including process complexity, potential benefits, resource requirements, and organisational preparedness. This can serve as a roadmap for the RPA deployment process, ensuring that high-priority tasks are automated first for the most significant efficiency improvements and return on investment.

2.3.2 Business Analyst

For companies trying to improve efficiency and streamline processes, RPA became a game changer. However, a full grasp of the current business processes and workflows is necessary for RPA implementation, where a Business Analyst (BA) comes in.

Business Analysts can play a critical role in finding areas where RPA can be utilised to automate repetitive and time-consuming procedures since they are people used to assessing and optimising business processes. They may make sure that the automated processes are created in a way that fulfils the needs of the business and yields the highest ROI by collaborating closely with RPA developers. RPA and Business Analysts work together to ensure the technology is implemented as efficiently as possible. RPA provides the technology and automation, while Business Analysts provide the strategic and analytical knowledge.

The BA's job is to liaise between those who need a solution and those who will provide it (developers). Additionally, they are responsible for compiling all the process specifications from the business unit participants, confirming this data, and producing the documentation, which must cover the entire project's scope. Therefore, a thorough understanding of every business requirement is essential because BAs are responsible for transmitting knowledge from the business unit to the technical solution level, namely to the developers. Besides this, the BA's job may also imply acting as a consultant for the processes analysed to find an easier way to execute those processes.

The following are some of the actions a Business Analyst might perform (Taulli, 2020):

- Create documentation that precisely explains the project's objectives and the tasks that must be completed. The process design document is one, and it is frequently made with the assistance of RPA programmers.
- Consider strategies to enhance current business procedures. A Business Analyst will create an opportunity assessment document from this.
- Possess some knowledge regarding the technology to give better inputs to the business.
- Knows about analysing various RPA solutions.
- Collaborate with IT for integration, security, and governance.
- Create test cases to see if the RPA solution is accomplishing its objectives.
- Assist in building the Center of Excellence (CoE) - a group that aids in properly integrating RPA into the enterprise and distributing collected expertise and resources among upcoming deployments (UiPath, 2023b).

Overall, Business Analysts are essential to an organization's success. They are in charge of examining corporate procedures, identifying potential areas for development, and suggesting solutions that would enable firms to reach their objectives. Business Analysts can bridge the gap between business stakeholders and technical teams because of their particular skill set, which

combines technical proficiency with business understanding. Business Analysts assist firms in streamlining operations, cutting expenses, and increasing efficiency through their insights and recommendations. The work of Business Analysts will only become more crucial in assisting organizations to stay competitive and succeed as they continue to evolve and adapt to new challenges.

2.4 How to develop an RPA

The process of developing an RPA can be divided into the following six steps (Chacón-Montero et al., 2019):

1. Analysis
2. Design
3. Development
4. Deployment
5. Testing
6. Maintenance and operation

In order to go along with the previous flow, several roles must collaborate to deploy the customer's customized automation solutions. The roles involved in this flow build an automation implementation team, typically consisting of solution architects, project managers, Business Analysts, and automation developers (UiPath Academy, 2023). The BA plays a crucial role in the RPA flow since they are in charge of defining the business process that requires automation, analyzing the process steps, and determining the viability of automation.

Business Analysts work with stakeholders to understand their needs and identify areas for automation through the analysis phase, which is a vital part of the RPA cycle and where BAs actively participate. They record the business rules, process flows, and exceptions to decide which tasks best suit automation. They also perform a cost-benefit analysis to determine the potential savings from automation. Also, during the analysis stage, the BAs work with the technical team to design the RPA solution. They support while defining the automation's parameters, identifying its inputs and outputs, and documenting the operational guidelines and decision-making procedures that will guide the RPA process. Throughout the implementation of the RPA, BAs work closely with the technical team to ensure that the solution meets the client's expectations. Besides this, it is also part of the BAs' role to comment on the RPA workflows and make recommendations for improving the procedures. They could also assist with testing and confirming the efficacy of the RPA solution (UiPath Academy, 2023). The flow then moves on to the Design stage, where the Business Analysts' observations and documentation help guide the design of the RPA solution. After the Design stage, there is the implementation of the process. This last step aims

to implement each of the automatable process components found in the Design phase. Next, the robot is implemented and deployed in production in the fourth stage, which is called Deployment. Following this, the flow moves on to the testing step, which ensures that each robot behaves correctly once it is deployed in production. The primary objective of this stage is to monitor and regulate each robot's performance. Looking at this RPA flow, it is possible to see that robots are routinely implemented into production and evaluated to ensure proper functionality. However, before being used in production, all robots should preferably undergo testing in a test environment. With this difference, it is clear that this cycle is flawed since the testing phase is carried out in the actual production environment, putting that environment at risk. Finally, the flow goes to the Maintenance and Operation stage, which is responsible for maintaining the robot's functionality and fixing potential issues. In this stage, the robot's performance in a given process is also assessed (Chacón-Montero et al., 2019).

2.5 Key Performance Indicators (KPIs)

By using the pertinent Key Performance Indicators, it is possible to keep track of the processes' performance after they go live. KPIs are the instruments used to gauge a process's performance over time to achieve a particular target or goal, assisting decision-makers within the organisation (Martell et al., 2023).

KPIs are referred to as efficiency indicators or effectiveness indicators. The link between the resources utilised, and the outcomes is how efficiency is best defined and typically relates to expenses: the more cost-effective the process is, the more efficient it is. While quality is more closely tied to effectiveness: as closer the process is to the goals defined to it, the more effective the process is (Carmichael et al., 2002).

KPIs are intended to measure the efficacy and efficiency of a company's primary business goals. Therefore, it is crucially essential to define KPIs accurately when monitoring business processes to get the most information out of this monitoring activity and identify the greatest areas for improvement. Carefully chosen KPIs enable an accurate assessment of the state of the business process, revealing precisely where improvement measures should be implemented (Weber and Thomas, 2005).

KPIs for Robotic Process Automation (RPA) can be classified into several categories, each measuring different aspects of RPA implementation and its impact on business operations. Some of the KPIs that can be used for measuring an RPA success are (Bart Teodorczuk, 2021):

- Value of Time Gains (VTG) - this metric contrasts the cost of a process performed by human workers to a procedure performed by RPA bots.
- Return on Investment (ROI) - the overall financial return on investment from the use of RPA is assessed by this KPI. It weighs the expense of putting in place and sustaining RPA systems against the monetary returns made, such as cost reductions, revenue growth, and increased operational effectiveness.

- Expected Business Value - this metric is the total of all cost savings times the average FTE cost during a specified time period.
- Gained Productivity - it reveals how many FTEs were gained as a result of automating a specific process.
- Cost per Error - the average cost of an error that happened during a specific automation is covered by this metric.
- Budget Estimation Accuracy - compares the final budget with the budget projected prior to the deployment of an RPA.
- Process Automation Velocity - relates to the typical amount of time required to complete a task in an automated procedure.
- Bot Success Rate - the proportion of cases that the RPA created for the procedure has covered.
- Exception Rate — the proportion of instances that failed as a result of system or business errors, such as missing data or altered website layout.
- Process Automation Utilisation Rate - this indicator provides a summary of how much an RPA is used in the business' activities.

By monitoring and analyzing these KPIs, organizations can gain insights into the effectiveness of their RPA initiatives, make data-driven decisions for further optimization, and demonstrate the value and impact of RPA on their business operations.

Chapter 3

RPA status at FARFETCH

This chapter details FARFETCH's utilisation of RPA implementation and the benefits the business has made as a result. It is also feasible to comprehend the procedure followed in selecting the projects for this dissertation assignment.

Throughout this chapter, it is also possible to find the current RPA flow at FARFETCH and how it is implemented compared to the procedure outlined in the literature, as indicated in the previous chapter.

3.1 RPA at FARFETCH

RPA has been used by FARFETCH since 2021, and its adoption was motivated by the several advantages RPA can bring to a business, which were already mentioned in chapter 2. At the beginning of this implementation, the process of developing an RPA was done by two people who were in charge of the entire flow, which will be described in the following subchapter. With the recognition of the benefits RPA presented to FARFETCH, expanding the team responsible for this technology was essential. At the moment this dissertation was developed, the RPA development process was divided between two teams: the DAG team and the RPA team. The first one, composed of five BAs, is responsible for understanding the process to be automated, mapping it, and finding methods to perform the process in a more agile manner. When the BA has the necessary information, it is possible to prepare the documentation regarding how the process is executed so the DAG team can work hand in hand with the RPA team. This team comprises ten developers, which can be separated into two groups: one accountable for developing new RPAs and another with the ones in charge of performing the maintenance of already live RPAs.

FARFETCH began the implementation of this technology in the SE department, and until the date of this dissertation, 12 RPAs went live for COPS, 8 for CS and 9 for PS. In fact, the implementation of this technology at FARFETCH has been growing over time. From the beginning of the usage of this technology until April 2023, 40 RPAs went live. However, of the developed RPAs, 7 were cancelled, leaving 33 RPAs live as of April 2023. This decrease can be attributed to several things, including replacing the RPAs with a newer, more complex version or becoming

obsolete. Figure 3.1 shows an analysis of the number of RPAs that have gone live each month since this technology has been in use.

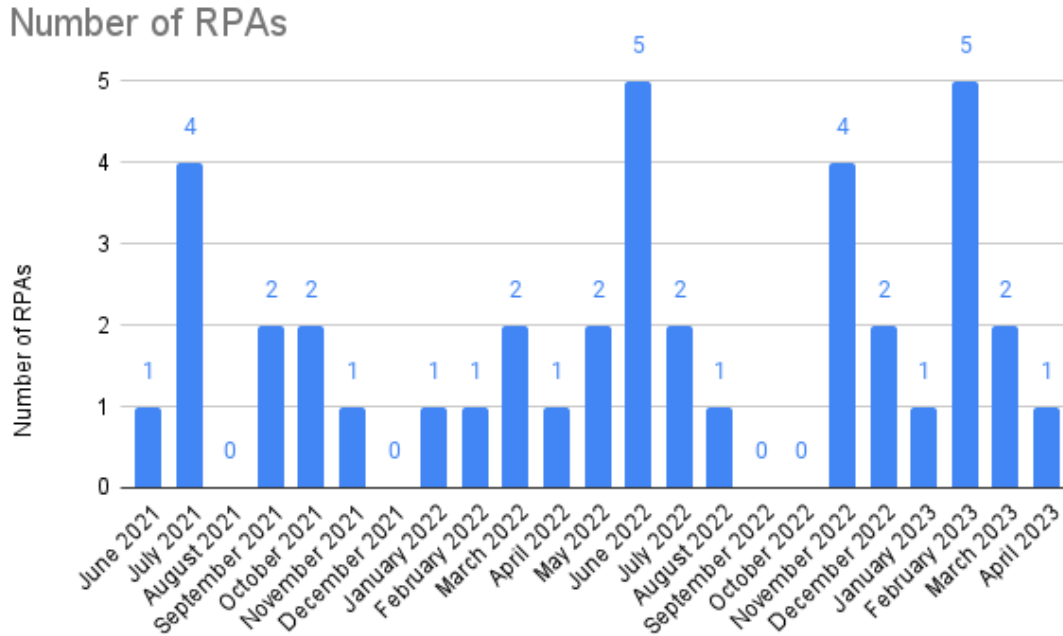


Figure 3.1: Number of RPAs that went live per Month

Figure 3.1 demonstrates that in some months, no RPAs went operational, which can be explained by the complexity of the RPAs being developed during those months, making it more challenging for the Automation team to implement them.

The implementation of the RPA technology at FARFETCH had an impact on the employees' number of hours - being this one of FARFETCH's KPIs for RPA - that were possible to be saved, which can be seen in Figure 3.2. Looking at the graphic, it is possible to notice that, since June 2021, FARFETCH was able to save approximately 21450 hours of employees' work.

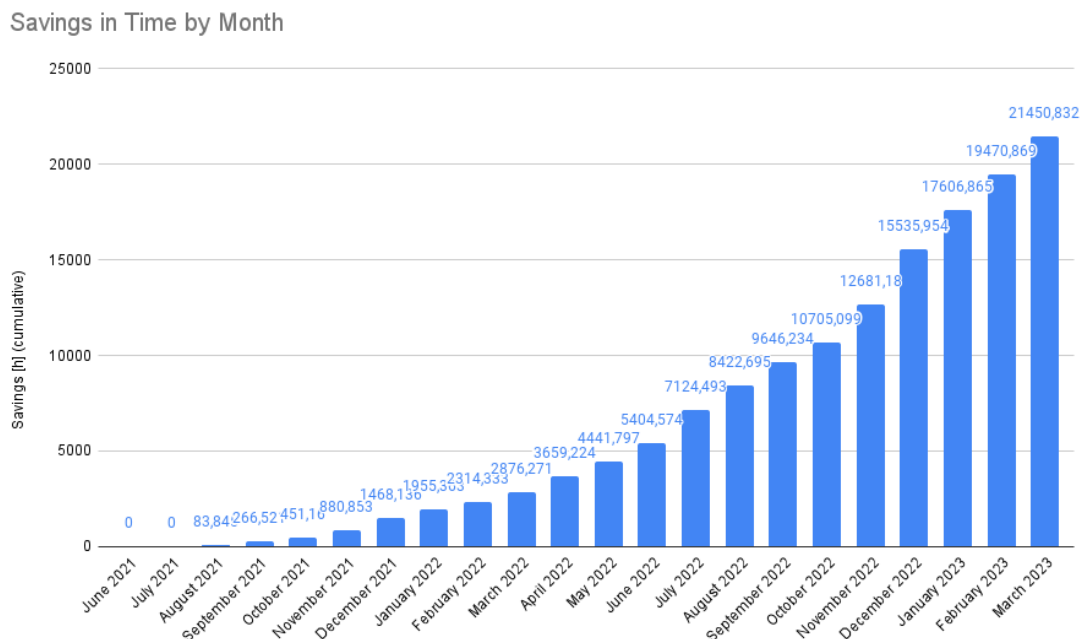


Figure 3.2: Amount of hours saved by Month since RPA implementation

By analysing Figure 3.2, it is possible to notice that the amount of hours FARFETCH managed to save through the implementation of this technology has been increasing over time. This fact is one of the many advantages RPA provides to the company, which may justify the increase in the use of this technology.

In addition to the number of hours saved by this technology, FARFETCH also expected that using RPA technology would increase their savings, in dollars/year. The amount of savings an RPA has is calculated considering the time each process takes to be performed and the number of times it is performed. For instance, a process that takes 10 minutes to be performed and is done 10 times per week it will have an expected savings of $10 \times 10 \times 52 / 60 = 86.67$ hours/year. In order to better understand what FARFETCH has managed to save due to this technology, Figure 3.3 presents the cumulative amount of savings in percentage month over month from the beginning of its implementation.

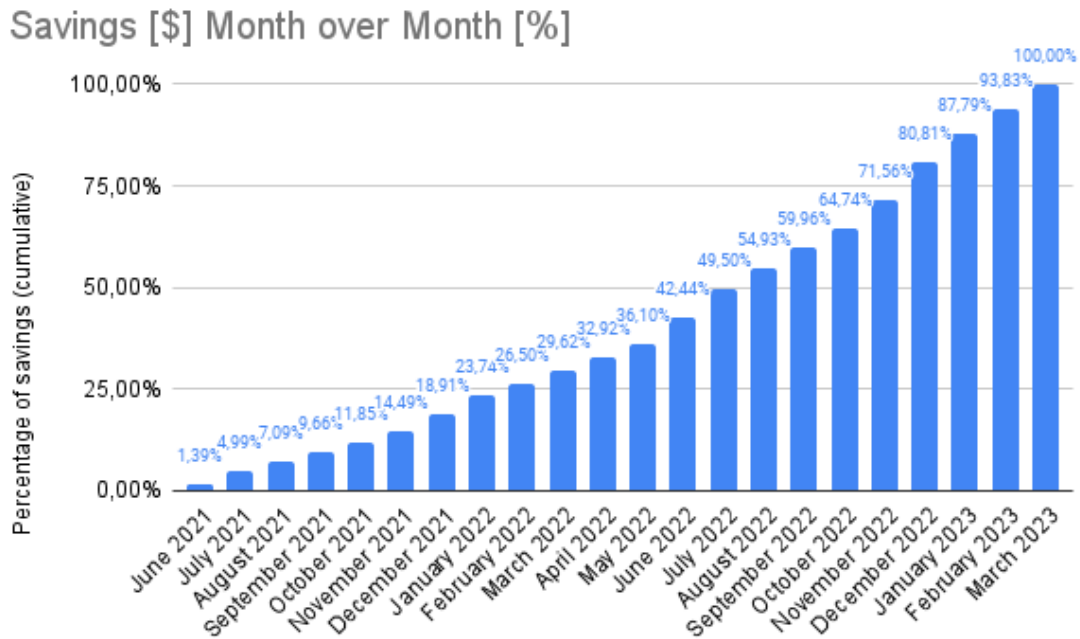


Figure 3.3: Percentage of dollars saved by Month since RPA implementation

This Figure enables one to conclude that the quantity of savings increased with time, with the highest growth corresponding to 9.15% from November to December 2022, which corresponds to FARFETCH's peak season. In fact, by taking a closer look at the graphic above, it is possible to see that the increases are higher in both peak seasons that FARFETCH has: from May to July and November to January. This can be explained since, in these months, the number of orders FARFETCH receives is typically higher, leading to more workload due to a higher number of contacts from customers and also a higher amount of work from the operations part, meaning that there is also more workload for the RPAs live at the company.

Besides the advantages mentioned before, by implementing this technology, FARFETCH also achieved more stable workloads and delivered the same level of service or a faster one to customers while freeing its employees to focus on projects that would genuinely help the company rather than waste it on non-valued tasks and repetitive work. In fact, it was created a dashboard to evaluate customer satisfaction (CSAT), presented in Figure 3.4.

CSAT

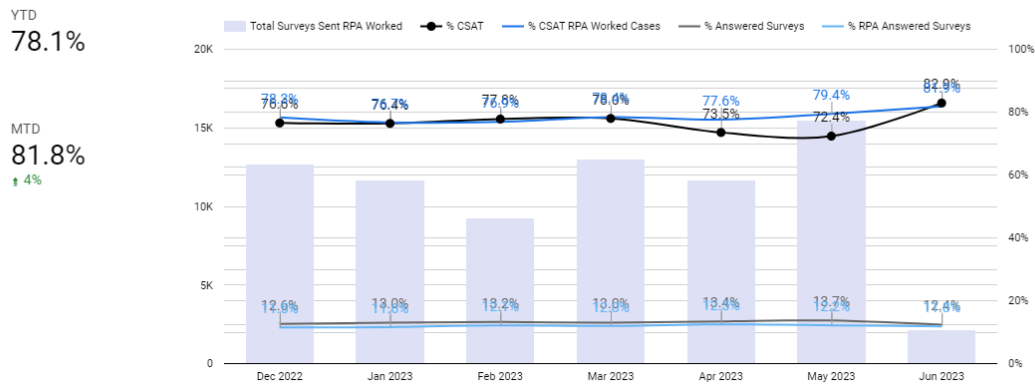


Figure 3.4: Dashboard for Customer Satisfaction

Every time a customer contacts the Customer Service team, the customer receives a questionnaire regarding the service level provided, which is represented in the %Answered Surveys in Figure 3.4. Besides, looking at the Figure, it is also possible to understand the percentage of CSAT, which, from December 2022 to June 2023, for the cases handled by RPAs was always above 75%, reaching 81.9% in June 2023. Besides, it is also possible to compare the total percentage of customer satisfaction with the percentage only regarding handled cases by the RPAs, which shows that the values are not very distant. However, in April 2023 and May 2023, the %CSAT for cases worked by RPA was higher than the total percentage. By having the dashboard presented above, it was possible to conclude that RPA was able to bring the same level of service, making it a suitable choice for the company.

With all of this, it is possible to conclude that implementing this technology brought several advantages to FARFETCH, which led to the desire to expand this technology to other departments inside FARFETCH since, up until March 2023, it was only supporting the Service Excellence teams. At the moment, and as it will be referred to in the following chapter, this technology is being expanded to the teams of Global Operations, such as CROPS and Supply Chain.

Overall, FARFETCH gained several benefits with the implementation of this technology, having its break even - the moment in which the amount of savings RPA obtained covered the amount needed for its implementation - 12 months after it was deployed. Besides this, FARFETCH also received a return on its investment in RPA technology of 1.65 dollars through March 2023.

All the statistics presented here were related to the implementation of RPAs in the SE department. Thanks to all the benefits RPA managed to bring to this department, FARFETCH decided it was vital to implement this technology in more processes inside the SE department, as well as other company departments. In order to evaluate which processes were able to see improvements due to RPA technology, it was conducted a high-level discovery in order to find such initiatives. As a result of this search, some of these initiatives were introduced in the DAG Team roadmap, which is represented in Table 3.1.

Table 3.1: DAG Team roadmap

ID	Business Case	Expected Savings (h)	Expected Savings (FTEs)	Effort	ROI
14	Booking	842.14	1.17	S	536.28%
18	Order Management	436.8	0.62	M	137.96%
25	Carriers and Shipping Configurations	96.0	0.14	L	-54.28%
26	Logistic Routes Creation	33.0	0.05	S	-74.89%
27	Commercial Routes Creation	292.2	0.41	M	40.00%
61	Address Change Request	774.4	1.08	M	182.70%
62	Locked Account	1293.73	1.80	M	369.75%
68	RTO Requests v2	7803.23	10.29	L	1984.35%
71	Access Management	1671.84	2.33	M	501.78%
92	Monitoring	396.0	0.56	S	261.27%
97	Goods Shipping	9622.8	13.41	L	3821.85%
113	Carryover	733.33	0.98	M	78.78%
116	Backlog Manager COPS	2687.72	3.59	S	961.22%
118	Returns Management	792.0	1.11	XL	150.65%
124	Browns Editing	633.6	0.84	L	34.81%
144	Boutique Find Items	1516.0	2.12	M	848.58%
145	Boutique Transfers	440.0	0.62	M	168.27%
150	LMP vs Geopricing	6072.0	8.01	S	2180.24%
176	Reporting	5977.8	7.89	L	1091.92%

Table 3.1 shows that every initiative present on the roadmap was compared regarding the amount of savings FARFETCH expects to have in hours/year and in full-time equivalent (FTEs), which represents the number of employees that would see an increase in their free time to perform added-value tasks. It is essential to point out that the values for these savings are not the ones FARFETCH indeed expects since they were masked due to the fact that it is confidential information. Besides these, the initiatives are also compared between them through each initiative's effort and the ROI percentage. As for the effort, it was used the T-shirt Size approach to perform the evaluation for each initiative. This approach consists of an agile methodology that makes use of relative estimation and it states that products of comparable sizes are grouped together. For comparing the effort of each initiative in the roadmap, it was used 4 different types of categories: S, M, L or XL. Each of these is associated with the number of days the initiative will likely need to be developed. Therefore, S will be assigned to initiatives that take approximately 10 days to develop, M from 10 to 15 days, L from 15 to 20 days, and XL to more than 20 days.

In order to perform a better choice regarding the four initiatives to develop during the project for this dissertation, the information presented in the previous table was translated into the graphic presented in Figure 3.5¹.

¹Initiative 118 is the only initiative with an XL effort on the team's roadmap which led to the exclusion of a row for the XL effort. This decision made initiative 118 be on the top of the row for the L effort.

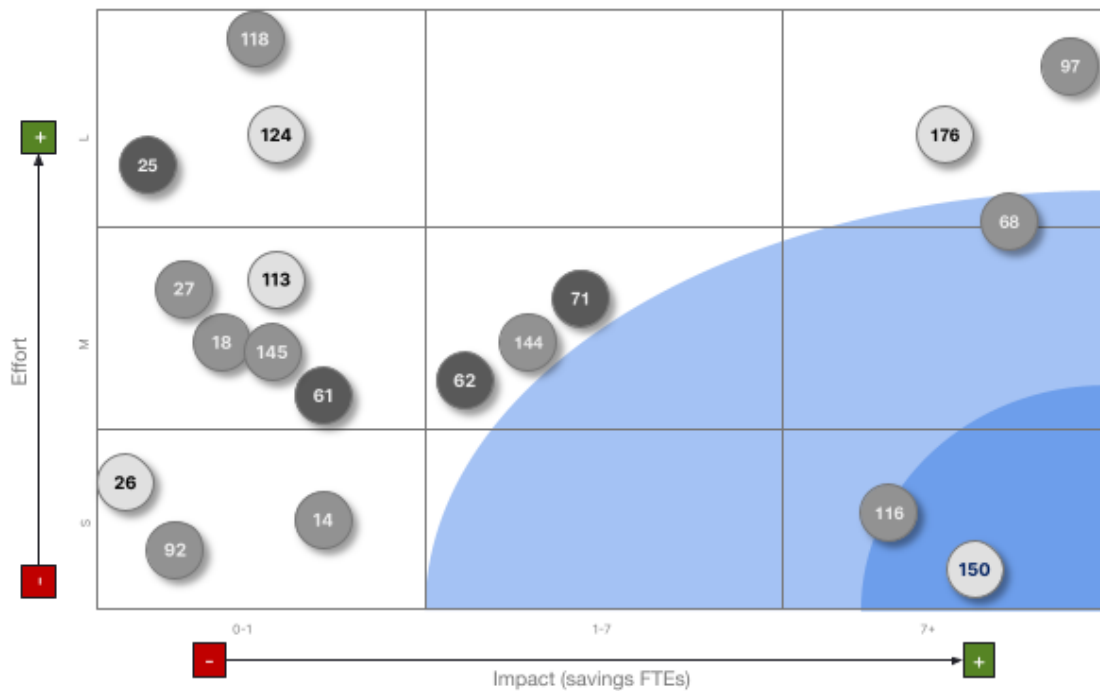


Figure 3.5: Graphic with the DAG Team roadmap

By analysing the graphic above, it can be seen that the factors used for comparing the initiatives are the Effort and the Expected savings (FTEs).

With this graphic, it became clear that one of the initiatives to choose was the 150, referring to the LMP vs Geopricing process. This decision was taken into consideration as it is one of the initiatives with the highest expected savings in FTEs (8.01 FTEs) while also having a low effort to develop it (S). Besides this, by looking at the table, this initiative is expected to save 6072 hours/year and also has an ROI of 2180.24%. Following this choice, looking at the other initiatives that also have low effort, initiative 116 - Backlog Manager COPS - was chosen since it is the one that has the highest amount of savings from this group. Besides this, it is also the initiative that presented the highest expected savings in hours/year and ROI from the three of them, having 2687.72 hours/year and 961.22%. After these two initiatives were chosen, it was decided by the business that the other two initiatives to be developed would be the 68 and one of the 25, 26 or 27. Despite requiring a higher effort (L) from the development part compared to the initiatives already chosen, initiative 68 - RTO Requests v2 - has one of the highest expected savings (10.29 FTEs). Besides this, this initiative was also pointed out as a priority from the business since it is a second version of an already live RPA, making it advantageous for the business to have it since it would be a more complex version of the first RPA. Finally, initiatives 25, 26 and 27 were prioritized by the business, despite none of them delivering much savings when compared to the already chosen initiatives, because these three initiatives comprise a process that aims to integrate new partners into the FARFETCH carrier and shipping configuration process, which is a process that usually takes 7 weeks to be performed. Looking at the graphic to compare these three initiatives,

it is possible to conclude that initiative 27 - Commercial Routes Creation - should be developed first. The DAG Team made this decision based on the fact that this is the bottleneck of the whole process and it is also the one with the highest expected savings in FTEs and hours/year, as well as the percentage of ROI.

3.2 RPA Flow at FARFETCH

When RPA technology first arrived at FARFETCH, its implementation was a total responsibility of the RPA team since the DAG team did not exist yet. Since then, defining the process flow that the RPA implementation should follow has been essential, and it has suffered several changes over time for the flow to be as efficient as possible. The current flow used at FARFETCH can be divided into four stages: the business case stage, the process documentation stage, the implementation stage and, finally, the maintenance stage, which will be described in detail further in this subchapter.

In order to perform these stages, several people need to work together:

- Business Analyst - this is the person responsible to be the connection between the business team and the RPA team since it is the person that kept in touch with the business in order to better understand the process and improve it.
- Process Owner (PO) - the person from the business team that is typically in charge of performing the process in analysis and helps the BA during the process of improvement.
- Subject Matter Expert (SME) - typically the person in charge of the team that performs the process to be automated.
- RPA team - this comprises the developers in charge of implementing new RPAs and performing the maintenance of already operational ones. In the flow, the RPA team lane represents the developer in charge of the initiative.
- Data Team - delivers the necessary data for the development of the Business Case (BC), such as information about the volumes over the past 12 months, the percentage of volume during peak hours, and the Average Handling Time (AHT). In order to better understand the importance of the data this team provides, it is necessary to know what these values refer to: the first value regards the total number of cases handled in the process being analysed; the second value refers to the number of cases handled during FARFETCH's peak season - this value is essential because it is typically during this time that the number of orders FARFETCH receives increase, which usually leads to a higher number of contacts from customers and also it will imply a higher amount of work from the operations part; finally, AHT is the time a person typically takes to handle the process from begging to the end.
- ROI&SG&A Planning team - this team is asked to deliver the ROI analysis with the help of the data provided by both the Data and RPA teams. The ROI analysis consists of the

expected savings in hours/year, FTEs and dollars/year, savings after costs, maintenance costs, costs per workload and ROI. The analysis performed by this team allows the business to evaluate if this initiative is approved or not to proceed with the development of an RPA.

All these people come together in order to deliver the best BC possible. The process flow of the Business Case Stage is depicted in Figure 3.6.

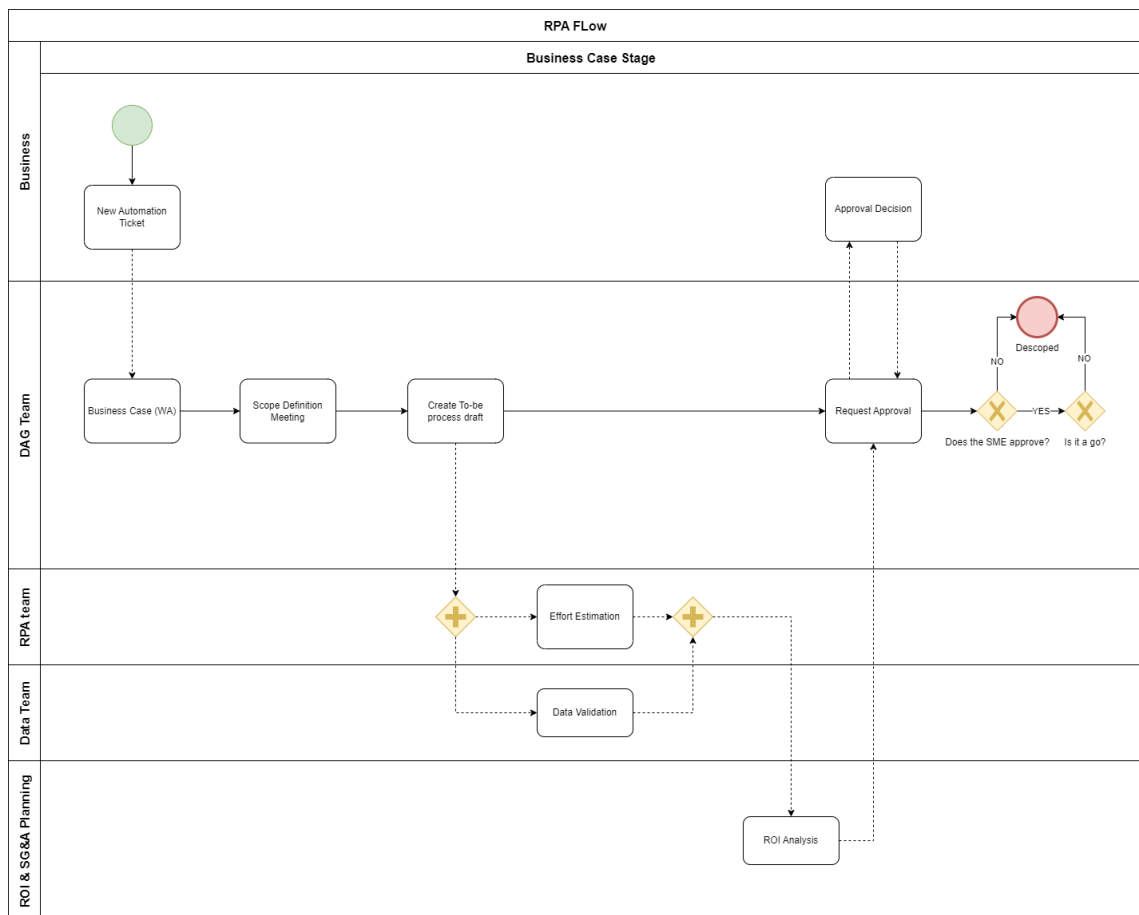


Figure 3.6: RPA Flow at FARFETCH - Business Case Stage

Figure 3.6 shows that the trigger for the RPA flow is the creation of an automation ticket by the business team, in which the business briefly explains the process they would like to be automated. Besides this, in the ticket, the business may also justify why the process can be automated, for example, if it is a repetitive task. The DAG team then acknowledges the ticket and the Business Case Proposal is then developed, which can be separated into different steps:

1. Scope Definition Session - in this meeting, the PO demonstrates how the process is done, making it possible to outline the as-is process. In this session, the to-be of the RPA is also discussed because this is when the process's activities and potential business exceptions are specified. The BA also aligns the RPA's triggers, representing how the RPA is initiated and can be in the form of a Salesforce (a Customer Relationship Management (CRM) system

utilized by FARFETCH to handle interactions with our partners and internal teams) case, a JIRA (a project management tool) ticket, time, an email or a Slack - FARFETCH's internal communication platform - message. Besides the RPA triggers', the BA also aligns its assignment type since it can be manually assigned - if someone assigned the task to the RPA manually - or auto-assigned, meaning that the RPA identifies the task to perform.

2. Effort Estimation - after the to-be process is mapped and all the activities performed are described in the BC, the developer is asked to give an estimation of the time it will take to develop the RPA without taking into consideration the refinement and hypercare of the implementation. This information will then be used for the ROI analysis.
3. Data Validation - information regarding the data previously mentioned is provided by the Performance & Analytics Team. However, there are cases in which this team does not have the required data due to, for example, the process being a new one. In such cases, SME will provide the data needed and also the Expected Adoption (%) and the AHT Reduction (%) percentages. The first value refers to the percentage of cases the business expects the employees to assign to the RPA if it is a manually assigned RPA; if it is an auto-assigned RPA, this percentage is set as 100%. As for the AHT Reduction, it is the percentage of time it is going to be saved with the RPA when compared to the manual procedure.
4. ROI Analysis - The ROI&SG&A Planning team will provide feedback based on the data acquired in the Effort Estimation and Data Validation regarding Expected savings in hours/year, FTEs and Expected savings dollars/years, Savings after costs, Maintenance costs, Cost per Workload, and ROI.
5. Business Case approval - after the Business Case Proposal is finished, it will be forwarded to the SME and RPA Lead, and when approved by both parties, it is necessary to decide if this proposal is a "Go" or a "No Go". If the proposal is not approved, the BA will redo the process. However, the BC can be descope, which may happen for two reasons: the business decides it is no longer a priority to go ahead with the initiative, or the ROI analysis shows that it is not worth proceeding with the RPA. The "Is it a Go?" decision can be influenced, for example, by the priorities defined by the business. If the proposal is a "Go", the RPA flow continues to the next step, being descope if the decision is a "No Go".

Following the Business Case Stage, the proposal will move to the Process Documentation Stage, illustrated in Figure 3.7.

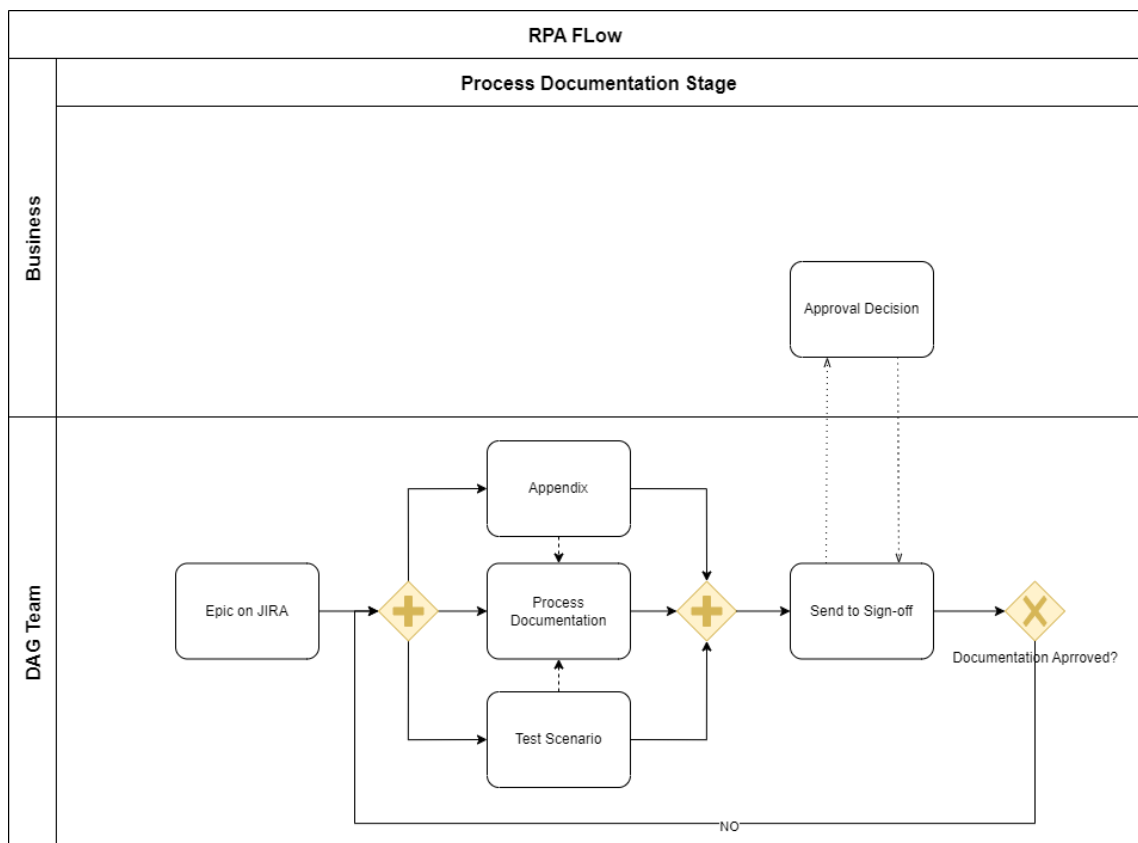


Figure 3.7: RPA Flow at FARFETCH - Process Documentation Stage

In this stage, the DAG Team can begin the creation of the RPA's Process Documentation (PD) on Confluence - an online workspace that allows cross-team collaboration, communication, and productivity. Numerous meetings with the Business Team may occur through this stage to clarify questions that may arise and obtain the information required to finish the documentation (such as print screens, examples, and templates, among others).

The BA, along with the PO, will also complete the Appendix file in this phase with the results (success, return reasons, and business exceptions), required templates, and other crucial details for the RPA implementation. Also, at this point, the Test Scenarios file, needed to complete the Hypercare phase, will be established by the PO, who will give all the scenarios the RPA must handle and also the minimum success rate - the percentage of the outcomes the RPA got that are the same as the ones said by the business - and minimum test coverage - the minimum percentage of possibilities present in the file that the RPA should perform for Hypercare to be completed. This stage only happens in the Implementation Stage, so the use of the Test Scenarios File will be described later in this chapter.

Once the PD, Appendix and Test Scenario File are approved, the flow can continue to the final two stages of the RPA flow: the Implementation Stage and the Maintenance Stage, explained in Figure 3.8.

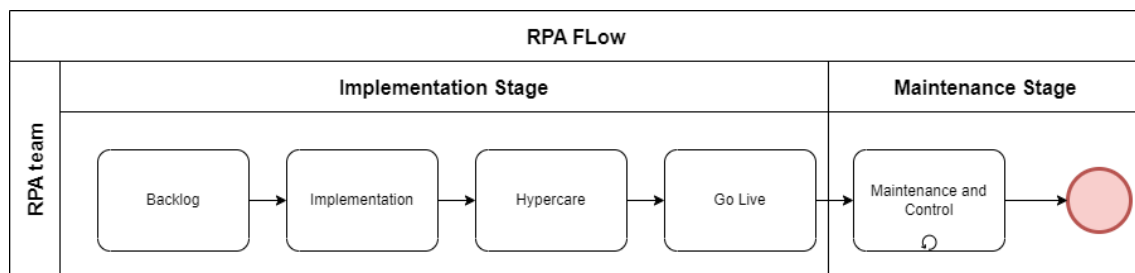


Figure 3.8: RPA Flow at FARFETCH - Implementation and Maintenance Stages

The initiatives that already went through the previous stages enter the RPA Team backlog. However, the RPA Team develops according to the priorities defined by the business. After analysing the RPA to start developing, the team can begin the Implementation Stage, composed of the Implementation, Hypercare and Go Live steps. The first step can be divided into two phases: the Design phase, in which the developer designs the solution based on the process documentation and creates tasks in JIRA with all the necessary developments to implement the initiative, and the Developments phase, where all the tasks mentioned are developed. Once the Implementation step is completed, the flow continues to the Hypercare step, in which the automation testing happens in a productive environment. In this environment, the developer uses the previously described Test Scenarios File to check that the RPA accomplishes matches the minimum success rate and test coverage. If both these percentages are met and the sign-off of the business is given, the RPA flow can continue to the Go Live step, in which there is the User Acceptance Testing (UAT) and after the RPA becomes operational. The UAT phase involves testing the automation solution to ensure that it meets the business requirements and is acceptable to the end users. However, the RPA team does not perform this phase since the team does not have the environment to test the process end to end.

Finally, when the Implementation Stage finishes, the RPA flow continues to the Maintenance Stage, which only has the Maintenance and Control activity. It is in this activity that it is ensured that the automation is running as expected (Controlling) and that the necessary updates and corrections are made.

So far, the flow described regards the usual RPA flow in the case of a new automation initiative at FARFETCH. However, a different path, shown in Figure 3.9, could be performed, which is only possible for RPAs that are already operational.

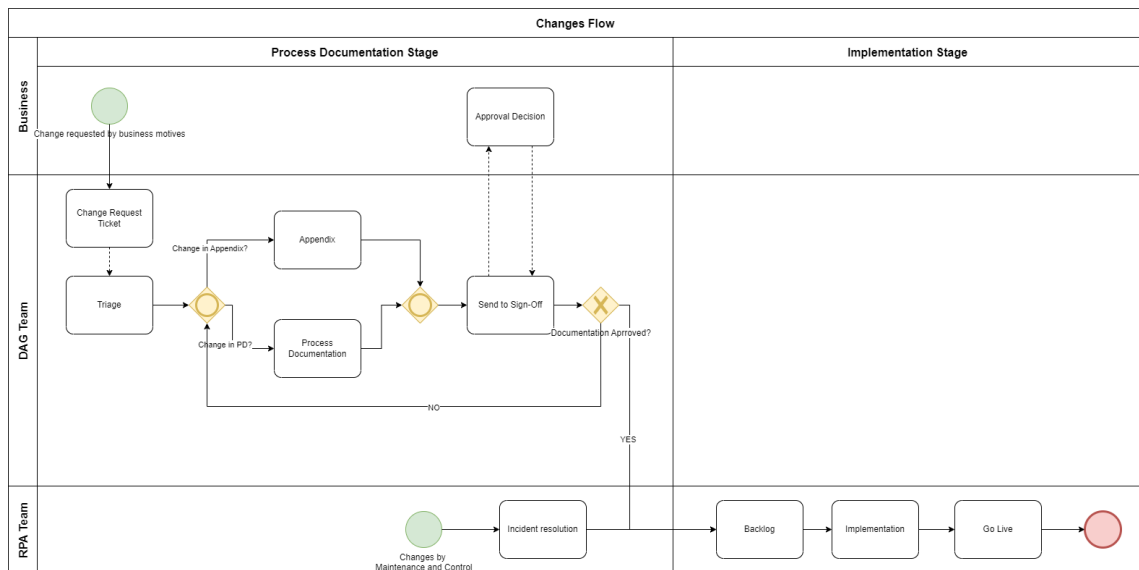


Figure 3.9: Changes Flow at FARFETCH

Figure 3.9 shows that this flow can be triggered by two events: an incident during the Maintenance and Control step or the business submitting a Change Request ticket. In the first case, the developer responsible for doing the RPAs’ maintenance will analyse the issue that could lead to the incident and make the necessary adjustments to the RPA to work correctly. When this is finished, it will again immediately enter in the Implementation step, continuing to the Go Live step. As for the case when the Business Team acknowledges they want to make any change on the RPA, they need to submit a Change Request ticket where it is specified the type of change they would like to implement. The DAG Team will then analyse the ticket to understand if the required change affects the Appendix or the PD. Once the change is documented, it needs to be asked for the SME’s approval in order for it to be able to move to the Implementation step and then the Go Live step. In both cases, the developers responsible for the RPA maintenance will perform the necessary adjustments on the RPAs in an order defined according to the business priorities. To put it another way, every 15 days, they have a sprint where it is defined the incidents and Changes Requests they will address in the following 15 days according to the business priorities.

Chapter 4

RPA's development strategy

This chapter focuses on the implementation approach used for the RPAs developed in this dissertation's scope. Each section includes a brief synopsis of the procedure before and after the implementation of the RPA and a brief explanation of what the RPA is intended to accomplish.

4.1 LMP vs Geopricing

The LMP vs Geopricing RPA aims to perform the process executed by the Production Delivery Manager team, which is a team incorporated into the CROPS department. This process regards updating, for some brands, the Local Market Price (LMP) based on the Geoprice (GP), which is the price shared by brands for a given region. As such, the automation of this process aimed to reduce the manual work of this team.

In order for this process to be conducted, the brands would create their product on STORM - a web platform that makes order tracking easier since it contains crucial details about orders, such as order item details, customer details, payment details, delivery details, and order status, acting as FARFETCH's catalogue - and set the LMP, which is a mandatory field for product creation on the platform, as 0. Doing this prevents the items from going online unless this "0" price is changed. Meanwhile, when brands share the Geopricing by email as an Excel file, another team uploads these into the system. When the Excels are finally uploaded, the Production Delivery Manager team runs a script created for this process, which generates several Excel files that contain the LMP. Once the files are generated, each is uploaded in STORM to check if the LMP corresponds to the GP. If this does not happen, the LMP price remains equal to 0, preventing the item from going online.

The need for this process to be automated came from the fact that brands create their product daily, meaning that a new LMP will have to be updated, making this a time-consuming and repetitive process. Besides, this automation also would reduce manual work and human error in the updates and get items impacted by lack of LMP for the minimum possible time.

The RPA developed to perform the process described did not follow the RPA flow defined in the previous chapter since it did not start with the submission of an automation ticket by the

CROPS team. Instead, it fell under the RPA's scope because it was selected, among others, in a high-level discovery of possible automatable processes, as it was described in chapter 3. The LMP vs Geopricing process was one of the chosen for this dissertation project, apart from the reasons already explained, because it was straightforward, repetitive and time-consuming, taking approximately 275s to run the query and 90s to upload each file generated, making the team execute this process twice weekly.

Once the decision to proceed with the implementation of the RPA for this process was made, the first step in developing it was to have the Scope Definition meeting with the Process Owner. In this session, the PO demonstrated the process from beginning to end, making it possible to conclude it was a simple process that was very time-consuming for the Production Delivery Manager team since it was simply running the script previously mentioned and uploading the files on STORM one by one. This meeting made it feasible to comprehend better the process and what activities the RPA needed to accomplish in each scenario. Besides, it was also discussed the frequency this RPA should be run since the PO performed this two times per week, as already mentioned, being accorded that the RPA would operate daily. It was also decided that the RPA would deliver daily information regarding the success or failure of each file upload so that the team could be aware of the RPA's performance. For the RPA to do this, it was suggested the creation of a group message channel in Slack, where the RPA would send one message per file uploaded.

Following this meeting, due to all the details the PO showed, it was possible to map the as-is process, as presented in Figure 4.1.

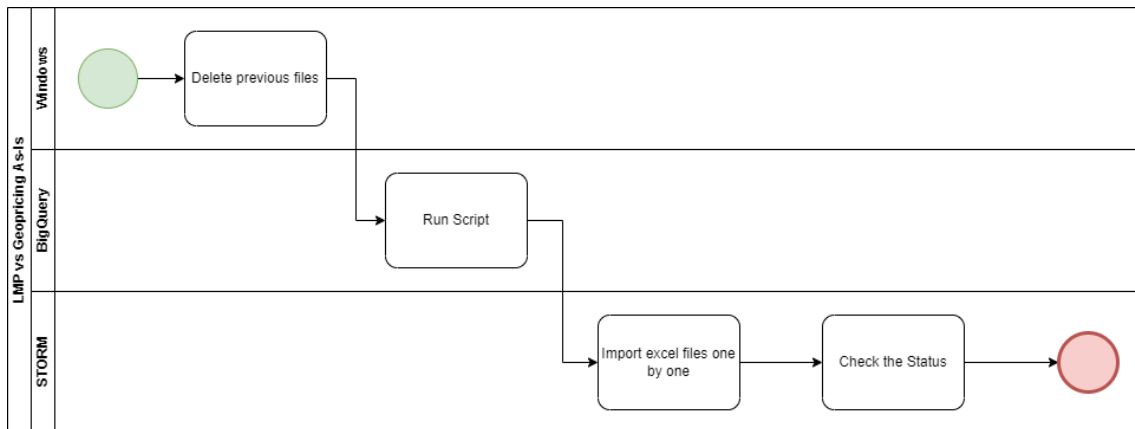


Figure 4.1: LMP vs Geopricing process before RPA implementation

Following the first meeting with the business, which allowed the as-is process to be mapped and the possible to-be defined, it was necessary to consult the development team to check if performing the to-be discussed was feasible. After giving the necessary details to the developer for the process to be understood, the task mentioned above regarding sending a message was discussed. It was suggested the creation of a Google Drive folder where the files would be kept for one week before being removed, making it more beneficial to the business since they would have access to the data for a more extended period and could verify any file at any time. Additionally, this folder

would enable the RPA to send a single message to the Slack channel with the Google Drive folder link containing all the information required instead of several messages, one per file generated. Besides this, in the meeting with the developer, it was possible to notice one problem in the process: the script used by the CROPS team was not qualified to be used in the RPA technology. For the developer to understand what the script executed and the type of files it generated, a meeting was arranged between the developer, the BA and the responsible for developing the script. By the end of this meeting, the developer understood what needed to be done to have the same type of files, so a query designed for the RPA was developed.

After presenting the solution regarding the Slack message to the business, it was possible to map the to-be of the process, shown in Figure 4.2.

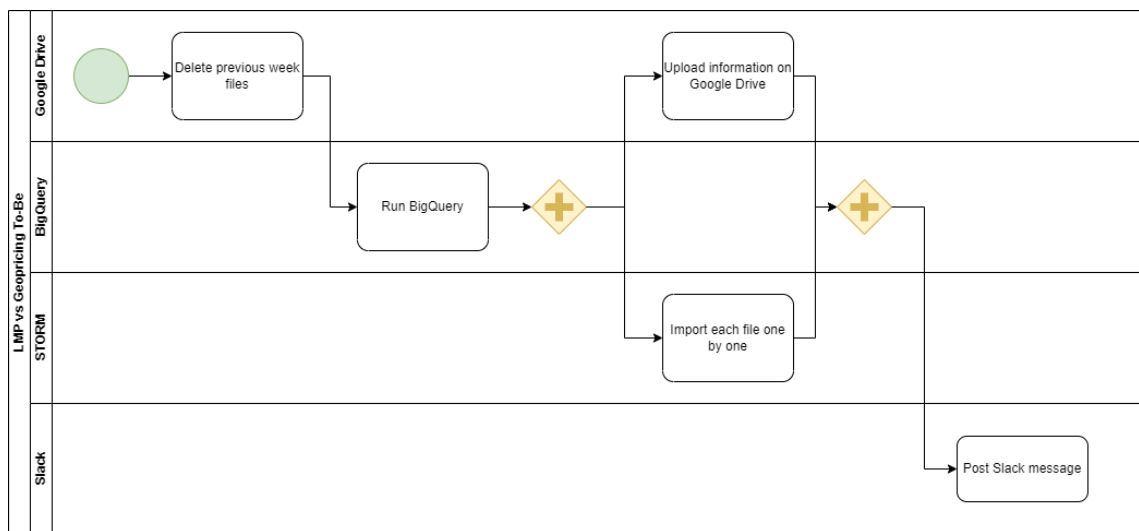


Figure 4.2: LMP vs Geopricing process with RPA implementation

Once the to-be of the process was mapped out and the PO approved the proposed changes, it was possible to develop the Business Case for the LMP vs Geopricing RPA - which can be seen in Figures A.1 and A.2 from Appendix A - and follow the typical RPA flow. In this BC, it was thoroughly detailed every activity this RPA aimed to perform. For instance, in this document, it is possible to know each step the RPA must perform: where the files to be deleted are, when to run the query developed, the page on STORM to upload the files generated, as well as the RPA’s response to each potential obstacle, such as the case where it was impossible to upload a file after trying to do it three consecutive times.

When every RPA activity was detailed in the BC, the next step in developing it was to ask for Effort Estimation and Data Validation to gather the data needed for the ROI analysis. In order to accomplish this, two separate tickets had to be submitted: one to the RPA team asking them to review the activities present in the BC in order to estimate how long it would take to develop this RPA, and another ticket to the Data team asking them to provide information on the number of cases handled by the employees in the past 12 months similar to the ones this RPA would

handle as well as the average handling time (AHT) an employee would spend with cases that this RPA could perform. Once both teams provided the values asked, the ROI&SG&A Planning team could perform its analysis, which made it possible to determine that implementing this RPA would expect savings of 2141.33 hours/year.

The following stage was to ask for the SME's approval and to see if this RPA was a "Go" or a "No Go". Once it was determined as a "Go", it was feasible to continue the RPA flow, moving forward with the creation of the Process Documentation and the Appendix and Test Scenarios files.

The RPA's PD is typically divided into the process's main activities to make it easier to understand what the RPA should perform in each one. In the case of this RPA, the first main activity regards the files that need to be deleted in the Google Drive folder that was created specifically to store them, and it was also detailed that the files need to be deleted after one week of their creation. Following this activity, it was explained that the RPA needs to run one of two queries created by the developer to get the partners that need to compare LMP and GP. Once all the partners are retrieved from this query, it was necessary to detail the RPA to execute the second query, which would generate the files for each partner and store them in the Google Drive folder. Additionally, in this main activity, it was reported the format the file name should be and what the RPA should do if it was not possible to run this second query. Once this activity was explained, it needed to be detailed the procedure to import the generated files into STORM - on which page they should be uploaded and the required steps to import them. Every time a file is uploaded, there is a field that reports the status of the file - it can be "Success", "Error", or "Failed" depending on the results derived from comparing LMP and GP - and this was also detailed in this main activity in order for the RPA to know the message to send to the created Slack channel. For instance, if the status was "Success" or "Error", the RPA should send the message containing the link to the Google File folder. However, if the status is "Failed", the RPA should retry to upload the file three more times and only after the third attempt send the message. All of these can be seen in Figures A.3, A.4, A.5, A.6, A.7 and A.8 from Appendix A.

Once the PD was completed and also the Appendix and Test Scenario files, it was asked for the PO, SME and developer's approval. When this was given, this RPA entered the backlog of the RPA team, and according to the business priorities, it will follow the RPA flow.

For the time this dissertation was written, it was not possible to see this RPA live due to the previously mentioned business priorities for the RPA Team backlog. However, it is possible to estimate the number of hours possible to save if this RPA was live by using Equation 4.1.

$$\text{Saving (h)} = \text{Workload} \cdot \text{Time Needed to Handle a Case} \quad (4.1)$$

According to the values given by the Data Team upon the Data Validation step of the BC, this RPA is expected to handle 21120 different Excel files and upload them in STORM. As for the time it takes to run the query and upload each file, this was estimated to be 365s. With these estimations, it is possible to do the calculation based on Equation 4.1, which gives an expected saving of 2141.3

hours/year if the RPA was live. However, in order to see if one of the objectives was accomplished it was considered that it would take one month for the RPA to go live and calculate the savings it would generate in the months of April and May, which would be approximately 356.9 hours.

4.2 Backlog COPS

The Backlog COPS RPA was developed to resolve cases with specific requirements defined by the COPS team and that were present in the agents' backlog. Each agent on the team had his own backlog of cases composed of pending cases, which they would examine once they had the information needed or when it was needed since in some cases the agents simply needed to monitor it.

This initiative was created to give support to the COPS team, which is typically reached by the other CS teams, making the implementation of this RPA beneficial for more teams than just COPS. With this RPA implemented, the COPS team would see their cases being solved more rapidly, reducing the CS agents' backlog quicker and making them more available to solve other cases. So, it is possible to understand that the agents in the CS team would be impacted by this RPA's faster case resolution because they would have the opportunity to conclude the case on their end more quickly since the COPS team also would be able to close the case more rapidly on their end, making this initiative advantageous for the CS team as a whole.

Once it was decided to develop this initiative present in the DAG Team backlog, it was necessary to arrange the Scope Definition meeting with the PO. In this session, it was shown the process from beginning to end: after identifying the Salesforce case, the PO would find the delivery country of the order for the case it was needed to identify the carrier by country and read the order's tracking number. Once the PO had this information, it was necessary to search for the order on the corresponding carrier's website, and post a message on Salesforce or send an email to the carrier depending on some requirements the business has.

After this meeting with the PO, it was possible to map the process, as shown in Figure 4.3.

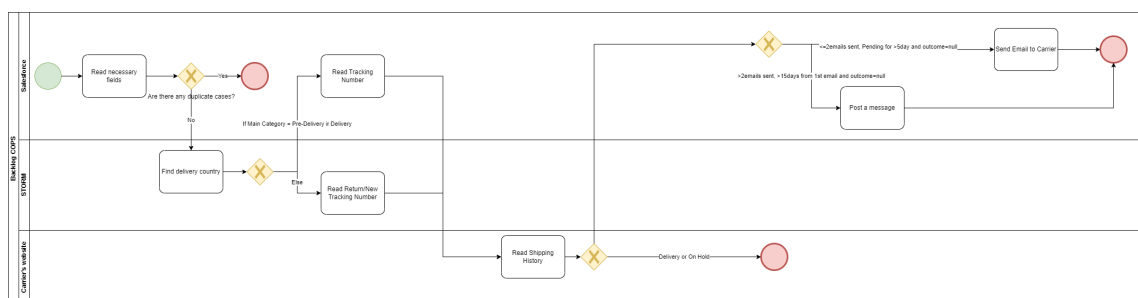


Figure 4.3: Backlog COPS process

While analysing the process, it was possible to notice that this RPA would select all the cases that fulfilled the requirements defined by the business, but some of them did not require any action from the RPA because the RPA would only resolve cases for specific carriers. This led to the

proposal of dividing the RPA into two: one responsible for finding the cases that really should be handled by the RPA until the end - Backlog Finder COPS - and the second one responsible for performing the activities - Backlog Manager COPS.

After showing this solution to the PO and having the approval regarding this division, it was necessary to create one BC for each RPA. Once every activity in both BCs was thoroughly explained and what the RPA should do for each step back that was likely to occur, it was requested the Effort Estimation to the RPA team and the Data Validation to the Data team for each RPA, similarly to the procedure in the previous RPA described. Both BCs developed can be seen in Figures B.1 and B.2 - for Backlog Finder COPS - and Figures B.10 and B.11 - for Backlog Manager COPS - from Appendix B. Once both teams gave the required data, it was possible to check through the number of cases handled by the agents in the past 12 months that having two RPAs would be more beneficial than having only one, as initially thought. These numbers show that, for the Backlog Finder COPS, this value was 278114 cases, while for the Backlog Manager COPS was 96219 cases. Analysing these values shows that if the decision to divide the initial RPA in these two was not made, there were 181895 cases that the RPA would have considered but would not perform any activity.

When both the RPA and Data teams gave their inputs, it was possible to ask for the ROI analysis from the ROI&SG&A Planning team. With the input of this team, it became achievable to analyse that, with the implementation of the two RPAs, it was expected savings of 2687.72 hours/year.

Similar to the previous RPA, the PDs for both Backlog Finder COPS and Backlog Manager COPS were divided into main activities. For the Backlog Finder COPS - presented in Figures B.3, B.4, B.5, B.6, B.7, B.8 and B.9 from Appendix B -, it was necessary to have a main activity that mapped the fields the Salesforce case needed to have for the RPA to find it. After this, the second main activity regarded the fields the RPA should read from the Salesforce case in order to be able to complete its path, and it was also in this main activity that it was determined that the case should be ignored if the carrier was not one the business instructed for this RPA. The third main activity was to check the order's tracking number so that the RPA could insert this information into the carrier's website to check the order status. If the status coincided with what the business required, the RPA would check the number of emails that were already sent to the carrier as well as the time interval between each email sent. If the status was one of the possibilities told by the business, this RPA would assign the case to the Backlog Manager COPS RPA, being ignored if it did not fulfil the requirements of the business.

As for the Backlog Manager COPS RPA - presented in Figures B.12, B.13, B.14, B.15, B.16, B.17, B.18, B.19 and B.20 from Appendix B -, this was supposed to change the status of the case to "Pending" on the first main activity so that the team's agents would know the case was being treated. After this, the second main activity was for the RPA to perform some validations to the Salesforce case so that it was escalated to an agent if any of the required fields was missing, to check if there was any duplicated case. If everything was right, the RPA would search for the order on STORM to find the order's delivery country. Once the RPA had this information, it would read

the order's tracking number and search it on the carrier's website to check its status. Depending on the status and the number of emails already sent to the carrier, this RPA would perform its last main activity: post a message on Salesforce or send another email to the carrier, finishing the process.

While working on the PD, completing the Appendix and Test Scenario files was also necessary. Since the Appendix file contains all the supplementary information, such as the templates required to be sent to the carriers or the recommended emails, it was necessary to complete it simultaneously with the PD. Once completing these, it was required to request approval from the PO, SME, and developer, and only once all gave their approval would the PD enter the backlog for the RPA team and wait until it was time to continue with the RPA flow, according to the business priorities.

As the previous RPA presented, it was not possible to see the Backlog COPS RPA live due to the priorities defined by the business regarding which RPAs they wanted to be developed. However, it was also estimated the savings this RPA would have if it was live. In order to reach this value, it was necessary to ask to the Data Team the volume of cases this RPA would have handled during April and May, following the same logic as in the previous RPA described. With the use of Equation 4.1, and considering 7879 cases and that the RPA would have handled each case in 261.64s, it is possible to estimate it would save approximately 572.6 hours.

4.3 Commercial Routes Creation

The Commercial Routes Creation, as was previously mentioned, is an RPA that is part of a series of three RPAs that intend to integrate new partners into the FARFETCH carrier and shipping configuration process. Every time FARFETCH includes a new partner in its system, it is mandatory to configure the routes carriers perform for the partner in question. All the RPAs from this series are going to be developed but the Commercial Routes Creation RPA was decided to be the first to be developed, despite being the last of this series. This decision was taken by the business since the process this RPA aims to perform had the highest average handling time, which makes it the bottleneck of the process as a whole, as previously mentioned.

The process in which this RPA is included regards three different teams, being Supply Chain the one impacted by the development of this RPA. The fact that the whole process implies the work between different teams justifies the fact that the process as a whole is not 100% automated since, from one RPA to the other, some validations need to be performed by one person of the Supply Chain team. Despite this, the Commercial Routes Creation RPA is 100% automated and aimed to establish, on Sales, new routes, change ones that already exist, or delete routes that are no longer in use according to the data present on a Google Sheet file provided by the business.

Like the RPAs already covered, the Commercial Routes Creation RPA's initial step was conducting a Scope Definition session with the PO. During this session, the process was executed from beginning to end, which made it possible to map the procedure, as it is presented in Figure 4.4.

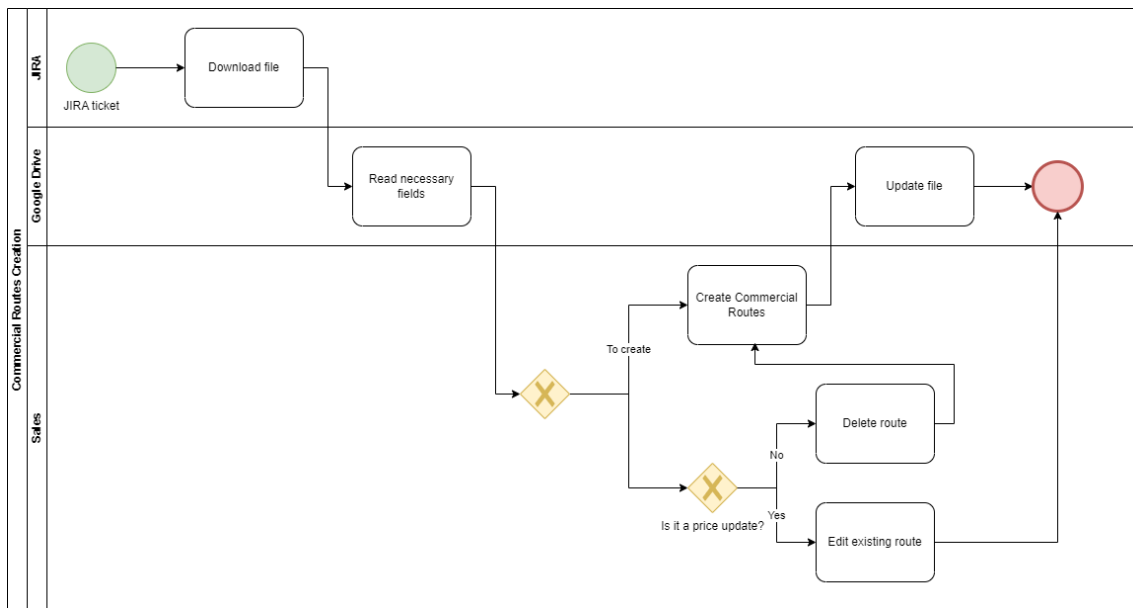


Figure 4.4: Commercial Routes Creation process before RPA implementation

Looking at the Figure above, it is possible to see that a JIRA ticket is the trigger of this RPA. In the ticket's description is the link to the previously mentioned Google Sheet file, which is downloaded by the Supply Chain team. Before continuing with the process, the person performing it would need to know if the route needed to be created or edited because the actions would be different for each case. If it was the case of creating a new route, the person performing the process would use the file to copy and paste the required data into the appropriate fields on Sales (an online platform used for the same function as the STORM platform), finishing the process. However, if it was the case of editing the route, the person would have to check if it was a price update. If it was, it just needed to update the values on Sales; if it was not it first needed to delete the route and then create one with the correct information because if it wasn't a price update it meant that it was an update on one of the fields that typically identify a route - the countries it connects, the kind of service it provides (whether standard or express), and the currency it employs.

Once the as-is map was concluded and the process was well understood, it was possible to create the BC for this RPA. In this document, all of the activities performed were described in detail, such as the fields the JIRA ticket needed to have for the RPA to find it, which field in the Google Sheet file should be copied and where to paste them, as well as which Sales page should be used since this process uses two different pages. When all the information regarding the activities of the RPA was reported in the BC, it was necessary to request the Effort Estimation from the RPA team and the Data Validation from the Data Team. Once both teams delivered the required data, the ROI&SG&A Panning team was asked to perform an ROI analysis, which made it possible to determine that with the implementation of the Commercial Routes Creation RPA, a 4.95 hours/year saving was expected.

Once the BC was completed, it was asked for the PO's approval and after this, it was needed

to determine if this RPA was a "Go" or a "No Go". Following determining it was a "Go", it was possible to follow to the creation of the PD on Confluence.

The development of this PD regarded explaining the path the RPA would follow after finding the ticket. It was necessary to divide the PD into the process's main activities in order to make it easier to understand what the RPA should perform in each one. First, it was necessary to map the fields present on the JIRA ticket and also where the link to the Google Sheet file would be placed. After this, there is an activity that performs some validations to the ticket in order to check if everything is as accorded with the business and also if all the required ticket fields are present. For instance, in this step it is explained what the RPA should do in cases the link is not present in the description. Following this, it was necessary to create an activity in which it was detailed the fields of the Google Sheet needed to be read by the RPA. Next, it was created an activity for the cases it was to create a route and another activity if it was just to edit the route. In both activities it was necessary to thoroughly explain how the person performing this process would proceed: it was detailed how to enter the Sales platform and which tabs needed to be opened in each case, as well as to where the fields read by the RPA on the Google Sheet file would be pasted. Finally, it was created the activities regarding the end of the process for the RPA. In this, it was detailed the procedure of the RPA such as to whom it should assign the case and the message it needed to send.

However, while developing the PD, due to the likelihood that the RPA might not be able to do some validations and the fact that most of the information needed to know what was the action to be made was delivered in a non-standardized way, some problems were brought up. For instance, it was necessary to understand how the RPA would know if the route was to be created or edited. In order to acknowledge this, it was needed to do another meeting with the business but first some changes to present to them were thought.

In order to perform one of the changes, it was essential to know that specific attributes identify a route, including the countries it connects, the kind of service it provides (whether standard or express), and the currency it employs. Since the route is identifiable by the fields mentioned above, it only needs to be altered on Sales if any other field needs to be changed. If any of the fields used to identify a route change, it signifies that the route in question no longer exists and should be removed from Sales. The person carrying out this process would get information about which routes needed to be deleted from Sales in one of two ways: a ticket with a description that included the route's information or by receiving a Slack message. It was not possible to specify how the RPA could identify the route to delete because neither the ticket description nor the Slack message were in a uniform format. Two options were suggested as potential fixes for this problem: either try to standardize the form used to convey information to the Supply Chain team or modify the Google Sheet file that was being used. The business chose to update the file because the first alternative was challenging to implement since the standardization of a message would involve a change in many different teams. The modification involved adding a column to the Google Sheet file specifying the kind of action the RPA ought to take. In order to create a new route, the PO should choose the option "New" in the new column; to edit an existing route, the PO should select the option "Edit" in the column; and to delete a route from Sales, the PO should choose the option

"Delete" in the column.

It was also essential to know that, to create a route, it should be created in the Sales page Shipping Selection Rate, and the same route would automatically be created in the other Sales page used in this process, Portal Flate Rate. However, some routes need only to be edited in Portal Flate Rate, which the person dedicated to this process would know based on their business knowledge. This raised an issue since the RPA does not have the business knowledge needed; it would not know if a route should be edited in Portal Flate Rate after it was created. A solution that was thought for this question was to add another column to the Google Sheet file. This new column would be a checkbox that should be set as TRUE if the route did not need to be edited on Portal Flate Rate and as FALSE for every route that need to be edited on that page.

Another issue that was raised was that, by adding these two new columns to the Google Sheet file, the Supply Chain team would have to insert a new line in the file for each route that needed to be deleted or edited. For example, if a route needed to be edited due to some change in the fields that do not identify the route, the team would have to create a new line to delete the "old" route and another line with the new information. In order to try to make this process more agile, it was thought to add a third column called "Ready for RPA", which would be a check box. This checkbox would be marked as TRUE for every route that should be looked at by the RPA or set as FALSE if it was the case the RPA should ignore that line in the file. With this addition, the business, if they wanted to change something in a route, could make the changes in the line that already existed, mark the action as "edit" and also mark the checkbox "Ready for RPA" as TRUE so that the RPA could edit the route on Sales.

Once these improvements were presented and approved by the business, it was possible to map the procedure again, as shown in Figure 4.5.

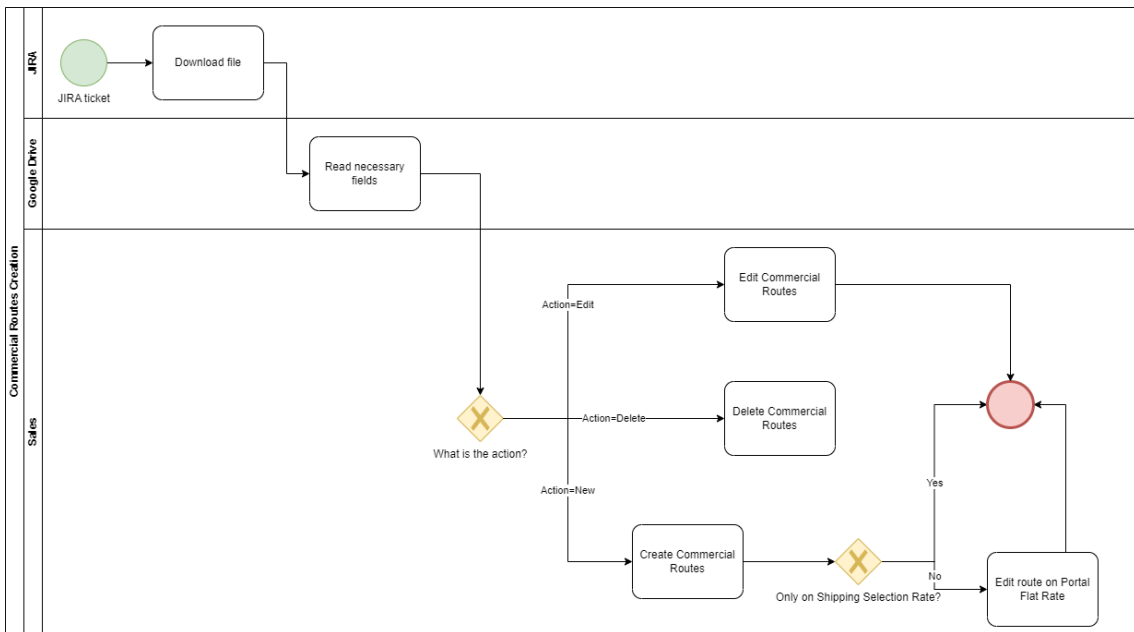


Figure 4.5: Commercial Routes Creation process after RPA implementation

Looking at both Figure 4.4 and 4.5, it is possible to notice some differences. For instance, in the second process flow there are three possible activities depending on what is the "Action" on the Google Sheet File, while in the first process flow, there are just two possible paths. Figure 4.5 also illustrates what should be the RPA response if it is needed to edit on Portal Flate Rate or not.

Besides having a new process flow it was also crucial to create a new version of the BC since new rules needed to be documented. Thanks to this, it was also necessary to request a new Effort Estimation and Data Validation just like for the first version of this BC. Once these inputs were given, the ROI&SG&A Planning team could again perform their study, which demonstrated that the newer version of this RPA would provide the same amount of anticipated savings despite needing more effort from the developer. The final BC can be seen in Figures C.1, C.2 and C.3 from Appendix C.

With these changes, it was needed to ask for the PO's approval again and after having it, it was possible to do the required changes in the PD - presented in Figures C.4, C.5, C.6, C.7, C.8, C.9, C.10, C.11, C.12, C.13, C.14, C.15, C.16 and C.17 from Appendix C. In the new version of the PD there were some main activities that were created and others suffered some changes. For instance, the main activity where the fields of the Google Sheet file that the RPA needed to read were specified suffered some changes since there were new fields that did not exist in the previous BC. Besides, it was also created one main activity for each selection on the "Action" field since the RPA needs to perform different steps for each action.

While the BA developed the PD for this RPA, the PO was asked to complete the Appendix and Test Scenario files so that, after the necessary approvals were received, this RPA could be added to the RPA team's backlog.

Similar to the RPAs previously described, it was also not possible to see this RPA live. According to the values given by the Data Team upon the Data Validation step of the BC, this RPA is expected to handle 393 routes per year and each one of them is supposed to take 45s to be created, deleted or edited. With these estimations, it was possible to do the calculation based on Equation 4.1, which gives an expected saving of 4.9 hours/year if the RPA was live. Once again, it was needed to consider that the RPA was live during April and May to understand if one of the objectives was accomplished and this value is of 0.8 hours.

4.4 RTO Requests v2

The RTO Requests v2 RPA was developed to assist the Delivery Support (DS) team, which is a sub-team of COPS. This RPA aims to automate the Return to Origin (RTO) process, which occurs when the carrier cannot deliver the shipment because the sender or recipient is unavailable or cancels, having to be returned to the shipper. So, in case there is a Salesforce case regarding RTO requests, this RPA seeks to check the order's airwaybill, send the necessary email to the carrier in charge in order for the order to return to the partner, and also perform several steps to create a return on a FARFETCH's platform.

This RPA, as the name suggests, is the second version of an RPA already developed: RTO Requests. The significant difference between them is that the second version works on more scenarios and covers more carriers than the first version, making the second version more complex.

Despite being similar to one already live, the changes required by the DS team for this new RPA implied changes in the path the RPA would follow. Considering this, the team submitted a ticket, making this initiative a part of the DAG Team roadmap, regarding a new automation instead of a change request ticket, where it was specified the necessary changes and additions to the first version.

Once this initiative was chosen for this dissertation project, it was necessary to arrange the Scope Definition session with the PO was arranged, in which the changes and additions to the newer version of the RPA were demonstrated.

After this first meeting, it was possible to map this new version, as it is shown in Figure 4.6:

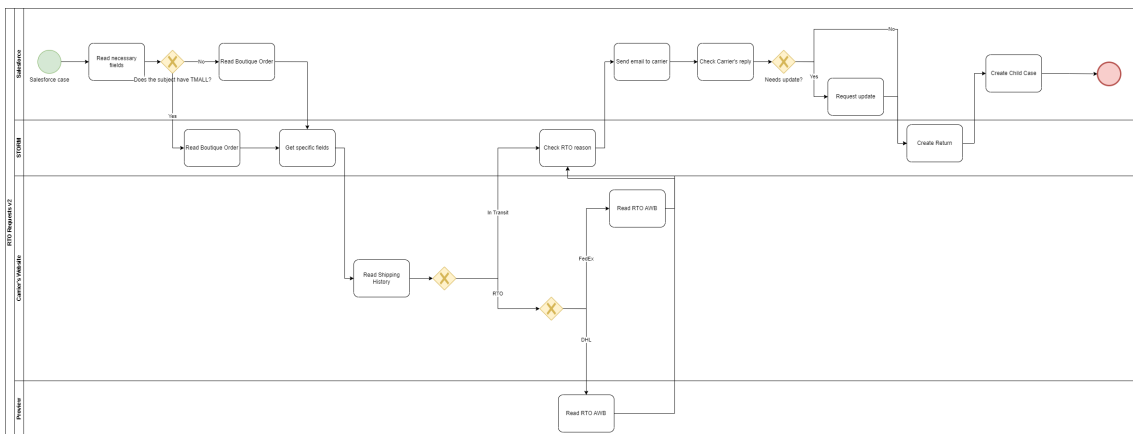


Figure 4.6: RTO Requests v2 process

Once the process was mapped, it was possible to develop the BC of this RPA, which is presented in D.1, D.2, D.3, D.4 and D.5 from Appendix D. In this document, all the activities were thoroughly detailed and the actions the RPA needed to perform for every problem it could encounter. After detailing all the activities, it was essential to require Effort Estimation and Data Validation, similar to what was done for the RPAs previously analysed. Once the RPA and Data teams submitted their analysis for this RPA, a ticket was submitted to the ROI&SG&A Planning team to calculate the expected savings for this RPA. This analysis showed that, with the implementation of this RPA, FARFETCH could expect to save 7803.23 hours/year.

When this team delivered the values that were asked, it was asked the PO's approval of the BC, and once this was given, the PD, Appendix and Test Scenarios files began to be created.

Once again, the PD for this RPA was divided into its main activities, which can be seen in Figures D.6, D.7, D.8, D.9, D.10, D.11, D.12, D.13, D.14, D.15, D.16, D.17, D.18, D.19, D.20, D.21, D.22, D.23, D.24, D.25, D.26, D.27, D.28 and D.29 from Appendix D. The first main activity detailed the fields the Salesforce case would need to have for this RPA to be triggered. After this, the RPA would continue to the second main activity, where some fields from the Salesforce

case were mapped for the RPA to read them so they could be used later in this RPA flow. It was also specified in this main activity the validations the RPA should perform and how to identify duplicated cases. Once this activity is performed, the RPA continues to the third main activity, in which it was detailed the procedure to get the boutique order information. After this, there is the fourth main activity for reading the shipping history on the carrier's website and perform some validations depending on the airway bill movements. Depending on this information, the RPA would continue to the main activity detailing the emails needed to be sent to request an RTO. Once the email was sent, the RPA would follow to the next main activity where it was specified the steps required to perform in order to create a return on STORM. The next main activity regarded creating a child case depending on the type of Salesforce case, specifying what needed to be written on the child case, and finishing the process.

Once the PD and the Appendix and Test Scenarios files were concluded, it was asked for the SME, PO and developer's approval for this initiative, and after it was given, this RPA entered the backlog of the RPA team. This team would start the development of this new version once it was time due to the business priorities previously defined, following the typical RPA flow.

Similar to the other three RPAs described, the RTO Requests v2 was also not possible to go live. In order to calculate the expected savings this RPA would have given to FARFETCH if it was live during April and May it was considered the number of cases the first version of this RPA handled in those months. With Equation 4.1, considering 4367 cases and that the RPA would have taken 476s to handle each case, this RPA would have saved 577.4 hours.

Chapter 5

Reporting

This chapter regards the work performed in order to improve the process of reporting the performance of the already live RPAs. It describes how the process was performed, the to-be of the process and the changes required to make the improvements.

5.1 As-Is Reporting

As previously mentioned, several KPIs can be used to measure RPAs' performance. In order to understand this for the RPAs already live there was developed a report, which allowed to assemble all the information needed and present it in a more visual manner for the stakeholders. This process was performed once a month and was the job of one of the BAs from the DAG Team. In this report, stakeholders would be able to obtain knowledge regarding the savings each RPA brings to FARFETCH in terms of dollars, hours and FTEs, making this reporting a helpful tool for decision-making regarding RPA technology.

The process of updating the report was only made at the end of each month, and it contained information regarding the performance of each RPA for the previous month. The fact that this report was performed monthly makes it a static report since it only showed the RPAs' performance for a determined period of time, being only updated again at the end of the following month. Besides this, another topic of this process was that the data used to create the dashboard needed to be inserted into a platform used by FARFETCH manually. The BA in charge of performing this process needed to copy the required information concerning the RPAs live, which was reported on UiPath Orchestrator, and paste the data on the platform. Once everything was available on the platform, the dashboard would update the charts with the latest information. Despite only being performed once a month, it is possible to conclude that it was a very time-consuming process since the information regarding all the live RPAs needed to be updated, which also makes it a very prone to errors process.

Once the BA finished updating the web platform with the information present on UiPath Orchestrator - total items, failed items, business exceptions, app exceptions and retried items - and the BC such as AHT, Cost saved per Workload and the Expected Workload per year for every

RPA, it was possible to perform the calculations present on Equations 5.1, 5.2 and 5.3. These Equations enable the calculation of some important metrics that allow the evaluation of the RPAs' performance regarding the Savings in dollars, FTEs, and time.

$$\text{Savings [\$]} = \text{Number of Successful Items} \cdot \text{Cost saved per Workload} \quad (5.1)$$

$$\text{Savings [FTEs]} = \frac{\text{Number of Successful Items} \cdot \frac{1000000 \cdot \text{FTE}}{\text{Workload}}}{1000000} \quad (5.2)$$

$$\text{Savings [h]} = \frac{\text{Number of Successful Items} \cdot \text{AHT saved per Workload}}{3600} \quad (5.3)$$

Equation 5.1 delivers the total of dollars an RPA is able to save FARFETCH in that month. As for Equation 5.2, this regards the savings in FTEs generated thanks to the RPA being live. Finally, equation 5.3 considers the total amount, in hours, that was saved to the agents by having that RPA live. It is possible to notice that all these metrics regard the successful items since they did not return to the agent, making them the only cases increasing FARFETCH's savings.

The values mentioned above regarding the type of items handled by the RPA allow the calculation of the percentage of success cases and business and app exceptions, as shown in Equations 5.4, 5.5 and 5.6.

$$\text{Success [\%]} = \frac{\text{Number of Successful Items}}{\text{Total Items}} \cdot 100 \quad (5.4)$$

$$\text{Business Exceptions [\%]} = \frac{\text{Number of Business Exceptions}}{\text{Total Items}} \cdot 100 \quad (5.5)$$

$$\text{App Exceptions [\%]} = \frac{\text{Number of App Exceptions}}{\text{Total Items}} \cdot 100 \quad (5.6)$$

These Equations make it possible to evaluate if a determined RPA is working properly or if something is wrong with its implementation.

Once the calculations mentioned in the 6 previous Equations are completed, the dashboard can be updated with the latest data inserted. By using the generated dashboard, it is possible to gain knowledge concerning the total amount of savings FARFETCH gained per month by using RPA technology and the contribution of each RPA in the total, making it possible to filter the results by time and RPA.

5.2 To-Be Reporting

As was previously mentioned, the reporting process is time-consuming, prone to errors, and only consists of reading data, copying and pasting it, making it a process possible to be automated.

Once this process was assessed, it was noticeable that some improvements could be made and, in order to implement them it was proposed to perform this in three different steps.

As was previously said, this is a very manual process, which was one of the issues that wanted to be tackled. To do this, it would be necessary to migrate all the information present on the web platform used by FARFETCH to Looker Studio - an online application for transforming data into scalable educational dashboards and reports. This platform uses the necessary information BigQuery gets and arranges and presents it in the best possible way. As the first step of improving this process, it was proposed to have the information present on UiPath Orchestrator directly read on BigQuery since this is capable of getting the information present on UiPath Orchestrator via an Application Programming Interface (API). With this improvement, the BA would not have to copy and paste all the information needed from UiPath Orchestrator every month and also the information present on BigQuery is updated daily, which enables the daily update of the dashboards created in Looker, making this a dynamic report. This daily update also enables the stakeholders to have the most recent information regarding the RPA technology, allowing them to make decisions considering the most recent information regarding this technology.

Once this first step was acknowledged, it was necessary to reach out to the Data Team so they could analyse the process of changing the reporting to their scope. It is possible to see in Figure 5.1 the result of performing this first step.

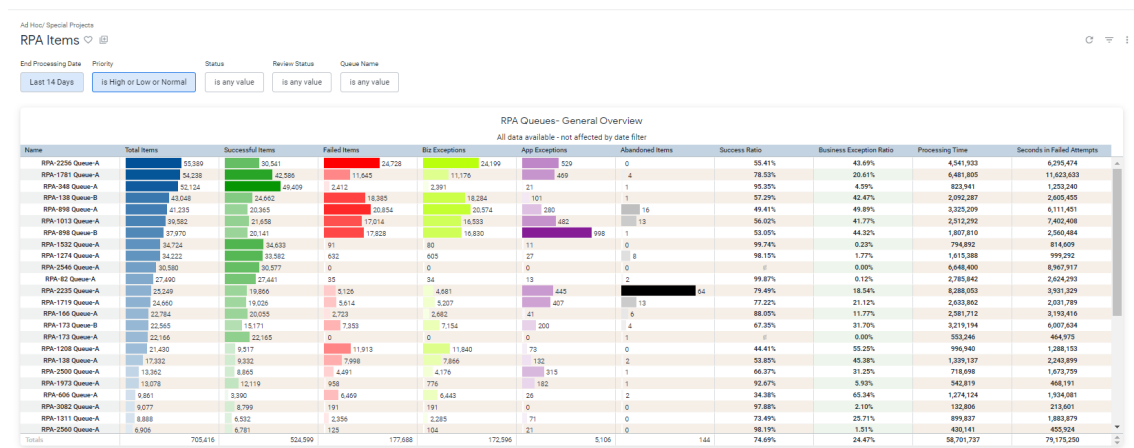


Figure 5.1: Dashboard in Looker

Figure 5.1 makes it possible to notice that the required information was inserted into the dashboard to have it separated by RPA. By looking at the dashboard, it is noticeable that the data regarding the number of total, successful, failed and abandoned items and business and app exceptions are available, so it is possible to perform the calculations of Equations 5.4, 5.5 and 5.6, present in the columns Success Ratio and Business Exception Ratio, just as in the as-is process. It is essential to notice that all these values were previously manually copied by the BA from the UiPath Orchestrator, and for this dashboard, they were automatically retrieved by BigQuery. Moreover, it was asked the Data Team to add two more fields: the Processing Time - which shows the amount of time the RPA takes to be run - and the Seconds in Failed Attempts - which regards the total amount of time the RPA spent trying to rerun itself in the cases something went as not expected. Both these values were not possible to present in the as-is process since they could not

be read by the BA directly from UiPath Orchestrator. Additionally, having this data available in Looker also allows filtering the results according to what fits better the business needs. As such, it was asked to the Data Team to add the following filters: End Processing Date, Priority, Status, Review Status and Queue Name - it is the data structure that contains the tasks/transactions that the RPA has to process or has already processed; an automation process can have several queues, in case it needs to process different tasks.

By looking at Figure 5.1, it is possible to notice that, despite having all the information present on UiPath Orchestrator now available in Looker, this was not sufficient to calculate the metrics from Equations 5.1, 5.2 and 5.3 since to calculate them, it is necessary to have information regarding the amount of savings each RPA is expected to provide to FARFETCH. In order to have this information, in the as-is process, the BA needed to go to the BC of every RPA live and copy and paste that information into the web platform used by FARFETCH. However, it is also possible to migrate this information to Looker, which was suggested as the second step in improving this process. In order to perform this step, it was necessary to gather all the information for every RPA present on its BC into a Google Sheet. By having this file, it would be possible to use the information in it through BigQuery, which would cross the data from the Google Sheet and the UiPath Orchestrator to present the necessary metrics. On top of this, the creation of this Google Sheet would enable the consideration of possible changes in the factors used to calculate the Equations previously mentioned. In the as-is process, if some of that values suffered any change, those changes would be reflected in the months before the change. By implementing this reporting in Looker, it would be possible to have the history of the values. For instance, the values would be stored along with the time they were used, enabling the addition of new values without the previous ones being deleted. In other words, the implementation of this improvement would make it possible to have more accurate data.

Once this step was concluded, it would be possible to have the information needed to present to the stakeholders. In order to present the information in the best possible manner, the Data Team would create a dashboard inspired by the mock-up designed, presented in Figure 5.2.

Automation Insights

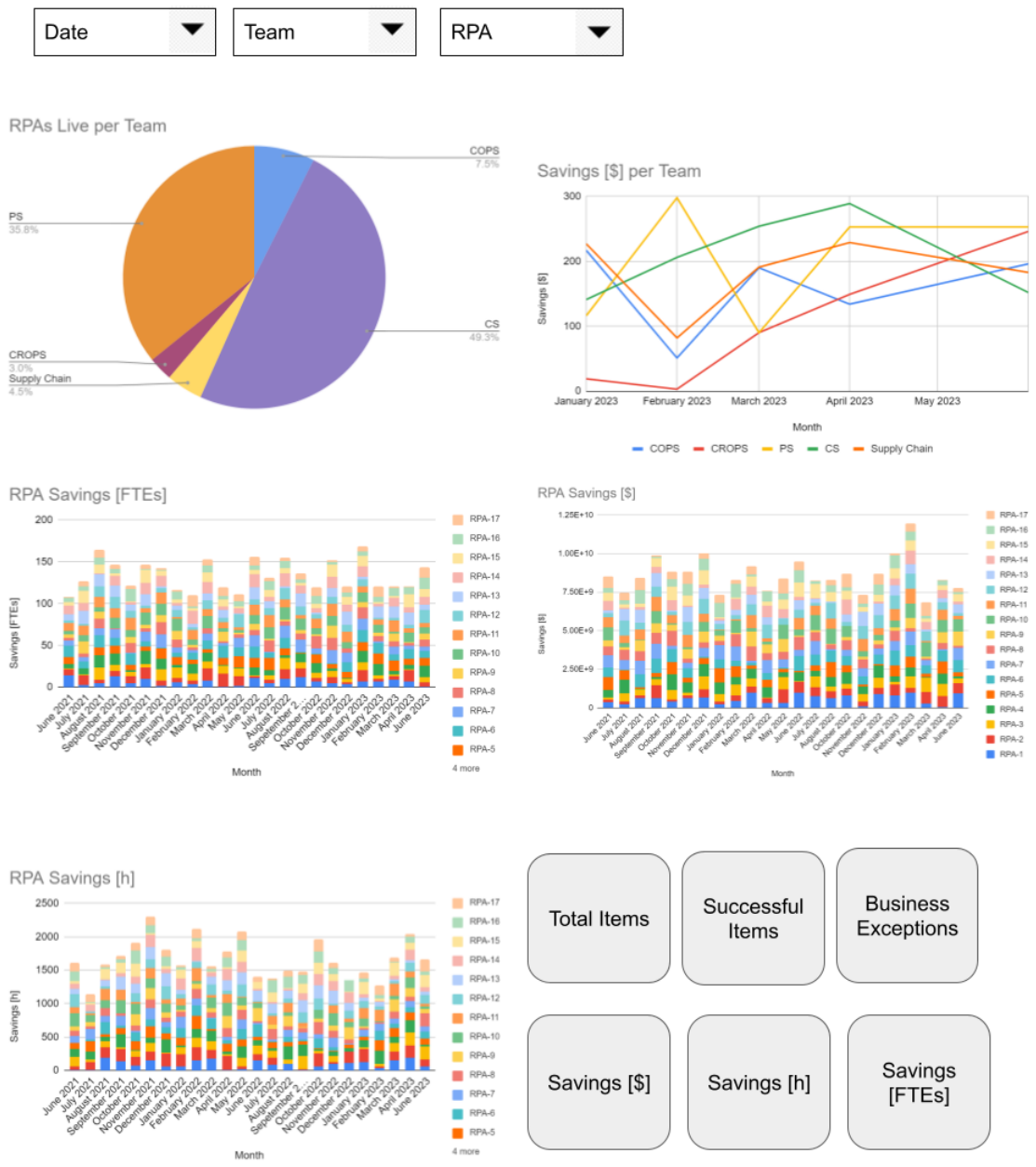


Figure 5.2: Mock-up Dashboard

By looking at Figure 5.2, it is possible to check that the future dashboard was thought to have five different charts and six different boxes. The first chart was designed to show the number of RPAs live per team, and also stored by team, there was thought of a line chart was also developed

that shows the savings each team had over time with the RPAs developed for them. Moreover, there are the three charts present at the bottom of the mock-up which regard the savings per FTEs, hours and dollars over time. These three charts intended to have the information separated by month, and in each month, it showed the savings of each RPA. On top of that, these three charts were thought to have a filter that would allow to show the graphic with the cumulative data. Finally, it was also proposed to have six boxes that would allow to show the total number of items, successful items and business exceptions for all the RPAs and also the total amount of savings from the beginning of the RPA implementation until the day the dashboard was being checked. On top of these, it was also added three filters that would present the data for all the graphics regarding the filters. By using the filter "Date", it is expected to show the data from the range it is chosen; the filter "Team" allows to present all the graphics for the team chosen; finally, it is also possible to sort the information for RPA.

Finally, in the third step of this process improvement, it was suggested a revision on the savings calculation, in order to make it have into consideration the savings of each RPA outcome. This was thought because the different outcomes an RPA can have do not have the same weight on the final savings that RPA manages to generate. In order to create this metric, it would be necessary to document for every RPA live all the outcomes possible it could have as well as the savings each outcome represents in the total savings of the RPA. This change in the savings calculations would allow to have a more accurate value for the savings, and it can be seen the new manner of calculating the savings in Equation 5.7.

$$Savings(\$) = \sum_1^n p_i \cdot N_i \cdot S_i; \quad i = 1, \dots, n \quad (5.7)$$

Equation 5.7, in order to calculate the total saving of an RPA, takes into consideration the weight of each outcome (p), the number of successful items per outcome (N) and the savings each outcome has (S).

This third step was not possible to be implemented in the dashboard during the development of this dissertation since, in order to implement this new formula, it is first needed to document every outcome of each RPA and also to agree with the business the weights each outcome represents in the final savings.

Chapter 6

Conclusions and future work

Digitalisation is becoming an increasing trend, making businesses enhance their digital skills and improve their business processes and customer experiences through digital technologies. One of the possible ways to use digitalisation in businesses can be done through automation, which makes RPA a growing trend in business process restructuring. This type of technology can bring several advantages to businesses that decide to deploy it, which made FARFETCH decide to implement this technology in their processes.

Through a structured approach containing five chapters, this dissertation project aimed to thoroughly examine the non-value added processes used by FARFETCH teams, identify all potential areas for improvement, detail each one, document them and make sure that the company can ultimately prosper. To achieve this, it was delved into the fundamental concepts of digitalization, RPA, and AHP. Moreover, it was assessed the status of RPA implementation at FARFETCH, being described the selection process for choosing the four processes to be developed in this project, which were thoroughly examined afterwards. Finally, it was also described the improvements tackled in the reporting process so that it could be automated and had the latest information regarding this technology at FARFETCH so that the stakeholders could perform the best decisions for the business to thrive.

Once the four processes were chosen according to priorities defined by the business it was necessary to carefully analyse them in order to map the as-is of each one. After this step, it was possible to find improvements to be implemented and document them so they could continue to the RPA Team backlog. All the four processes chosen to be analysed, improved and documented were expected to have an adoption of 100%, meaning that all processes would be performed by the RPA from beginning to end once the RPA was live, without needing the intervention of an employee. With this, it was possible to accomplish the objective "Document processes that have 80% of their activities possible to be automated".

The findings of this project demonstrate the significance of process automation in streamlining operations, enhancing efficiency, and achieving substantial time savings. However, it was not possible to see the RPAs developed going live due to the business priorities of the RPAs they wanted to see live. Despite this, it was made an estimation of the savings each RPA would present

to FARFETCH if they were live in order to check if the objective "Have approximately 500h of savings until the end of the project". In order to do this estimation, it was considered it would take one month to analyse, improve and document the process by the BA and for the RPA to go live, meaning it would have been live for April and May. Taking this into consideration, it was estimated that the LMP vs Geopricing process was expected to save 356.9 hours of employee work during those months; as for the Backlog Manager COPS, this RPA would save 572.6 hours; the Commercial Routes Creation RPA was predicted to save Supply Chain team's employees 0.8 hours; and finally, RTO Requests v2 would save 577.4 hours if it was live during April and May. Having these estimations, it is possible to notice that even if the team could only choose three of the four processes to go live in these two months, this objective would still have been reached.

Moreover, this project also allowed to identify improvements within the team in which this project was developed. In order to improve the way the RPA outcomes were presented to the stakeholders, a three-step strategy was developed to improve the manner this process was performed. That led to the creation of a dashboard in which all the information needed for the business to understand the RPA evolution at FARFETCH would be easily visible.

In conclusion, developing this project dissertation highlighted the transformative potential of business process automation and digital transformation in optimising operations, driving efficiency, and empowering organisations to achieve their strategic goals. The development of RPA technology at FARFETCH showed the importance and need of such technology to a business due to its 24-hour availability, speed of process execution and decrease of human error, allowing for an exponential rise in process productivity.

6.1 Future Work

This dissertation has offered insightful information about FARFETCH's effective adoption of business process automation; however, there is still area for improvement. For instance, future work could include incorporating the AHP approach into the automation team's decision-making procedures.

AHP is a powerful method for making decisions based on several factors, making it extremely useful in identifying and prioritising the operations best suited for automation. The automation team can make wise selections by including AHP in the evaluation framework and basing them on a methodical and unbiased process. AHP makes it possible to compare and weigh multiple criteria and sub-criteria, enabling a more thorough examination of the automatability of diverse processes.

Within the automation team, future efforts should concentrate on identifying the pertinent criteria and sub-criteria for process selection. It will be required for the automation team, business analysts, and stakeholders to work together to set rules for using the AHP technique, establish consistent rating scales, and identify the significant elements driving automation decisions. AHP will make decision-making more transparent, less biased, and allow for more efficient resource allocation for automation projects.

Moreover, another future work that resulted from developing this dissertation project regards the implementation of the new method for calculating the savings each RPA provides to FAR-FETCH. With this in mind, in the future, it will be necessary to map all the possible RPA outcomes with the help of the RPA Team and analyse the percentage each outcome represents in the total savings of the RPA with the help of the business teams. Once this is achieved, updating the formula that gives the total savings will be possible, leading the dashboard to provide more accurate data to the stakeholders.

Bibliography

- Afriliana, N. and Ramadhan, A. (2022). The trends and roles of robotic process automation technology in digital transformation: A literature review. *Journal of System and Management Sciences*, 12:51–73.
- Aguirre, S. and Rodriguez, A. (2017). Automation of a business process using robotic process automation (RPA): A case study. volume 742, pages 65–71. Springer Verlag.
- Alsufyani, N. and Gill, A. Q. (2022). Digitalisation performance assessment: A systematic review. *Technology in Society*, page 101894.
- Bart Teodorczuk (2021). How to Measure RPA Success? A Guide to Robotic Process Automation Metrics. <https://flobotics.io/blog/rpa/rpa-successs-metrics/>. Accessed June 12, 2023.
- BPMN (2022). Bpmn 2.0. Retrieved from <https://bpmn.io>. Accessed April 16, 2023.
- Brennen, J. S. and Kreiss, D. (2016). Digitalization.
- Carmichael, R. M. et al. (2002). Measures of efficiency and effectiveness as indicators of quality—a systems approach. *Journal of Institutional Research Southeast Asia (JIRSEA)*, 1(1):3–14.
- Chacón-Montero, J., Jiménez-Ramírez, A., and Enríquez, J. G. (2019). Towards a method for automated testing in robotic process automation projects. pages 42–47. Institute of Electrical and Electronics Engineers Inc.
- Chakraborty, A., Bhattacharyya, S., De, D., Mahmud, M., and Banerjee, J. S. (2022). Intelligent automation framework using ai and rpa: An introduction. *Confluence of Artificial Intelligence and Robotic Process Automation*.
- Corradini, F., Fornari, F., Polini, A., Re, B., Tiezzi, F., and Vandin, A. (2021). A formal approach for the analysis of bpmn collaboration models. *Journal of Systems and Software*, 180.
- Costa, D. S., Mamede, H. S., and da Silva, M. M. (2023). A method for selecting processes for automation with ahp and topsis. *Heliyon*, 9(3).
- Czvetkó, T., Kummer, A., Ruppert, T., and Abonyi, J. (2022). Data-driven business process management-based development of industry 4.0 solutions. *CIRP Journal of Manufacturing Science and Technology*, 36:117–132.
- Davies, A. (2004). Moving base into high-value integrated solutions: A value stream approach. *Industrial and Corporate Change*, 13:727–756.

- de Moraes, C. H. V., Scolimoski, J., Lambert-Torres, G., Santini, M., Dias, A. L. A., Guerra, F. A., Pedretti, A., and Ramos, M. P. (2022). Robotic process automation and machine learning: a systematic review. *Brazilian Archives of Biology and Technology*, 65.
- Deepu, T. and Ravi, V. (2021). Exploring critical success factors influencing adoption of digital twin and physical internet in electronics industry using grey-dematel approach. *Digital Business*, 1(2):100009.
- Diepveen, B., Matcher, J., and Lewkowicz, B. (2016). Robotic process automation - Automation's next frontier. Published by Ernst & Young. Accessed April 6, 2023.
- Doguc, O. (2019). Robot process automation (rpa) and its future. *Handbook of Research on Strategic Fit and Design in Business Ecosystems*, pages 469–492.
- Enriquez, J. G., Jimenez-Ramirez, A., Dominguez-Mayo, F. J., and Garcia-Garcia, J. A. (2020). Robotic process automation: A scientific and industrial systematic mapping study. *IEEE Access*, 8:39113–39129.
- FARFETCH (2018a). About FARFETCH. <https://aboutfarfetch.com/about/farfetch/>. Accessed April 4, 2023.
- FARFETCH (2018b). About FARFETCH. <https://farfetchgroupcareers.com/farfetch>. Accessed April 4, 2023.
- FARFETCH (2018c). About FARFETCH. <https://aboutfarfetch.com/>. Accessed April 4, 2023.
- Gomes, M. and Seruca, I. (2023). The perception of the management and lower-level employees of the impacts of using robotic process automation: the case of a shared services company. *Procedia Computer Science*, 219:129–138.
- Ishizaka, A. and Labib, A. (2011). Review of the main developments in the analytic hierarchy process. *Expert systems with applications*, 38(11):14336–14345.
- Lacity, M. C. and Willcocks, L. P. (2016). A new approach to automating services article (accepted version) (refereed).
- Martell, F., López, J. M., Sánchez, I. Y., Paredes, C. A., and Pisano, E. (2023). Evaluation of the degree of automation and digitalization using a diagnostic and analysis tool for a methodological implementation of industry 4.0. *Computers & Industrial Engineering*, 177:109097.
- Martín-Peña, M. L., Sánchez-López, J. M., and Díaz-Garrido, E. (2020). Servitization and digitalization in manufacturing: the influence on firm performance. *Journal of Business and Industrial Marketing*, 35:564–574.
- Mohammed, H. J., Kasim, M. M., and Shaharane, I. N. (2018). Evaluation of e-learning approaches using ahp-topsis technique. *Journal of Telecommunication, Electronic and Computer Engineering (JTEC)*, 10(1-10):7–10.
- Moreira, S., Mamede, H. S., and Santos, A. (2023). Process automation using rpa – a literature review. *Procedia Computer Science*, 219:244–254.
- Object Management Group (2010). Business process model and notation (bpmn). Accessed April 16, 2023.

- Patrício, L., Ávila, P., Varela, L., Cruz-Cunha, M. M., Ferreira, L. P., Bastos, J., Castro, H., and Silva, J. (2023). Literature review of decision models for the sustainable implementation of robotic process automation. *Procedia Computer Science*, 219:870–878.
- PUICA, E. (2022). How is it a benefit using robotic process automation in supply chain management? *Journal of Supply Chain and Customer Relationship Management*, pages 1–11.
- Reijers, H. A. (2021). Business process management: The evolution of a discipline. *Computers in Industry*, 126.
- Romão, M., Costa, J., and Costa, C. J. (2019). Robotic process automation: A case study in the banking industry.
- Salvi, A., Vitolla, F., Rubino, M., Giakoumelou, A., and Raimo, N. (2021). Online information on digitalisation processes and its impact on firm value. *Journal of Business Research*, 124:437–444.
- Sklyar, A., Kowalkowski, C., Tronvoll, B., and Sörhammar, D. (2019). Organizing for digital servitization: A service ecosystem perspective. *Journal of Business Research*, 104:450–460.
- Taulli, T. (2020). *The Robotic Process Automation Handbook*. Apress.
- Truant, E., Broccardo, L., and Dana, L.-P. (2021). Digitalisation boosts company performance: an overview of italian listed companies. *Technological Forecasting and Social Change*, 173:121173.
- UiPath (2023a). Robotic Process Automation (RPA) | UiPath. Retrieved from <https://www.uipath.com/rpa/robotic-process-automation>. Accessed April 6, 2023.
- UiPath (2023b). Uipath rpa center of excellence. Retrieved from <https://www.uipath.com/rpa/center-of-excellence>. Accessed April 6, 2023.
- UiPath Academy (2023). Automation Business Analysis Fundamentals - Business Case and Technical Validation. PowerPoint presentation. Accessed April 7, 2023.
- van der Aalst, W. M., Bichler, M., and Heinzl, A. (2018). Robotic process automation. *Business and Information Systems Engineering*, 60:269–272.
- Weber, A. and Thomas, R. (2005). Key performance indicators. *Measuring and Managing the Maintenance Function, Ivara Corporation, Burlington*.

Appendix A

LMP vs Geopricing

Proposal Name	LMP vs Geopricing - Price Discrepancy	
Business Area	Creative Operations	
Director/VP		
SME		
Process Owner		
Project Manager		
Business Analyst		
Developer		
Data Analyst		
ROI Analyst		
E&D Analyst		
Other savings beside time	FALSE	[Optional, if false]
Projected process changes	FALSE	[Optional, if false]
Trigger	Time	
Work auto assigned	TRUE	
SLA	1 day	

	Estimation	Unit	Owner	Ticket ID
Development Effort	7	(days)	Dev	CORPAPPS-3415
Last 12 months volume	21120	(cases)	SME	
% of volume in peak	NA	(% of cases)	SME	
Average handling time	365	(seconds)	SME	NA
% of AHT Reduction	100.00%	(percentage)	SME	NA
Expected adoption	100.00%	(percentage)	SME	NA
Previous version savings		(ftes)	ROI	NA
Expected savings	2141.33	(hours/year)	ROI	WFO-26509
Expected savings		(ftes)	ROI	
Expected savings		(dollars/year)	ROI	
Savings after costs		(dollars/year)	ROI	
Maintenance costs		(dollars/year)	ROI	
Cost per WL		(dollars)	ROI	
ROI		(percentage)	ROI	
EBV		FTE/Volumes in peak/SLA)		

Figure A.1: LMP vs Geopricing Business Case - first part

id	Activity Name	Applications Used	Description	Transitions	Notes
A-1	Delete previous files	Windows	Go the Results folder Delete all the files	Go to next activity	
A-2	Run Big Query	Big Query	Run query for every StoreID in Appendix Export information to a Excel file for every StoreID	Go to next activity	
A-3	Import files on Storm	Storm	Select: -Sites = Farfetch -Partner = STORENAME Upload the file If Status=Error, read the number of errors	If Status=Error and file uploaded, go to Escalate Case If Excel template changes, go to Escalate Case If Status=Failed after three attempts, go to Escalate Case.	-Do this for every file on the folder
A-4	Escalate Case	Slack	Post a message with reason (Store name and number of errors)	End	

Figure A.2: LMP vs Geopricing Business Case - second part

LMP vs Geopricing

3 min read • 17 people viewed

Department	Production Delivery
Business Area	Creative Operations
Process SME	[Redacted]
Process Owner	[Redacted]
Applications Used	BigQuery, Storm, Slack
Proposal ID	[Redacted]
Business Case	[Redacted]
Appendix File	[Redacted]
Test Scenarios	[Redacted]
RPA ID	[Redacted]

Overview

This RPA aims to run everyday a query that retrieves all the discrepancy files and then upload them one by one in STORM.

Figure A.3: LMP vs Geopricing Process Documentation - first part

Process Flow



Main Activities

- Delete Previous Files
- Get Partners to Process
- Gather Information - Pricing
- Import Files on Storm
- Post Slack Message
- Reusable Activities

Delete Previous Files

- Delete previous week files generated that are on Google Drive folder.

Get Partners to Process

- Run Main Query

F Check the Reusable Activities section.


F Each result from the main query represents a combination of partner and tenant for the current day.




i All the remaining activities should be performed for each result of the main query.

Figure A.4: LMP vs Geopricing Process Documentation - second part

Gather Information - Pricing

- Run Auxiliary Query to get the pricing information associated with current StoreId and tenant
- Generate csv file from query results
- Upload created csv to Google Drive folder

 csv name should be "{{storeName}}_{{storeId}}_{{tenant}}_{{currentDate}}.csv"

 If no results were from the Auxiliary Query, raise **Business Exception** with reason 
 (RPA-3862) Failed to obtain pricing information regarding partner {{STORENAME}} and tenant {{tenant}}. 

Import Files on Storm






- Go to Storm
- Go to Pricing
- Go to Price Import
- Set Sites as FARFETCH 
- Set Partner as STORENAME in the tab "partners" on the Appendix file
- Click on Import prices
- Click on Choose file
- Select the file with STORENAME in the file name
- Click on Next
- Read Status
 - If Status is Error, get the number of errors:
 - Read Details
 - If the Status is Failed, try to import the file again 3 times.
 - If the Status is Success, save upload outcome.
- Insert outcome information regarding the import of CSV in BigQuery table.

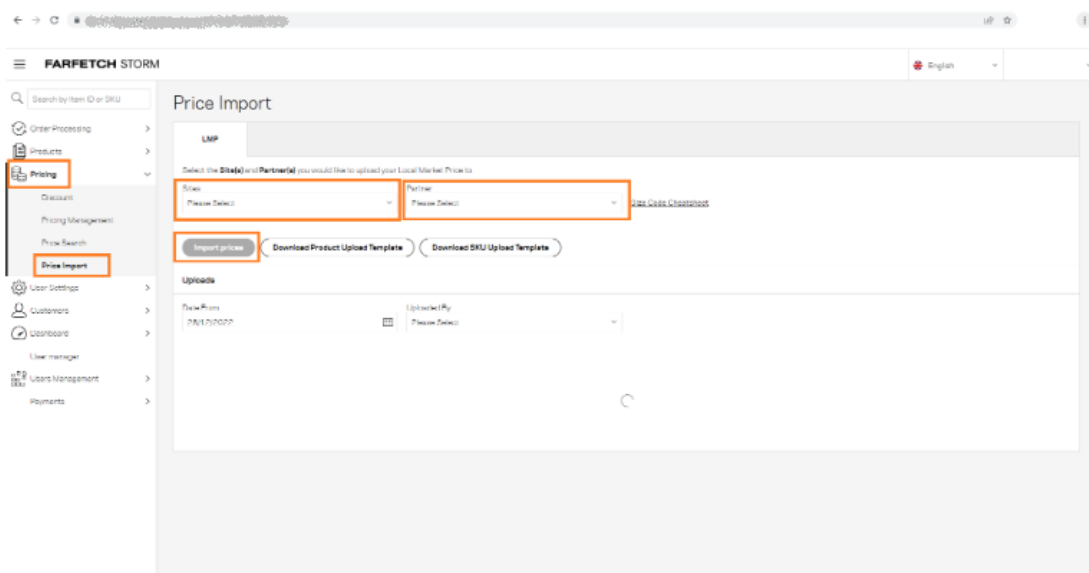
Figure A.5: LMP vs Geopricing Process Documentation - third part

➔ If the Status is **SUCCESS** or **ERROR**, go to **Post Slack Message** with **success code**  RPA-3870: S-1 (RPA-3862) File successfully uploaded. **CLOSED**.

➔ If the Status is **FAILED** after 3 attempts, go to **Post Slack Message** with **return motive**  RPA-3869: RM-1 (RPA-3862) Status is Failed after 3 attempts. **CLOSED**.

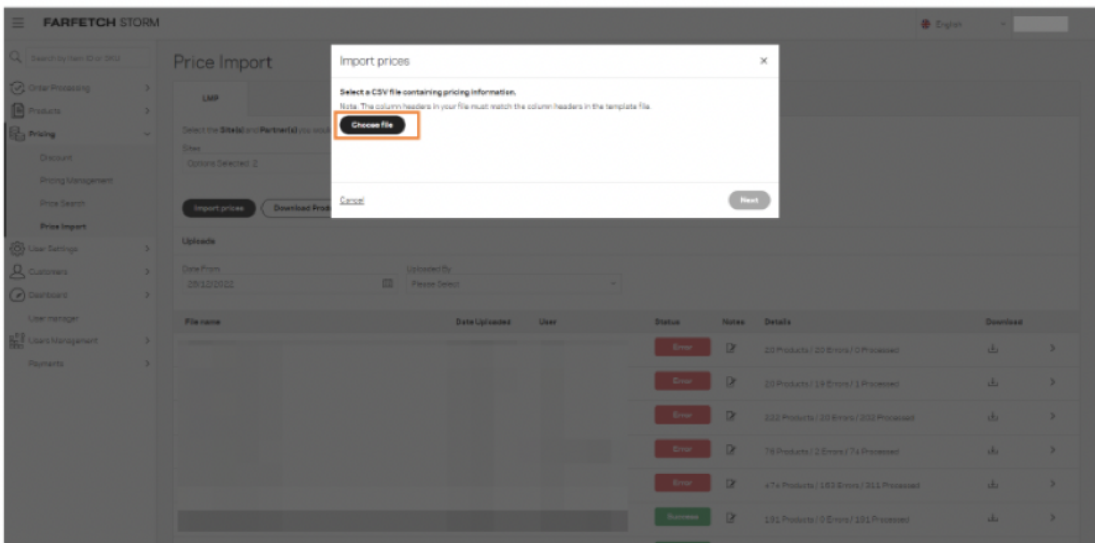
➔ If it is not possible to find the partner on Storm, go to **Post Slack Message** with **return motive**  RP A-3951: RM-2 (RPA-3862) Partner not found on Storm. **CLOSED**.

➔ If it is not possible to import excel, go to **Post Slack Message** with **business exception**  RPA-4123: BE-2 (RPA-3862) Excel is not as expected. **CLOSED**.

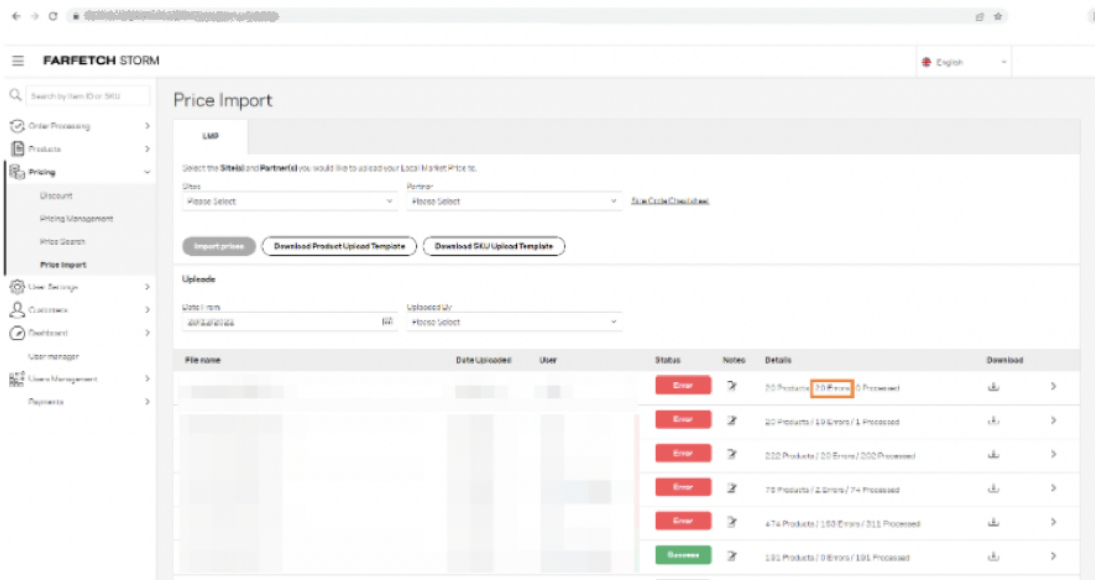


Import files on Storm 1

Figure A.6: LMP vs Geopricing Process Documentation - fourth part



Import files on Storm 2



Read the number of errors

Figure A.7: LMP vs Geopricing Process Documentation - fifth part

Post Slack Message

- Post a message on Slack, according to Appendix file, stating the outcome/error message of each file.
- > Slack message

Reusable Activities

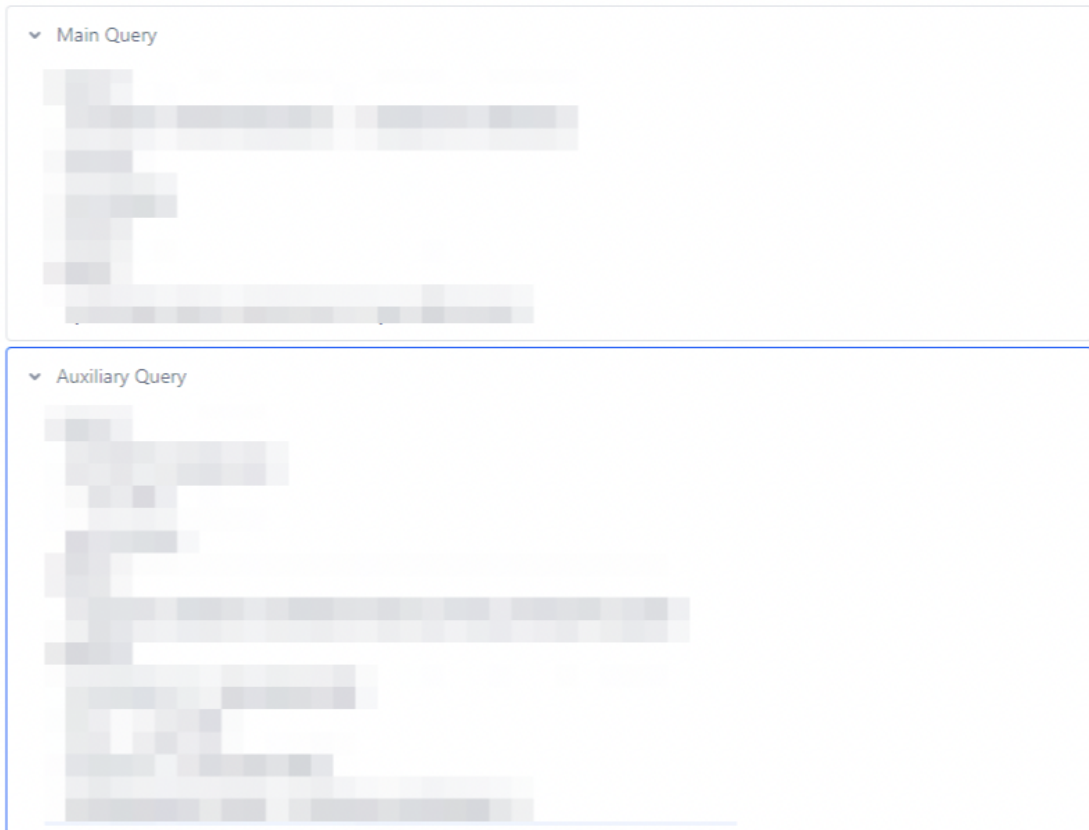


Figure A.8: LMP vs Geopricing Process Documentation - sixth part

Appendix B

Backlog COPS

Proposal Name	Backlog Finder		
Business Area	Customer Operations		
Director			
SME			
Process Owner			
Project Manager			
Business Analyst			
Developer			
Data Analyst			
ROI Analyst			
E&D Analyst			
Other savings beside time	FALSE	[Optional, if false]	
Projected process changes	FALSE	[Optional, if false]	
Trigger	Case		
Work auto assigned	FALSE		
SLA	1 hour		

	Estimation	Unit	Owner	Ticket ID
Development Effort	5	(days)	Dev	CORPAPPS-3071
Last 12 months volume	278114	(cases)	Data	
% of volume in peak	57.25%	(% of cases)	Data	
Average handling time	261.64	(seconds)	Data	WFO-25621
% of AHT Reduction	0%	(percentage)	SME	NA
Expected adoption	35%	(percentage)	SME	NA
Previous version savings		(ftee)	ROI	NA
Expected savings		(hours/year)	ROI	
Expected savings		(ftee)	ROI	
Expected savings		(dollars/year)	ROI	
Savings after costs		(dollars/year)	ROI	
Maintenance costs		(dollars/year)	ROI	
Cost per WL		(dollars)	ROI	
ROI		(percentage)	ROI	
EBV		(FTE/Volumes in peak/SLA)		

Figure B.1: Backlog Finder COPS Business Case - first part

Id	Activity Name	Applications Used	Description	Transitions
A-1	Find Cases	Salesforce	Record Type = Delivery Support Status: Pending (not with SE RPA) or ReOpen (assigned to DS agent) Subject does NOT contain 'ECMS', 'TMALL', 'APAC', 'SLOT(S)' Is Private Client = FALSE Tenant = FARFETCH (10000) No updates on the last 4 days Case Summary is null Category / Subcategory: Delivery / 'Customs Hold' or 'Customer/Partner Contact Needed' or 'Tracking Status' or 'Shipping Issues - Delivery' OR 'Tracking Information' OR 'Failed Delivery - Delivery' Product Received / 'Lost Package' or 'Empty Box' or 'Missing Item' Return / 'Lost Package' or 'Customs Issues' or 'Customs Hold/Taxes' or 'Failed Delivery' or 'Return Not Arrived' or 'Return Status' or 'Initiate Return' OR 'Failed Delivery - Return' or 'Lost Package, Return' Pre-Delivery // 'Address Change' or 'Cancellation Request'	Go to next activity
A-2	Check Case	Salesforce	Get: - Tracking Number - Return/New Tracking Number - Carrier - Read 'Tracking' field if Main Category = Pre-Delivery, Delivery Else, read 'Return/New Tracking Number' field If category Product Received skip this activity - Validate RA/WB (for Return) (confirm if it's not = AWB, if yes continue) - Read shipping History	If Carrier is not DHL, FedEx or UPS, ignore case
A-3	Check Trackings	Carrier Website, Storm		If Status is Delivered (Pre-delivery), send case to RPA Backlog Manager If Status is not Customs Hold / Clearance and category is Delivery / Return, send case to RPA Backlog Manager
A-4	Check Emails	Salesforce	Read Emails and Email date	If, 2 < email sent number > 1 and status is Pending for > 5 consecutive days and outcome is null, send case to RPA Backlog Manager Else if, first email was sent > 15 days and number of email sent > 2 and outcome is null, send case to RPA Backlog Manager
A-5	Send to RPA	Salesforce	Assigne case to RPA Backlog Manager	

Figure B.2: Backlog Finder COPS Business Case - second part

Backlog Finder COPS



Owned by Teresa Ribas

Last updated: Mar 21, 2023 • 3 min read • 10 people viewed

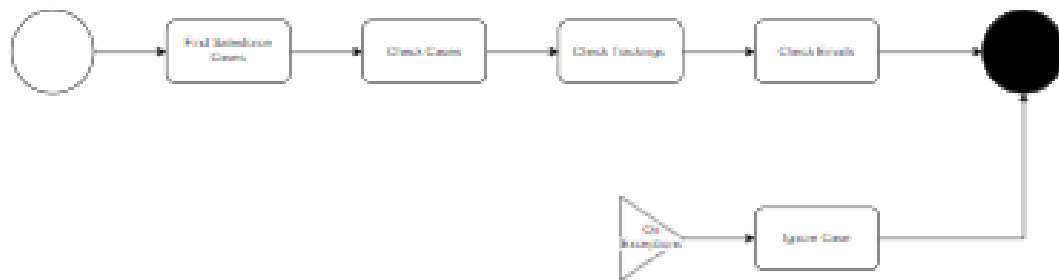
Department	Operations - Service Excellence
Business Area	Customer Operations
Process SME	
Process Owner	
Developer	
Applications Used	Salesforce, Storm, Carriers Website
Proposal ID	3900040717
Business Case	
Appendix File	
Test Scenarios	
RPA ID	

Overview

The aim of this RPA is to find workload for the RPA-3346 (Backlog Manager COPS).

Figure B.3: Backlog Finder COPS Process Documentation - first part

Process Flow



Main Activities

- Find Salesforce Cases
- Check Case
- Check trackings
- Check emails
- Send to RPA

Figure B.4: Backlog Finder COPS Process Documentation - second part part

Find Salesforce Cases

This automation should process all cases that match the followings filters:

- Record Type = Delivery support
 - Status = **Pending** (if Owner != SERPA) or **ReOpen** (if Owner = DS agent)
 - Subject does **not** contain "ECMS", "TMALL", "APAC", "SLOT(S)"
 - Is Private Client = FALSE
 - Tenant = FARFETCH (10000)
 - No updates on the last 4 days (using Last Modified Date < Now - 4 days)
 - Case Summary is null
 - Category / Subcategory:
 - ⊗ Delivery / "Customs Hold"
 - ⊗ Delivery / "Costumer"
 - ⊗ Delivery / "Customer/Partner Contact Needed"
 - ⊗ Delivery / "Tracking Status"
 - ⊗ Delivery / "Shipping Issues - Delivery"
 - ⊗ Delivery / "Tracking Information"
 - ⊗ Delivery / "Failed Delivery - Delivery"
 - ⊗ Product Received / "Lost Package"
 - ⊗ Product Received / "Empty Box"
 - ⊗ Product Received / "Missing Item"
 - ⊗ Return / "Lost Package"
 - ⊗ Return / "Customs Issues"
 - ⊗ Return / "Customs Hold/Taxes"
 - ⊗ Return / "Failed Delivery"
 - ⊗ Return / "Return Not Arrived"
 - ⊗ Return / "Return Status"
 - ⊗ Return / "Initiate Return"
 - ⊗ Return / "Failed Delivery - Return"
 - ⊗ Return / "Lost Package, Return"
 - ⊗ Pre-Delivery / "Address Change"
 - ⊗ Pre-Delivery / "Cancellation Request"

Figure B.5: Backlog Finder COPS Process Documentation - third part

Check Case

- Read fields from Salesforce:
 - Tracking Number
 - Return/New Tracking Number
 - Carrier
 - Email thread
 - Email Date
 - Category
 - Subcategory

➔ If Carrier is **not** DHL or FedEx or UPS, **ignore case** (considered as success with success code RPA-3 471: S-G (RPA-3345) ignore Case CLOSED).

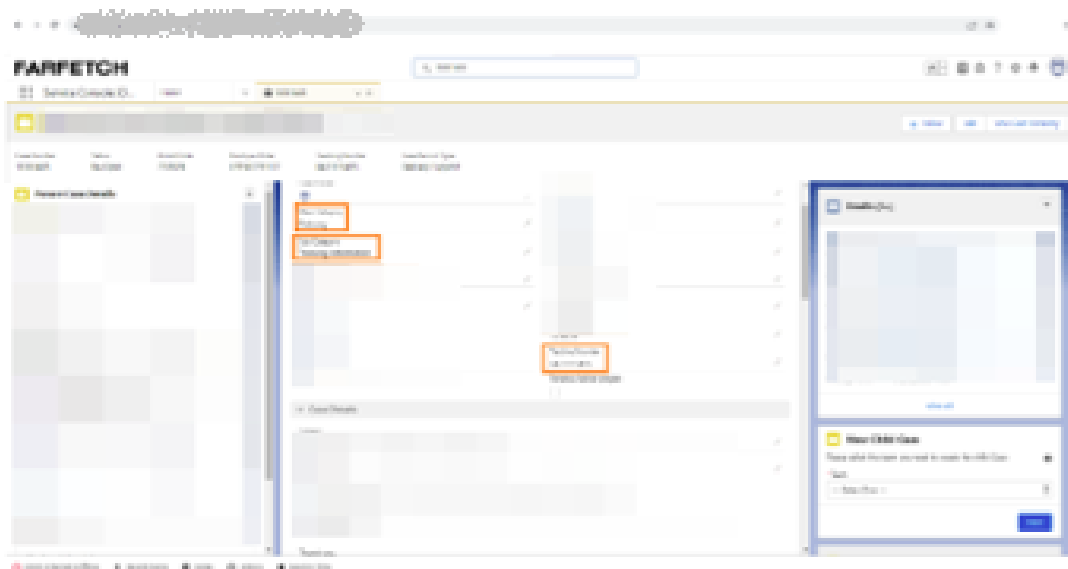


Figure B.6: Backlog Finder COPS Process Documentation - fourth part

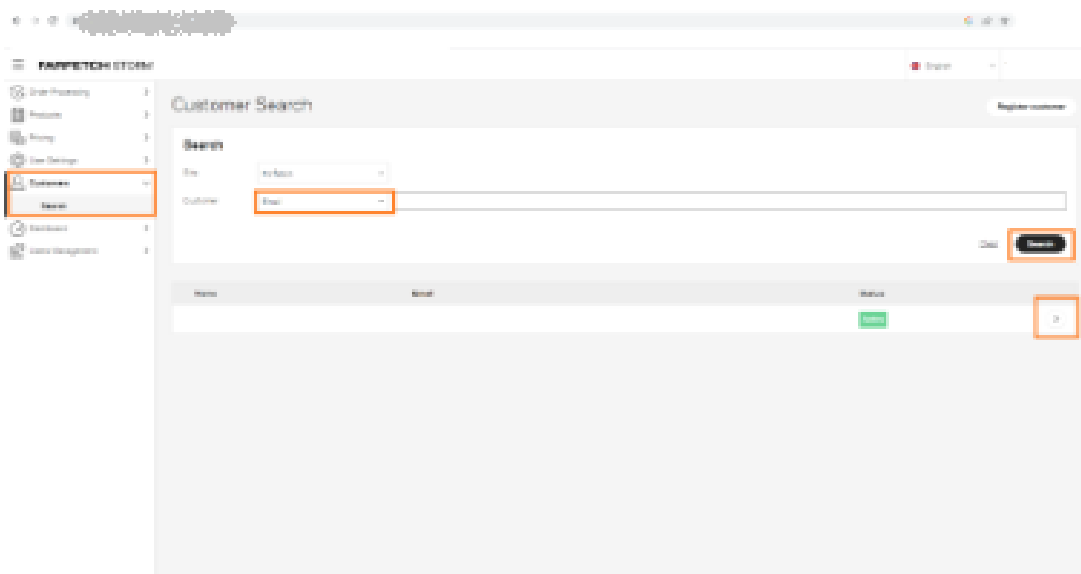
Check trackings

➡ If Category = Product Received, skip this activity.

- If Main Category = Pre-Delivery or Delivery
 - ⊕ Read "Tracking Number"
- Else, read "Return/New Tracking Number" and do the following validations:
 - ⊕ Go to Storm
 - ⊕ Go to Customers Search
 - ⊕ Search by Email
 - ⊕ Get Tracking Code:
 - If Tracking Code != Return/New Tracking Code, continue to the next step
 - Else, ignore case

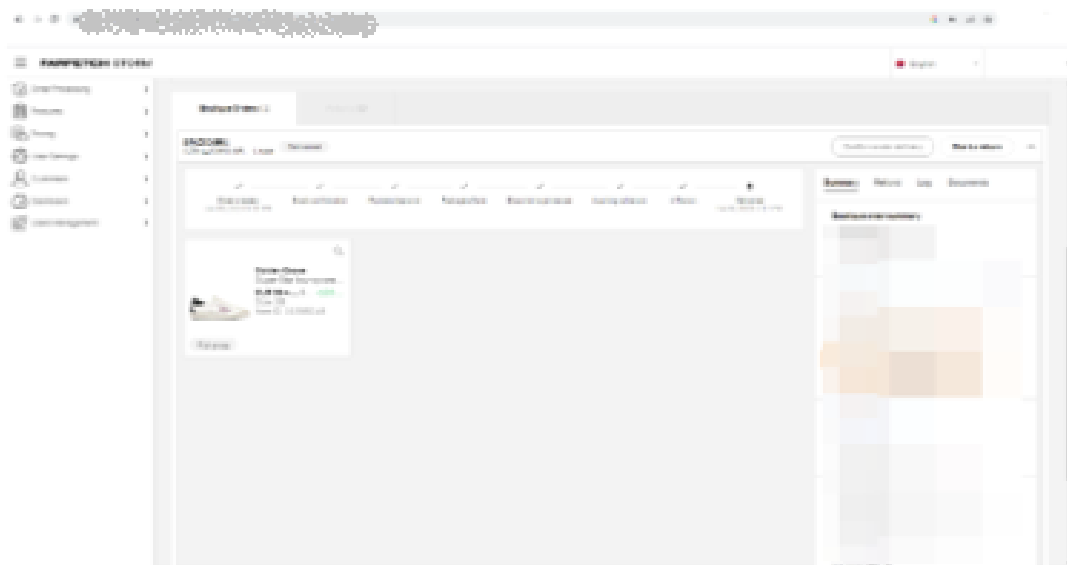
➡ If the case is **ignored**, consider as success with success code [RPA-3471: S-6 \(RPA-3345\) Ignore Case](#) **CLOSED**.

➡ If the required fields are **both** empty, **ignore case** (considered as success with success code [RPA-3471: S-6 \(RPA-3345\) Ignore Case](#) **CLOSED**).



Search Customer in Storm

Figure B.7: Backlog Finder COPS Process Documentation - fifth part



Getting the Tracking Code from Storm

- Read Shipping History on Carrier's website.

Check the Reusable Activities section.

- If Main Category is **Pre-delivery** and Shipping Status is **Delivered**, go to **Send to RPA**. (considered as success with success code `RPA-3362: S-1 (RPA-3345) Shipping status is delivered (category=Pre-delivery)`. Sent to Backlog Manager **CLOSED**)
- If Category / Subcategory is **not Delivery / "Tracking Information"** or **Delivery / "Tracking Status"** and Shipping Status is **not Customs Hold or Clearance**, go to **Send to RPA**. (considered as success with success code `RPA-3363: S-2 (RPA-3345) Shipping status is not Customs Hold (category=Delivery)`. Sent to Backlog Manager **CLOSED**)
- If Category / Subcategory is **not Return / "Lost Package"** or **Return / "Failed Delivery"** or **Return/"Return Not Arrived"** or **Return / "Return Status"** and Shipping Status is **not Customs Hold or Clearance**, go to **Send to RPA**. (considered as success with success code `RPA-3364: S-3 (RPA-3345) Shipping status is not Customs Hold (category=Return)`. Sent to Backlog Manager **CLOSED**)

Figure B.8: Backlog Finder COPS Process Documentation - sixth part

Check emails

- If Category / Subcategory:
 - ⊗ Product Received / "Lost Package"
 - ⊗ Product Received / "Empty Box"
 - ⊗ Product Received / "Missing Item"
 - ⊗ Return / "Lost Package"
 - ⊗ Return / "Customs Issues"
 - ⊗ Return / "Customs Hold/Taxes"
 - ⊗ Return / "Failed Delivery"
 - ⊗ Return / "Return Not Arrived"
 - ⊗ Return / "Return Status"

➔ If the number of **emails** sent is ≤ 2 , Status is **Pending** for more than **5 consecutive days** and the **outcome is null**, go to **Send to RPA** (considered as success with success code [RPA-3366: S-4 \(RPA-3345\)](#) Number emails ≤ 2 , status pending (>5 days) and outcome null. Sent to Backlog Manager CLOSED)

➔ Else if the **first email** was sent **more than 15 days ago**, the number of emails sent is **higher than 2** and the **outcome is null**, go to **Send to RPA** (considered as success with success code [RPA-3367: S-5 \(RPA-3345\)](#) First email >15 days ago, number emails >2 and outcome null. Sent to Backlog Manager CLOSED)

➔ Else, **ignore case** (considered as success with success code [RPA-3471: S-6 \(RPA-3345\)](#) Ignore Case CLOSED).

Send to RPA

- Set:
 - ⊗ Owner = SE.RPA
 - ⊗ Status = Pending

= Handover to Backlog Manager COPS RPA (RPA-3346).

Figure B.9: Backlog Finder COPS Process Documentation - seventh part

Proposal Name	Backlog Manager	
Business Area	Customer Operations	
Director		
SME		
Process Owner		
Project Manager		
Business Analyst		
Developer		
Data Analyst		
ROI Analyst		
E&D Analyst		
Other savings beside time	FALSE	[Optional, if false]
Projected process changes	FALSE	[Optional, if false]
Trigger	Case	
Work auto assigned	FALSE	
SLA	1 hour	

	Estimation	Unit	Owner	Ticket ID
Development Effort	10	(days)	Dev	COP9059-2072
Last 12 months volume	96219	(cases)	Data	
% of volume in peak	40.55%	(% of cases)	Data	
Average handling time	261.84	(seconds)	Data	WFO-28621
% of AHT Reduction	38%	(percentage)	SME	
Expected adoption	100%	(percentage)	SME	NA
Previous version savings		(fles)	ROI	WFO-28123
Expected savings	2687.72	(hours/year)	ROI	
Expected savings		(fles)	ROI	
Expected savings		(dollars/year)	ROI	
Savings after costs		(dollars/year)	ROI	
Maintenance costs		(dollars/year)	ROI	
Cost per WL		(dollars)	ROI	
ROI		(percentage)	ROI	
EBV		(FTE/volumes in peak/SLA)		

Figure B.10: Backlog Manager COPS Business Case - first part

Id	Activity Name	Applications Used	Description	Transitions	Notes
A-1	Find Cases	Salesforce	Cases will be assigned by RPA Backlog Finder	Go to next activity	
A-2	Acknowledge Case	Salesforce	Set - SE RPA - Pending Check Duplicates	If duplicate solve cases with > creation date, go to Solve case (outcome duplicate)	
A-3	Check Trackings	Carrier Website	Read shipping History	If Status is Delivered (Pre-delivery), go to solve case If Status is not Customs Hold / Clearance and category is Delivery>Returns, go to solve case	
A-4	Check Emails	Salesforce	Read Emails received and Email date	If 2 < email sent number > 1 and Status is Pending for more than 5 consecutives days and outcome is null, go to Push Action Else if, first email was sent > 15 days and email sent > 2 and outcome is null, go to Check Escalation	
A-5	Push Action	Salesforce	Send Email to carrier Set - Status = Pending - Owner = Previous agent		one time per case
A-6	Check Escalation	Salesforce	Check if exists an email sent to escalation contact list Post message Set - Status = Pending - Owner = previous agent	If has no email, post message "Escalation required" If has email, post message "Escalation has been already done"	one time per case
A-7	Solve Case	Salesforce	Set - Status = Solved - Owner = previous agent - Case Summary = RPA solved	End	
A-8	Escalate Case	Salesforce	If cannot send email to carrier Else Set - Status = Reopen - Owner = previous queue - Case summary = RPA escalated	End	

Figure B.11: Backlog Manager COPS Business Case - second part

Backlog Manager COPS



Owned by Teresa Ribas

Last updated: Apr 21, 2023 • 4 min read • 9 people viewed

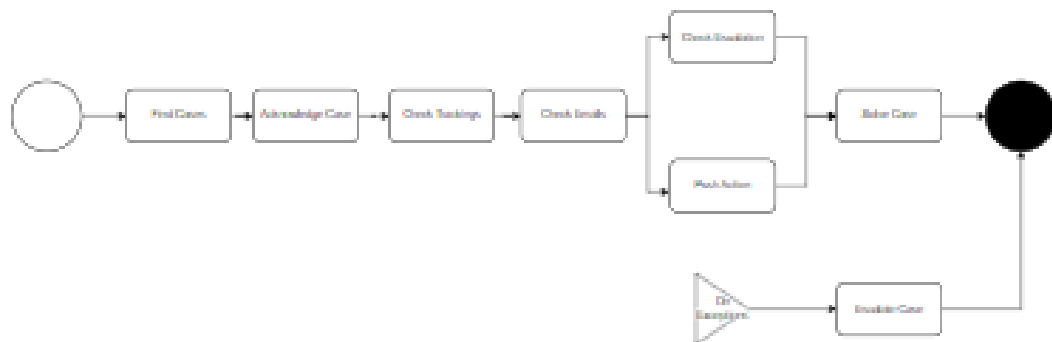
Department	Operations - Service Excellence
Business Area	Customers Operations
Process SME	
Process Owner	
Applications Used	Salesforce, Storm, Carriers Website
Proposal ID	
Business Case	
Appendix File	
Test Scenarios	
RPA ID	

Overview

This RPA aims to find the cases with relevant conditions in agents' backlogs and solve them.

Figure B.12: Backlog Manager COPS Process Documentation - first part

Process Flow



Main Activities

- Find Cases
- Acknowledge Case
- Check Trackings
- Check Emails
- Push Action
- Check Escalation
- Solve Case
- Escalate Case

Find Cases

 Cases were already handover by the RPA Backlog Finder.

 Set:

- Owner = SE.RPA
- Status = Pending

Figure B.13: Backlog Manager COPS Process Documentation - second part

Acknowledge Case [↗](#)

1. Get Fields from Salesforce

Get:

- Owner
- Status
- Tracking Number
- Return/New Tracking Number
- Carrier
- Email thread
- Email Date
- Tenant

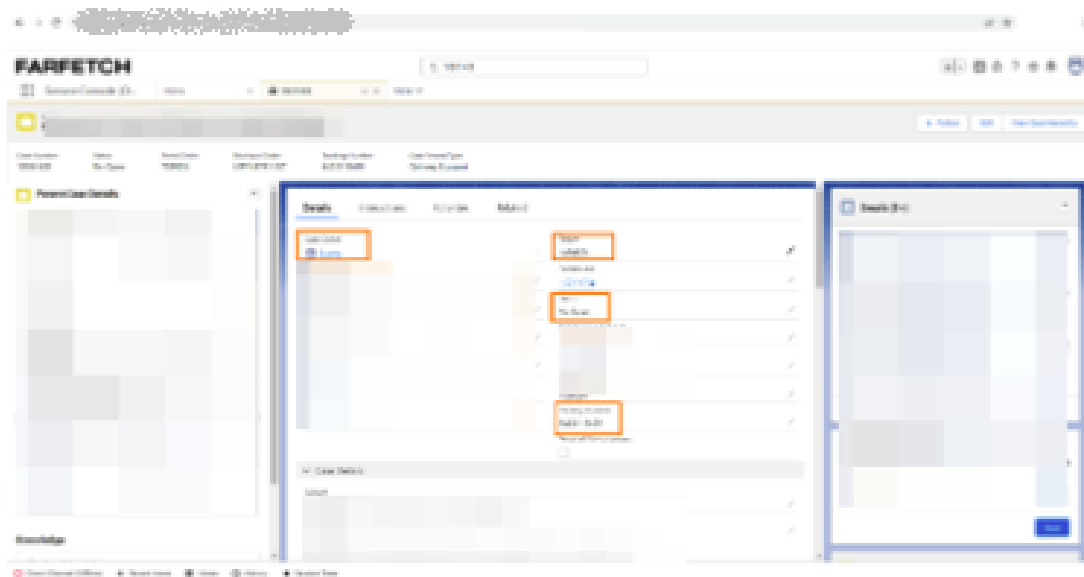


Figure B.14: Backlog Manager COPS Process Documentation - third part

2. Validation Salesforce fields

✘ If Owner is not "SERPA", raise **Business Exception** with reason [RPA-1914: BE-1001 Case not acknowledged. Owner not expected](#) **CLOSED** .

✘ If Status is not "Pending", raise **Business Exception** with reason [RPA-1915: BE-1002 Case not acknowledged. Status is not Pending](#) **CLOSED** .

✘ If **Email thread** or **Email Date** is empty, raise **Business Exception** with the reason [RPA-1916: BE-1004 Case not acknowledged. Required field <{{field_name}}> is empty](#) **CLOSED** .

✘ If Carrier is **not** DHL, FedEx or UPS, raise **Business Exception** with reason [RPA-3430: BE-1 \(RPA-3346\) Carrier is not expected](#) **CLOSED** .

✘ If Tenant != FARFETCH, raise **Business Exception** with reason [RPA-3433: BE-2 \(RPA-3346\) Tenant is not expected.](#) **CLOSED** .

3. Find Duplicates

Use Salesforce Global Search to find all duplicate cases:

- Same Tracking Number or Return/New Tracking Number
- Status != New or Closed
- Record Type = DS

✔ If a duplicate exists, go to **Solve case** with the success code [RPA-3431: S-1 \(RPA-3346\) Duplicate](#) **CLOSED** .

Figure B.15: Backlog Manager COPS Process Documentation - fourth part

4. Find Delivery Country

- Go to Storm SCV -
- Go to Customers Search
- Set Site as FARFETCH
- Search by Tracking Number
- Read Country from Delivering to

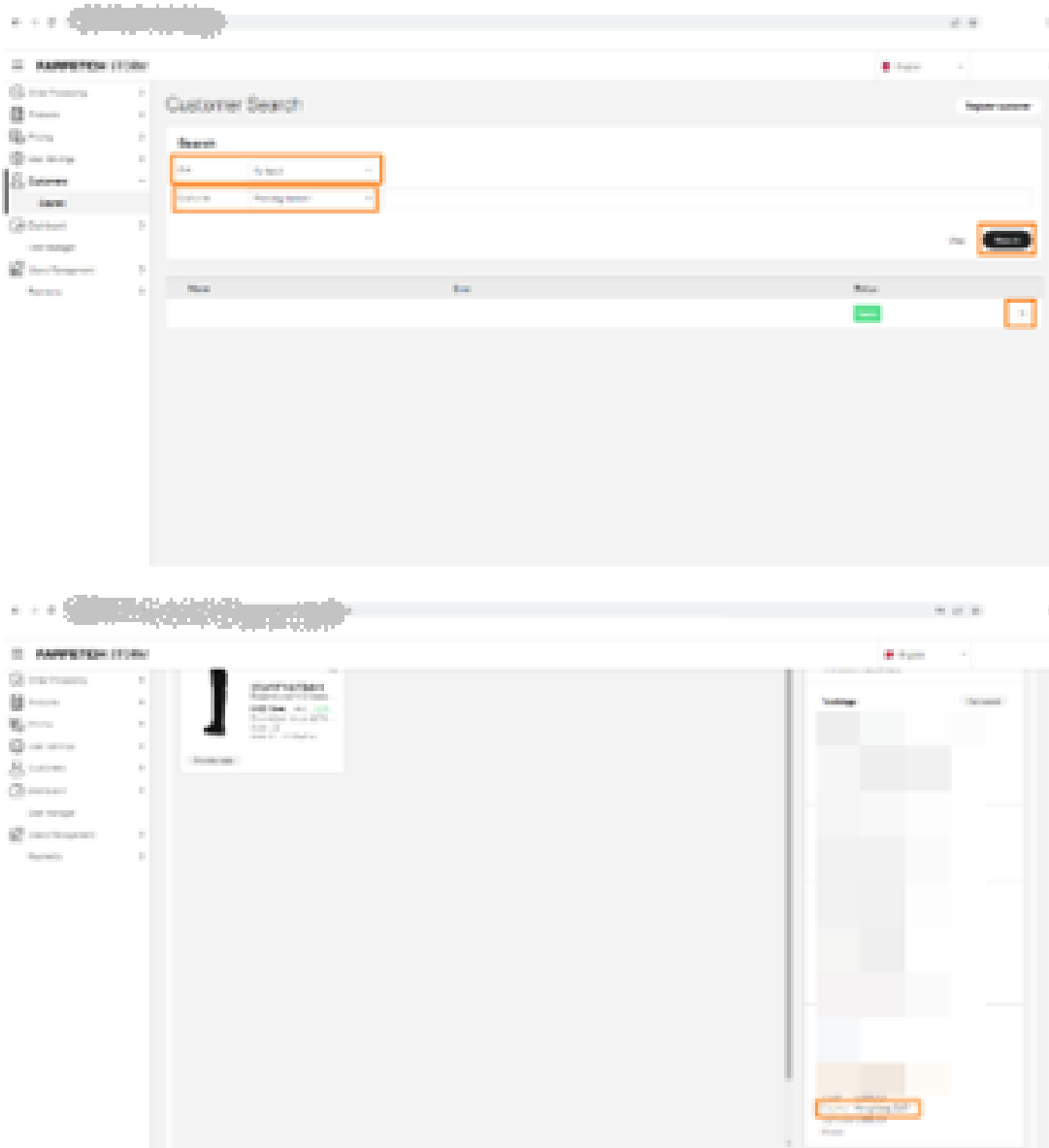


Figure B.16: Backlog Manager COPS Process Documentation - fifth part

Check Trackings

- If Main Category = Pre-Delivery or Delivery
 - ⊗ Read "Tracking Number"
- Else, read "Return/New Tracking Number" and do the following validations:
 - ⊗ Go to Storm
 - ⊗ Go to Customers Search
 - ⊗ Search by Email
 - ⊗ Get Tracking Code:
 - If Tracking Code != Return/New Tracking Code, continue to the next step
 - Else, ignore case

⊗ If both of these fields are empty, raise **Business Exception**, with reason [RPA-3436: BE-3 \(RPA-3346\)](#)
Tracking Number is empty. **closed** .

- Read Shipping History on Carrier's Website

☰ Check the Reusable Activities section.

✔ If Main Category is **Pre-delivery** and Status is **delivered** , go to **Solve Case** with success code [RPA-3434: S-2 \(RPA-3346\) Package is delivered](#) **closed** .

✔ If Main Category is **Delivery or Returns** and Status is **not onhold** , go to **Solve Case** with success code [RPA-3435: S-3 \(RPA-3346\) Package in transit](#) **closed** .

Figure B.17: Backlog Manager COPS Process Documentation - sixth part

Check Emails

➤ If the number of **emails** sent is **< = 2**, Status is **Pending** for more than **5 consecutive days** and the **outcome is null**, go to Push Action.

➤ Else if the **first** email was sent **more than 15 days** ago, the number of emails sent is **higher than 2** and the **outcome is null**, go to Check Escalation.

Figure B.18: Backlog Manager COPS Process Documentation - seventh part

Push Action

1. Send Email to Carrier

 Use Salesforce to send the email, do this one time per case.

1.1 If the Carrier is DHL:

- Change contact to 
- Send the email according to **Appendix**.

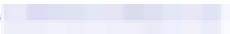

 If cannot send email to carrier, raise **Business Exception** with reason  RPA-3437: BE-4 (RPA-334G) N or possible to send email to carrier. 




1.2 If the Carrier is FedEx:

- Change contact to 
- Send the email according to **Appendix**.

 If cannot send email to carrier, raise **Business Exception** with reason  RPA-3437: BE-4 (RPA-334G) N or possible to send email to carrier. 

1.3 If the Carrier is UPS:

- If Country is "United States"
 - Change contact to 
 - Send the email according to **Appendix**.
- Else,
 - Change contact to 
 - Send the email according to **Appendix**.

 If cannot send email to carrier, raise **Business Exception** with reason  RPA-3437: BE-4 (RPA-334G) N or possible to send email to carrier. 

2. Set:

- Status = Pending
- Owner = Previous agent

Figure B.19: Backlog Manager COPS Process Documentation - eighth part

Check Escalation

Do this activity one time per case.

- If it exists an email sent to escalation contact list (check Appendix Tab escalation_contact):
 - ⊗ Post a message: "Escalation has already been done".
 - ⊗ Set:
 - Status = Pending
 - Owner = Previous Agent

⊗ If it does not exist an email sent, raise **Business Exception** with reason [RPA-4026: BE-S \(RPA-3346\)](#)
Escalation Required. [CLOSED](#) .

Solve Case

Set:

- Status = Solved
- Owner = Previous Agent
- Case Summary = RPA.solved

Escalate Case

- Post a message with the escalation reason on the main case (DS)
- Set:
 - ⊗ Status = Reopen
 - ⊗ Owner = Previous queue
 - ⊗ Case summary = RPA.escalated

Figure B.20: Backlog Manager COPS Process Documentation - ninth part

Appendix C

Commercial Routes Creation

Proposal Name	Carriers and Shipping Configurations	
Business Area	Delivery - Supply Chain	
Director		
SME		
Process Owner		
Project Manager		
Business Analyst		
Developer		
Data Analyst		
ROI Analyst		
E&D Analyst		
Other savings beside time	FALSE	[Optional, if false]
Projected process changes	FALSE	[Optional, if false]
Trigger	File	
Work auto assigned	FALSE	
SLA	1 day	

	Estimation	Unit	Owner	Ticket ID
Development Effort	20	(days)	Dev	NA
Last 12 months volume	393	(cases)	Data/SME	NA
% of volume in peak	NA	(% of cases)	Data/SME	
Average handling time	45	(seconds)	Data/SME	
% of AHT Reduction	100.00%	(percentage)	SME	NA
Expected adoption	100.00%	(percentage)	SME	NA
Previous version savings		(ftes)	ROI	NA
Expected savings	4.95	(hours/year)	ROI	WFO-24903
Expected savings		(ftes)	ROI	
Expected savings		(dollars/year)	ROI	
Savings after costs		(dollars/year)	ROI	
Maintenance costs		(dollars/year)	ROI	
Cost per WL		(dollars)	ROI	
ROI		(percentage)	ROI	
EBV		(FTE/Volumes in peak/SLA)		

Figure C.1: Commercial Routes Creation Business Case - first part

Id	Activity Name	Applications Used	Description	Transitions	Notes
A-1	Find Workload	JIRA	Filters: -Project: PRM -Status: Selected for Development -Assignee: SE RPA -Type: Task	Go to next activity	
A-2.1	Acknowledge Ticket	JIRA	Set: -Status: In Progress -Assignee: SE RPA Jira ticked fields and link validations: -Summary must be "Carriers and Shipping Configurations [Tenant]" -Solution must be "Setup Request" -Partner List must contain one tenant selected -Phase must be one of: "Partner Onboarding" (if new) or "Partner Post-live" (for updates) -Must contain one link: -Link Shipping Configurations file - {{partner_name}} Shipping Configurations {{date}} Validate group user	If all is ok, go to next activity, Else, go to Escalate Case	The columns that identify a route are: Origin Country Name, Destiny Country Name, Service, Currency, Store
A-2.2	Acknowledge Ticket	Google Drive	Remove edit permissions file expect for the RPA Check if RPA and Process Owner are the only users that can edit the file at this point in time	Go to next activity	Dedicated shared folder required just for these files. At folder level only RPA and Process Owner user can have edit access. Everyone can have file level edit access that will be removed during RPA processing.
A-3	Process Files	Google Drive	Read Shipping Configurations file - Required Tabs: Tab 4 - [PlatCos+CosDe] 4. Shipping Prices (Origin Country Name, Destiny Country Name, Service, Currency, Store, Shipping Value, Threshold, ThresholdPrice, Enable HAZMAT, HAZMAT Cost, Action, Shipping Selection Only, Ready 4 RPA) - Ignore rows with Ready 4 RPA as FALSE	If Business Exception, go to Escalate Case Else, If Action=New and Ready 4 RPA=TRUE, go to A-4.1 Else, If Action=Edit and Ready 4 RPA=TRUE, go to A-4.2 Else, If Action=Delete and Ready 4 RPA=TRUE, go to A-4.3	Only select Action=Edit if it's to edit the columns Shipping Value, Threshold, ThresholdPrice, Enable HAZMAT and HAZMAT Cost. If it is necessary to edit the rest of the columns select Action=Delete and add a new line to the Shipping Configuration File.

Figure C.2: Commercial Routes Creation Business Case - second part

A-4.1	Create Commercial Routes	Sales	Open Sales Go to Shipping Go to Shipping Selection Rate Choose Tenant Click on add new record Insert Info from Google Sheet	If Shipping Selection Only=FALSE, go to A-4.1 Else: If Shipping Selection Only=TRUE, go to Solve case If Business Exception, go to Escalate Case	
A-4.1.1	Edit Portal Plate Rate	Sales	Go to Portal Flat Rate Choose Tenant Find the route created and the route with the same Origin, Destination, StoreName, Service, Currency Calculate ThresholdPrice for ServiceType=Express: ThresholdPrice=ThresholdPrice(Express)-ThresholdPrice(Standard)	Success go to Solve case If Business Exception, go to Escalate Case	
A-4.2	Edit Commercial Routes	Sales	Edit existing route on Shipping Selection and on Portal Flat Rate	Success go to Solve case If Business Exception, go to Escalate Case	
A-4.3	Delete Commercial Rout Sales		Delete route on Shipping Selection and then on Portal Flat Rate	Success go to Solve case If Business Exception, go to Escalate Case	
A-5	Solve Case	JIRA	Set: - Status: Closed - Resolution: Done - Owner: Reporter (Reattribute permissions to edit file for everyone that had edit access)	End	
A-6	Escalate Case	JIRA	Post message with business exception Set: - Owner: Super Agent - Status: In Refinement (Reattribute permissions to edit file for everyone that had edit access)	End	

Figure C.3: Commercial Routes Creation Business Case - third part

Commercial Routes Creation

5 min read • 24 people viewed

Department	Operations - Supply Chain
Business Area	Delivery
Process SME	
Process Owner	
Applications Used	JIRA, Google Drive, Google Sheets, Sales
Proposal ID	
Business Case	
Appendix File	
Test Scenarios	
RPA ID	

Overview

This automations aims to create the commercial routes process that occurs during the carrier and shipping configuration process.

Figure C.4: Commercial Routes Creation Process Documentation - first part

Process Flow



Main Activities

- Find Jira ticket
- Acknowledge Ticket
- Process Files
- Create Commercial Routes
- Edit Commercial Routes
- Delete Commercial Routes
- Solve Case
- Escalate Case

Figure C.5: Commercial Routes Creation Process Documentation - second part

Find Jira ticket

This automation should process all tickets that match the following filters:

- Project = PRM
- Status = Selected for Development
- Assignee = SE.RPA
- Type = Task

⚠ Finally set:

- Assignee = SE.RPA
- Status = In Progress

Figure C.6: Commercial Routes Creation Process Documentation - third part

Acknowledge Ticket

1. Group user validation

❌ If Previous Assignee does not exist in "group_user" tab in Appendix File, raise **Business Exception** with reason **closed** .

2. Get Jira Ticket fields

- Summary
- Tenant (read from Summary)
- Solution
- Partners List
- Phase
- Description (get Link File)

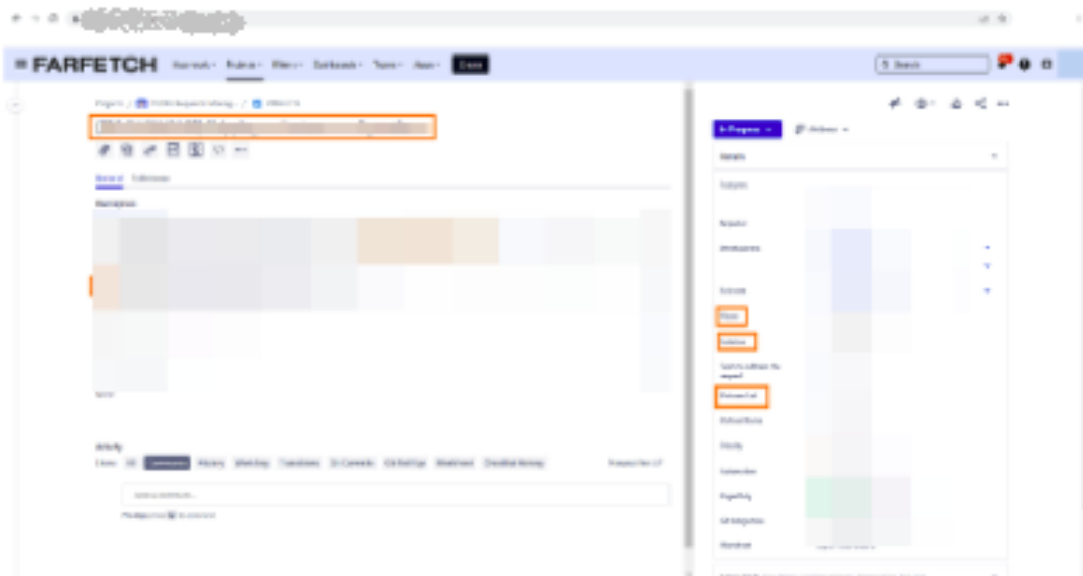


Figure C.7: Commercial Routes Creation Process Documentation - fourth part

3. Validations on Jira fields

- ✘ If Assignee is not "SE.RPA", raise **Business Exception** with reason [RPA-4051: BE-2 \(RPA-3342\) Assignee not expected.](#) **CLOSED** .
- ✘ If Status is not "In Progress", raise **Business Exception** with reason [RPA-4052: BE-3 \(RPA-3342\) Status is not In Progress.](#) **CLOSED** .
- ✘ If Summary is not "Carriers and Shipping Configurations [Tenant]", raise **Business Exception** with reason [RPA-4053: BE-4 \(RPA-3342\) Summary not expected.](#) **CLOSED** .
- ✘ If Solution is not "Setup Request", raise **Business Exception** with the reason [RPA-4054: BE-5 \(RPA-3342\) Solution not expected.](#) **CLOSED** .
- ✘ If Partners List is empty, raise **Business Exception** with reason [RPA-4055: BE-6 \(RPA-3342\) Partners List is empty.](#) **CLOSED** .
- ✘ If Phase is not "Partner Onboarding" or "Partner Post-live", raise **Business Exception** with reason [RPA-4056: BE-7 \(RPA-3342\) Phase not expected.](#) **CLOSED** .
- ✘ If Description does not contain a link to Shipping configurations file, raise **Business Exception** with reason [RPA-4057: BE-8 \(RPA-3342\) Missing Shipping Configuration File link.](#) **CLOSED** .
- ✘ If the file can't be opened, raise **Business Exception** with reason [RPA-4088: BE-9 \(RPA-3342\) Can't open the file.](#) **CLOSED** .

Figure C.8: Commercial Routes Creation Process Documentation - fifth part

4. Edit file share options [🔗](#)

- Remove edit permissions file expect for the RPA
 - ⊕ Click "Share"
 - ⊕ Give Viewer access to all existing users except Process Owner and RPA user
- Check if RPA user and Process Owner are the only users that can edit the file at this point in time.

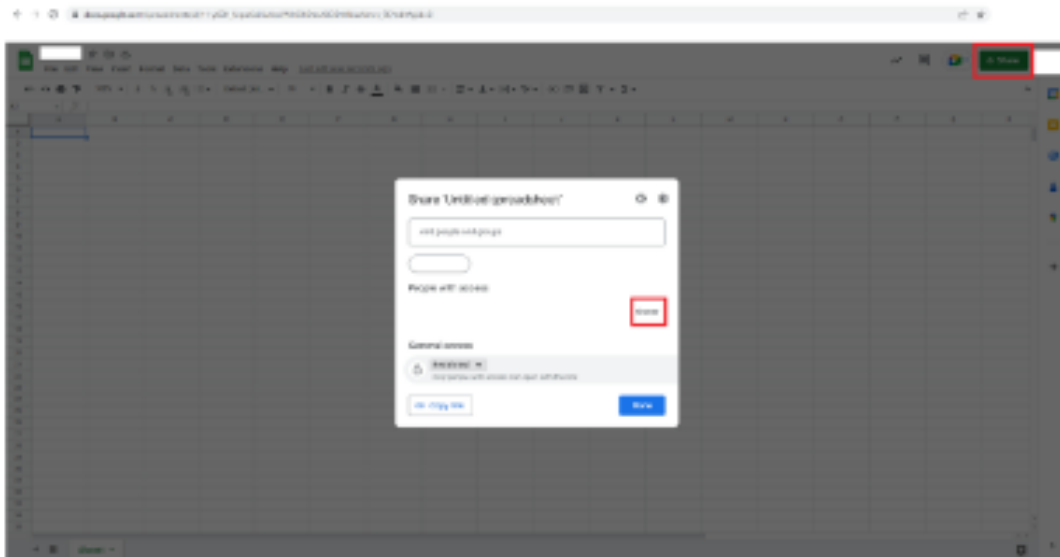


Figure C.9: Commercial Routes Creation Process Documentation - sixth part

Process Files

Read required information from [PlatOps+OpsDel] 4. Shipping Prices:

- Origin Country Name
- Destiny Country Name
- Service
- Currency
- Store
- Shipping Value
- Threshold
- ThresholdPrice
- Enable HAZMAT
- HAZMAT Cost
- Action
- Shipping Selection Only
- Ready 4 RPA

➔ If the column **Action** is set as **NEW** and the column **Ready 4 RPA** is **TRUE**, go to **Create Commercial Routes**

➔ If the column **Action** is set as **EDIT** and the column **Ready 4 RPA** is **TRUE**, go to **Edit Commercial Routes**

➔ If the column **Action** is set as **DELETE** and the column **Ready 4 RPA** is **TRUE**, go to **Delete Commercial Routes**

⊖ If the column **Ready 4 RPA** is **FALSE**, ignore case.

✖ If any of the required information, apart from the **Store** column, is missing, raise **Business Exception** with reason RPA-4089: BE-10 (RPA-3342) Missing required information - {(column_name)} CLOSED.

✖ If file template has changed, raise **Business Exception** with reason RPA-4090: BE-11 (RPA-3342) File template changed. CLOSED.

✖ If any tab name in the file template has changed, raise **Business Exception** with reason RPA-4091: BE-12 (RPA-3342) Tab name has changed. CLOSED.

Figure C.10: Commercial Routes Creation Process Documentation - seventh part

Create Commercial Routes

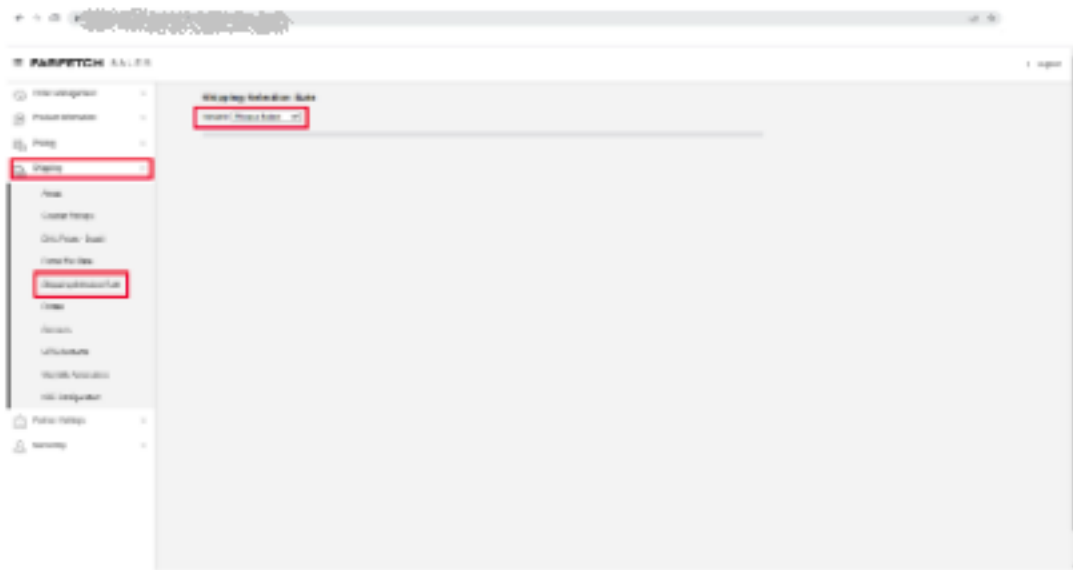
- Open Sales
- Go to "Shipping"
- Go to "Shipping Selection Rate"
- Select "Tenant"
- Click on "Add new record"
- Insert Information from Google Sheet
 - ⊗ Origin = [PlatOps+OpsDel] 4. Shipping Prices.Origin Country Name
 - ⊗ Destiny = [PlatOps+OpsDel] 4. Shipping Prices.Destiny Country Name
 - ⊗ ServiceDescription = [PlatOps+OpsDel] 4. Shipping Prices.Service
 - ⊗ Currency = [PlatOps+OpsDel] 4. Shipping Prices.Currency
 - ⊗ StoreName = [PlatOps+OpsDel] 4. Shipping Prices.Store
 - ⊗ Price = [PlatOps+OpsDel] 4. Shipping Prices.Shipping Value
 - ⊗ Threshold = [PlatOps+OpsDel] 4. Shipping Prices.Threshold
 - ⊗ ThresholdPrice = [PlatOps+OpsDel] 4. Shipping Prices.ThresholdPrice
 - ⊗ Enable Hazmat = [PlatOps+OpsDel] 4. Shipping Prices.Enable HAZMAT
 - ⊗ Hazmat Cost = [PlatOps+OpsDel] 4. Shipping Prices.HAZMAT Cost
- Click on the check symbol
- Click on Ok

➔ If the column **Shipping Selection Only** is set as **FALSE**, go to the next step.

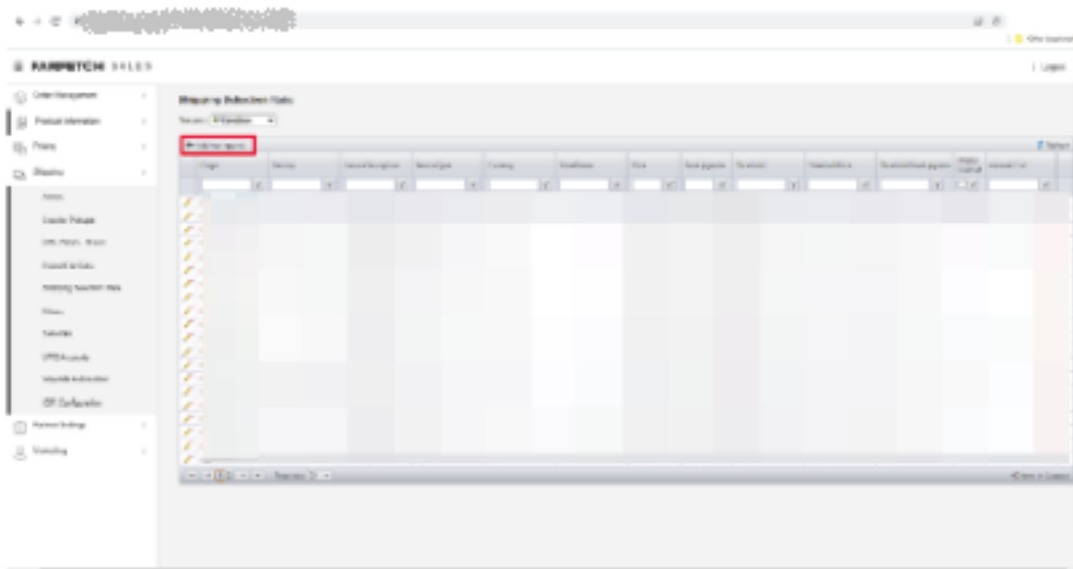
✔ Else, go to **Solve Case** with success code **RPA-4099: S-1 (RPA-3342) Route created successfully.**
 CLOSED .

✘ If it is **not** possible to create a route, raise **Business Exception** with reason **RPA-4092: BE-13 (RPA-3342) Can't create route.** CLOSED .

Figure C.11: Commercial Routes Creation Process Documentation - eighth part



Enter "Shipping Selection Rate"



Add new record on Shipping Selection Rate

Figure C.12: Commercial Routes Creation Process Documentation - ninth part

1. Edit Portal Flat Rate

- Go to "Portal Flat Rate"
- Select "Tenant"
- Find the Express Route:
 - ⊕ Origin = [PlatOps+OpsDel] 4. Shipping Prices.Origin Country Name
 - ⊕ Destiny = [PlatOps+OpsDel] 4. Shipping Prices.Destiny Country Name
 - ⊕ ServiceName = [PlatOps+OpsDel] 4. Shipping Prices.Service
 - ⊕ ServiceType = Express
 - ⊕ Currency = [PlatOps+OpsDel] 4. Shipping Prices.Currency
 - ⊕ StoreName= [PlatOps+OpsDel] 4. Shipping Prices.Store
- Read ThresholdPrice form the Express Route.
- Find the Standard Route:
 - ⊕ Origin = [PlatOps+OpsDel] 4. Shipping Prices.Origin Country Name
 - ⊕ Destiny = [PlatOps+OpsDel] 4. Shipping Prices.Destiny Country Name
 - ⊕ ServiceType = Standard
 - ⊕ Currency = [PlatOps+OpsDel] 4. Shipping Prices.Currency
 - ⊕ StoreName= [PlatOps+OpsDel] 4. Shipping Prices.Store
- Read ThresholdPrice form the Standard Route.
- Edit

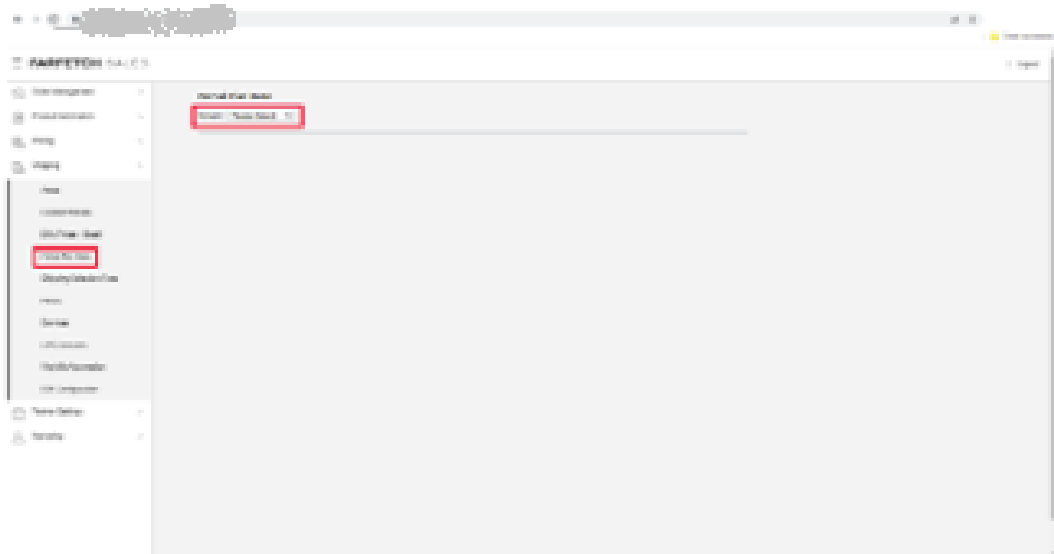
✔ If the ThresholdPrice form the Express Route is edited, go to **Solve Case** with success code RPA-4100: S-2 (RPA-3342) Route edited in Portal Flat Rate successfully. CLOSED .

✘ If it is not possible to edit on Portal Flat Rate, raise **Business Exception** with reason RPA-4093: BE-14 (RPA-3342) Not possible to edit price on Portal Flat Rate. CLOSED .

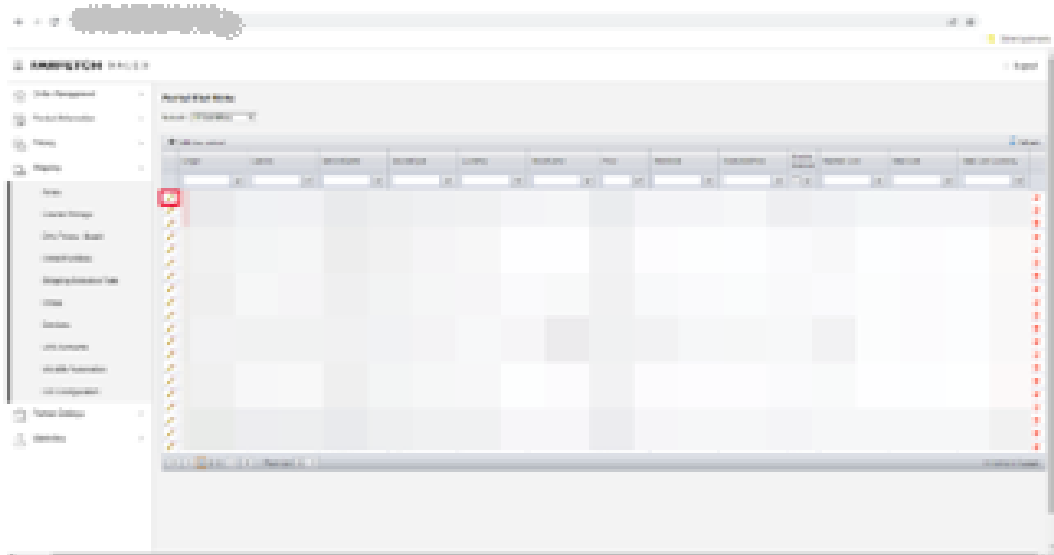
✘ If it is not possible to find the Express route, raise **Business Exception** with reason RPA-4094: BE-15 (RPA-3342) Not possible to find the Express route. CLOSED .

✘ If it is not possible to find the Standard route, raise **Business Exception** with reason RPA-4095: BE-16 (RPA-3342) Not possible to find the Standard route. CLOSED .

Figure C.13: Commercial Routes Creation Process Documentation - tenth part



Enter "Portal Flat Rate"



Edit on "Portal Flat Rate"

Figure C.14: Commercial Routes Creation Process Documentation - eleventh part

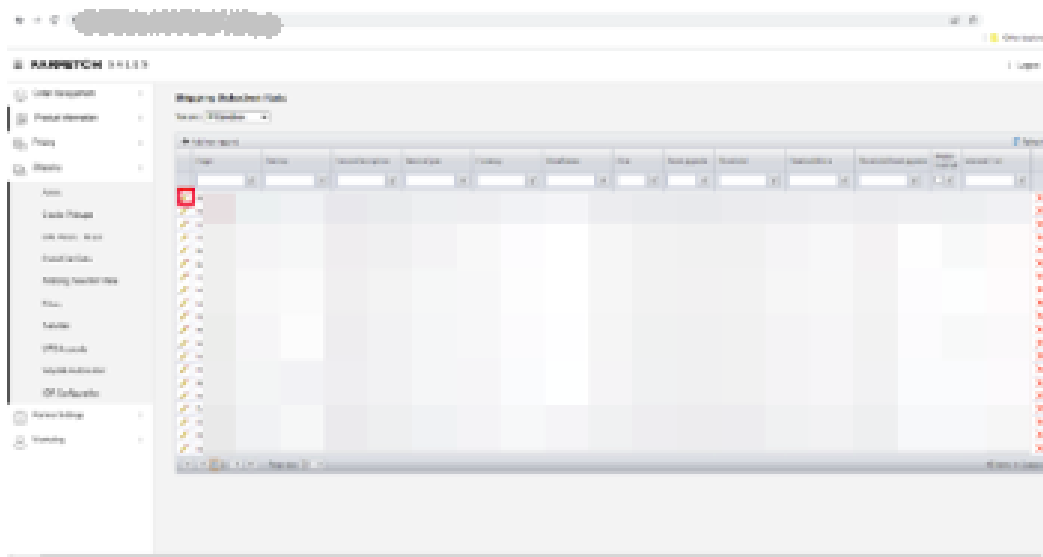
Edit Commercial Routes

- Search for the route where:
 - Origin = [PlatOps+OpsDel] 4. Shipping Prices.Origin Country Name
 - Destiny = [PlatOps+OpsDel] 4. Shipping Prices.Destiny Country Name
 - ServiceDescription = [PlatOps+OpsDel] 4. Shipping Prices.Service
 - Currency = [PlatOps+OpsDel] 4. Shipping Prices.Currency
 - StoreName= [PlatOps+OpsDel] 4. Shipping Prices.Store
- Edit existing route on Shipping Selection Rate by clicking "edit"
- If the column Shipping Selection Only is FALSE, go back to step 1. Edit Portal Flat Rate (previous activity)

✓ If the route is edited, go to **Solve Case** with success code [RPA-4101: S-3 \(RPA-3342\) Route edited successfully.](#) **CLOSED**

✗ If it is not possible to find the line to edit, raise **Business Exception** with reason [RPA-4096: BE-17 \(RPA-3342\) No route found to edit or delete.](#) **CLOSED**

✗ If the value on [PlatOps+OpsDel] 4. Shipping Prices.Threshold is not the same as the value on the column "Threshold" on Shipping Selection Rate or Portal Flat Rate, raise **Business Exception** with reason [RPA-4097: BE-18 \(RPA-3342\) Price is not the same as in Shipping Configuration File.](#) **CLOSED**



Edit on "Shipping Selection Rate"

Figure C.15: Commercial Routes Creation Process Documentation - twelfth part

Delete Commercial Routes

- Search on Shipping Selection Rate for the route where:
 - Origin = (FlatOps+OpsDel) & Shipping Prices.Origin Country Name
 - Destiny = (FlatOps+OpsDel) & Shipping Prices.Destiny Country Name
 - ServiceDescription = (FlatOps+OpsDel) & Shipping Prices.Service
 - Currency = (FlatOps+OpsDel) & Shipping Prices.Currency
 - StoreNames= (FlatOps+OpsDel) & Shipping Prices.Store
- Delete that route on Shipping Selection Rate by clicking "Delete"
- Search on Portal Flat Rate for the route where:
 - Origin = (FlatOps+OpsDel) & Shipping Prices.Origin Country Name
 - Destiny = (FlatOps+OpsDel) & Shipping Prices.Destiny Country Name
 - ServiceDescription = (FlatOps+OpsDel) & Shipping Prices.Service
 - Currency = (FlatOps+OpsDel) & Shipping Prices.Currency
 - StoreNames= (FlatOps+OpsDel) & Shipping Prices.Store
- Delete that route on Portal Flat Rate by clicking "Delete"

✔ If the route is deleted, go to **Solve Case** with success code RPA-4102: 5-4 (RPA-3342) Route delete d successfully. CLOSED .

✘ If it is not possible to delete the route, raise **Business Exception** with reason RPA-4098: BE-19 (RPA-3342) Can't delete route. CLOSED .

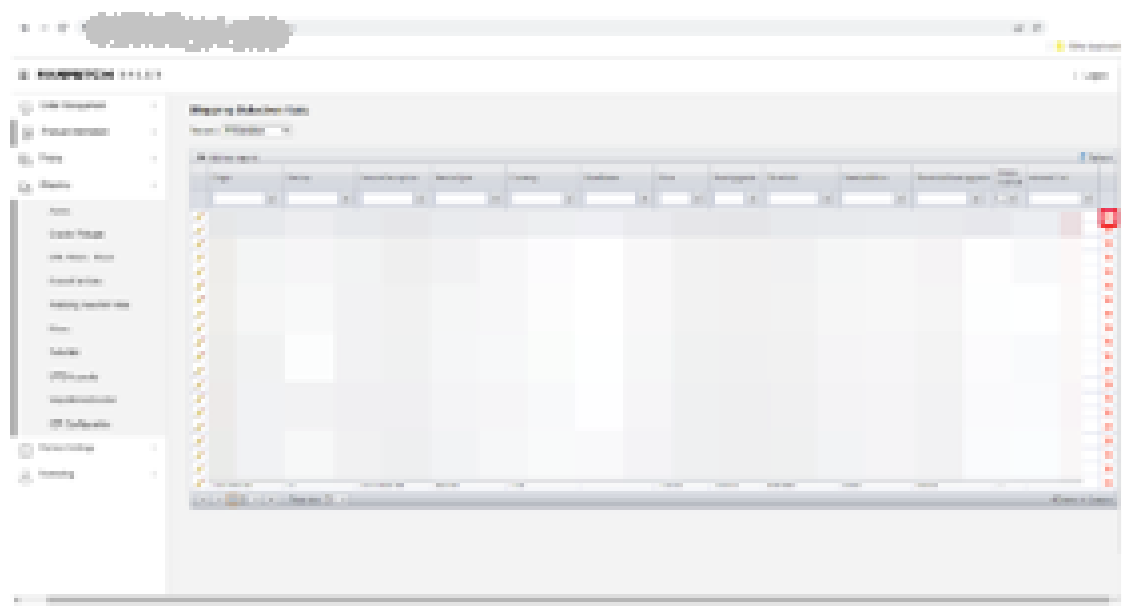


Figure C.16: Commercial Routes Creation Process Documentation - thirteenth part

Solve Case

- Reattribute permissions to edit file for everyone that had edit access.
- Post a comment with the success reason.
- Set:
 - ⊗ Status = Closed
 - ⊗ Resolution = Done
 - ⊗ Assignee = Reporter

Escalate Case

- Reattribute permissions to edit file for everyone that had edit access.
- Post a comment with the reason for escalation.
- Set:
 - ⊗ Assignee = Super Agent
 - ⊗ Status = In Refinement

Figure C.17: Commercial Routes Creation Process Documentation - fourteenth part

Appendix D

RTO Requests v2

Proposal Name	RTO Requests v2	
Business Area	Customer Operations	
Director		
SME		
Process Owner		
Project Manager		
Business Analyst		
Developer		
Data Analyst		
ROI Analyst		
E&D Analyst		
Other savings beside time	FALSE	(Optional, if false)
Projected process changes	FALSE	(Optional, if false)
Trigger	Case	
Work auto assigned	TRUE	
SLA	1 hour	

	Estimation	Unit	Owner	Ticket ID
Development Effort	25	(days)	Dev	CORPAPP-3204
Last 12 months volume	59018	(cases)	SME	
% of volume in peak	55%	(% of cases)	SME	NA
Average handling time	475	(seconds)	Data	WFO-25600
% of AHT Reduction	100%	(percentage)	SME	NA
Expected adoption	100%	(percentage)	SME	NA
Previous version savings		(hrs)	ROI	WFO-28514
Expected savings	7803.23	(hours/year)	ROI	
Expected savings		(hrs)	ROI	
Expected savings		(dollars/year)	ROI	
Savings after costs		(dollars/year)	ROI	
Maintenance costs		(dollars/year)	ROI	
Cost per WL		(dollars)	ROI	
ROI		(percentage)	ROI	
EBV		(FTE/Volumes in peak/SLA)		

Figure D.1: RTO Requests v2 Business Case - first part

id	Activity Name	Applications Used	Description	Transitions	Notes
A-1	Find Cases	Salesforce	<ul style="list-style-type: none"> 1. Subject starts with "ECMS RTO Request" or "Browne NL Direct RTO Request" or "TMALL RTO Request" or "RTO Request" or "RTO by Fraud" or "Premium Service Delivery Support - VIP RTO Request" or "Address Correction - Order" - Owner = DS or PrS - Status = New or Open - Tenant = Hamods (50000) - Is private client: If DS = False - Record Type = DS or Premium Service 2. Else: - Status = On Hold - Owner = SE/RPA - Case Record Type = Delivery Support or Premium Services - Tenant = Farfetch (finally set status as Pending and Owner as SE/RPA) 	Go to next activity	
A-2	Acknowledge	Salesforce	<ul style="list-style-type: none"> Get Salesforce fields Check Duplicate Validations SF fields -> 2. Return/New Tracking Number = value not null - Outcome 'includes' = RTO Read Posts 	<ul style="list-style-type: none"> If Duplicate, go to Solve Case Else, if post contains "Disregard" or "ignore", go to Return Case Else, if TMALL read AWB, go to Get BO Else, if scenario 2 if RTO AWB is empty go to Escalate Case Else, if scenario 2 and RTO AWB is not empty go to Create Return Else, go to Get BO information 	
A-3	Get BO	Sales	<ul style="list-style-type: none"> If not TMALL skip this activity Else, Get BO based on AWB 	Go to next activity	
A-3	Get BO information	Storm	<ul style="list-style-type: none"> Get BO information: - Delivery to "Country" - Collecting from "Country" 	Go to next activity	

Figure D.2: RTO Requests v2 Business Case - second part

A-4	Tracking Check	Carrier Website	Read shipping history AWB movements validations Monitoring AWB	If In Transit and subject starts with "Address Correction" go to Return Case Else, If In Transit, go to Request RTO Else, If Delivered and subject not contains ECMS, go to Solve Case Else, If Delivered and subject contains ECMS, send email to ECMS Else, Continue Monitoring (except for subject starts with "Address Correction" and carrier is DPD UK or UPS US) If monitoring time exceed, go to Return Case
A-5	Request RTO	Salesforce	Check RTO Reason Send Email to Carrier	If RTO Reason is empty, set: - RTO Reason = "Impossibility to Receive Shipment" - RTO Reason Details = RPA Else, go to next activity
A-6	Check Carrier reply	Salesforce	Get posts and emails from SF Monitoring reply or request update	If DHL and cannot find RTO AWB on carrier email, go to Provision Else, If RTO AWB exist, go to Create Return Else, If post/email contains delivered or unsuccessful: - If subject contains Fraud, go to Return Case - Else, If subject contains TMALL, go to Solve Case - Else, If Tenant != FARFETH, go to Solve Case - Else, go to Solve Case Else, if unknown message go to Return Case Else, Monitoring If monitoring time exceed, go to Return Case

Figure D.3: RTO Requests v2 Business Case - third part

A-6.1	Proview	DHL tool (website)	Site Login (generic user) View outbound Find shipment by Waybill Keyword = AWB (from SF case) Click more Read Remark field (find 10 numbers sequence)	If cannot find RTO AWB ID, go to Monitoring (previous activity) Else, go to next activity
A-7	Create Return	Storm, Sales	Validate Order Step Check existing Returns Check if existing AWB is RTO AWB, if not cancel and create Return Create Return Validate Return Type Return Validations	If BE, go to Escalate Case If success code, go to Solve Case Else, go to Create Child Case
A-8	Create Child Case	Salesforce	Create child case to: - Partner Service - CCC (if exists a case already created consider as duplicate for CCC case skip child case creation - Case Record Type = CCC Outcome = Refund Completed OR Already Refunded; Status = Solved OR Closed, Refund Reason (includes RTO OR Full Refund If duplicate found, Solve case) - Premium Service	If child case created para PIS or CCC, go to Solve Case Else, (if PS) go to Return Case

Figure D.4: RTO Requests v2 Business Case - fourth part

A-9	Solve Case	Salesforce	Set: If scenario 1: - Owner = Super agent - Status = Solved If scenario 2: - Owner = previous agent - Status = Solved	End
A-10	Escalate Case	Salesforce	Set: - Owner = previous queue - Status = Reopen	End
A-11	Return Case	Salesforce	Set: - Owner = previous queue - Status = Reopen	End

Figure D.5: RTO Requests v2 Business Case - fifth part

RTO Requests v2

2 min read • 10 people viewed

Department	Operations - Service Excellence
Business Area	Customer Operations
Process SME	
Process Owner	
Applications Used	Salesforce, Sales, Storm, Carrier's website, DHL tool (website)
Proposal ID	
Business Case	
Appendix File	
Test Scenarios	
RPA ID	

Overview

This process aims to automatize DS's RTO process, where RPA handles DHL, FedEx, UPS and DPD carrier-related cases. RTOs happen when the courier cannot deliver the shipment due to non-availability or cancellation of the sender/recipient; hence, it is sent back to the shipper.

Process Flow

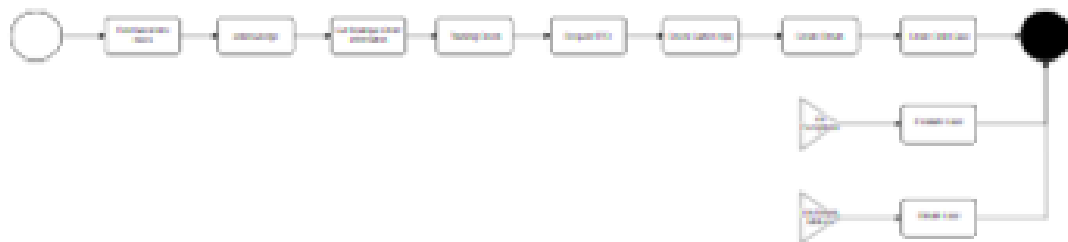


Figure D.6: RTO Requests v2 Process Documentation - first part

Main Activities

- Find Salesforce Cases
- Acknowledge Case
- Get Boutique Order Information
- Tracking Check
- Request RTO
- Check Carrier reply
- Preview
- Create Return
- Create Child Case
- Solve Case
- Escalate Case
- Return Case

Find Salesforce Cases

This automation should process all cases that match the followings filters:

Scenario 1:

- Subject starts with "ECMS RTO Request" or "TMALL RTO Request" or "RTO Request" or "RTO by Fraud" or "Premium Service Delivery Support - VIP RTO Request -" or "Address Correction - Order:"
- Owner = DS or PrS
- Status = New or Open
- Tenant =
- Is Private Client:
 - ⊗ If DS = False
- Record Type = DS or Premium Service

Scenario 2:

- Status = On Hold
- Owner = SE,RPA
- Case Record Type = Delivery Support or Premium Services
- Tenant =

Finally set:

- Status = Pending
- Owner = SE,RPA

Figure D.7: RTO Requests v2 Process Documentation - second part

Acknowledge Case

1. Get Fields from Salesforce

- Fields:
 - ⊗ Case Number
 - ⊗ Status
 - ⊗ Boutique Order
 - ⊗ Tracking Number
 - ⊗ Outcome
 - ⊗ Tenant
 - ⊗ Subject
 - ⊗ Contact Name
 - ⊗ Is Private Client
 - ⊗ RTO Reason
 - ⊗ Portal Order
 - ⊗ Parent Case Record Type
 - ⊗ Parent Case Case Number
 - ⊗ Posts
- › Get Fields from Salesforce

Figure D.8: RTO Requests v2 Process Documentation - third part

2. Validation on case fields

- ✘ If Owner is not "SERPA", raise **Business Exceptions** with the reason RPA-1914: BE-1001 Case not acknowledged. Owner not expected CLOSED.
- ✘ If Status is not "Pending", raise **Business Exceptions** with the reason RPA-1915: BE-1002 Case not acknowledged. Status is not Pending CLOSED.

- Check the AWB Number field and Subject:
 - ⊕ Get carrier and store name based on Portal Order:
 - Go to Storm SCV
 - Go to Customers Search
 - Set Site as Salesforce case tenant
 - Search by Portal Order
 - Read Tracking Code
 - Read Courier
 - Read Name from "Collecting from"

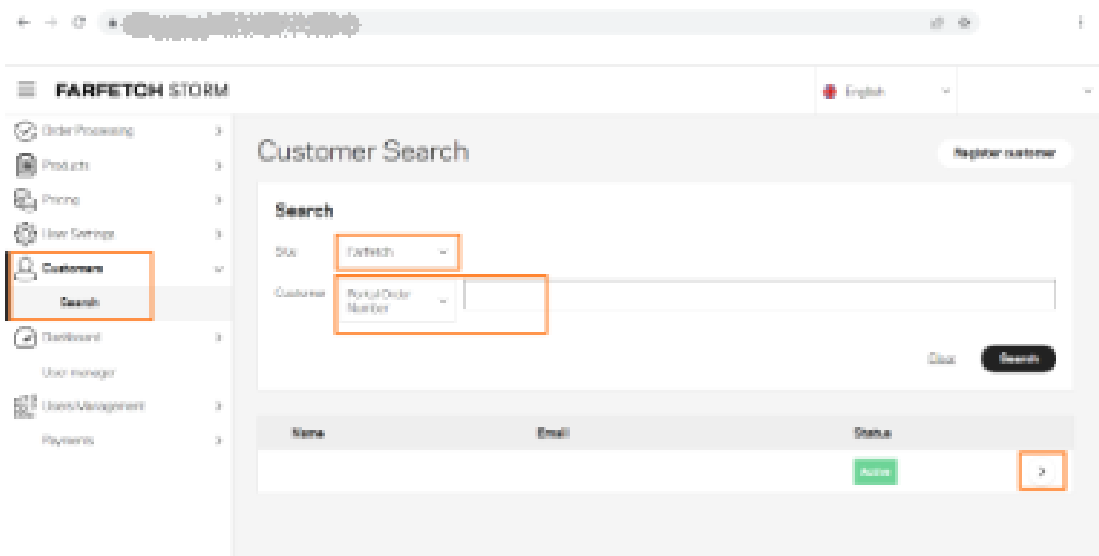
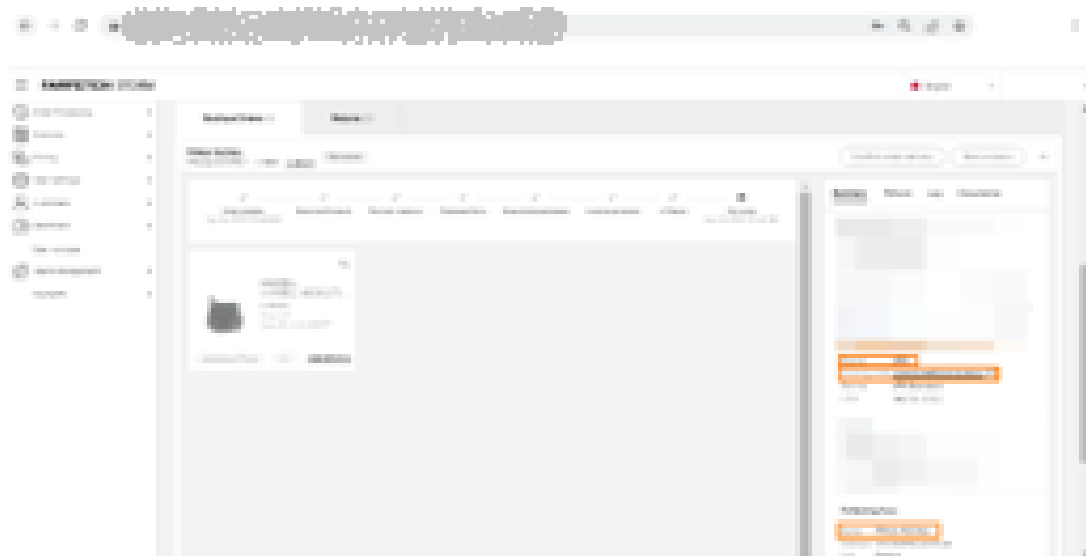


Figure D.9: RTO Requests v2 Process Documentation - fourth part



✖ If Courier is not DHL, UPS, FedEx or DPC, raise **Business Exception** with reason [RPA-3615: BE-1 \(RPA-3600\) Carrier not allowed to be processed.](#) **CLOSE**

✖ If it is not possible to execute this search by setting Site as _____, raise **Business Exception** with reason [RPA-3616: BE-2 \(RPA-3600\) Customer not found.](#) **CLOSE**

✖ If the field Name from "Collecting from" contains _____, raise **Business Exception** with reason **Store Name is {{name}}**.

- Validate the Tracking Number:
 - If the Tracking Code on Store is not the same as the Tracking Number in the Salesforce case, set Tracking Number as the Tracking Code on Store.
- If the subject does not contain _____, check the Boutique Order field and Summary:

✖ If no Boutique Order is provided, raise **Business Exception** with reason [RPA-3619: BE-3 \(RPA-3600\) Boutique Order not found.](#) **CLOSE**

- If the subject contains _____:
 - Set Tenant : _____
- Read all Posts

⚠ If a post contains "Disregard" or "Ignore", go to **Return Case** with return motive [RPA-3620: RM-1 \(RPA-3600\) Post contains "Disregard" or "Ignore"](#) **CLOSE**

Figure D.10: RTO Requests v2 Process Documentation - fifth part

- Check Return/New Tracking Number:

➔ If it is in Scenario 2 and Return/New Tracking Number is not empty, go to **Create Return**.

✘ If it is in Scenario 2 and Return/New Tracking Number is empty, raise **Business Exception** with reason RPA-3622: BE-4 (RPA-3600) Return/New Tracking Number is empty. CLOSED.

✘ If the Outcome does not contain "RTO", raise **Business Exception** with reason RPA-3623: BE-5 (RPA-3600) Outcome does not contain "RTO". CLOSED.

- If Main Category =! Delivery and Subcategory =! Failed Attempts or Impossibility:

- Set:

- Main Category = Delivery
- Subcategory = Impossibility to Receive

- Finally set:

- ⚠ • Boutique Order (if subject does not contain "TMALL")
- AWB
- Owner = SE.RPA
- Status = Pending

3. Check Duplicate

Use Salesforce Global Search to find all duplicate cases:

- Same Boutique Order or AWB and Status=! Solved or Closed

OR

- Same Subcategory and Status=Solved

✔ If a duplicate exists, go to **Solve Case** with success code RPA-3631: S-1 (RPA-3600) Duplicate
CLOSED.

Figure D.11: RTO Requests v2 Process Documentation - sixth part

Get Boutique Order Information

1. Get Boutique Order

ⓘ If subject does not contain [redacted], skip this step.

- If the subject contains [redacted]
 - Go to Storm SCV [redacted]
 - Go to Customers Search [redacted]
 - Set Site as [redacted]
 - Search by Tracking Number [redacted]
 - Read Boutique Order number [redacted]

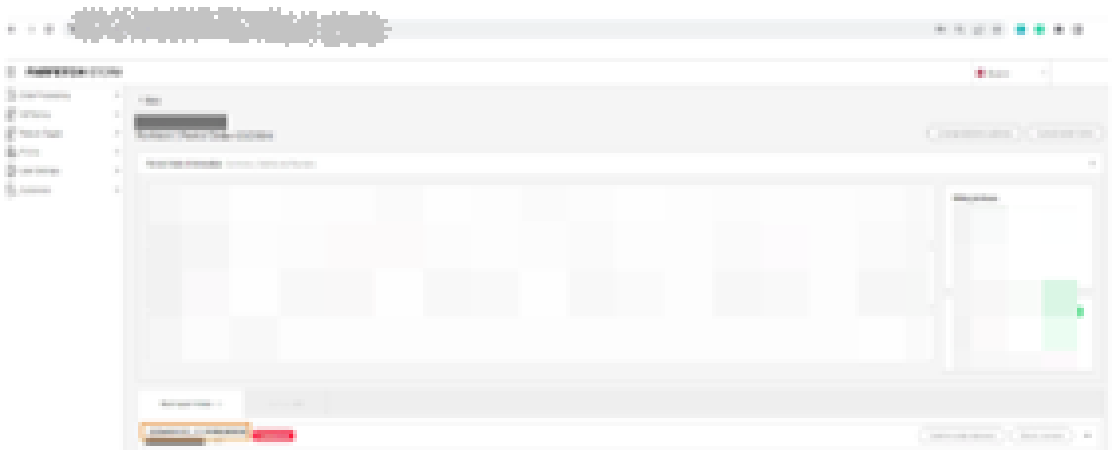
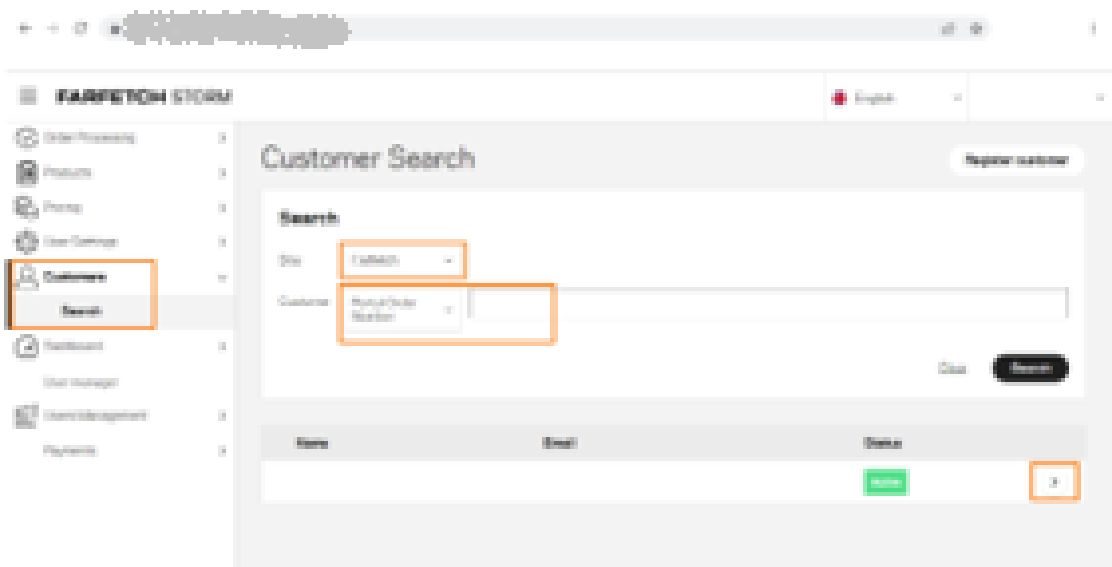
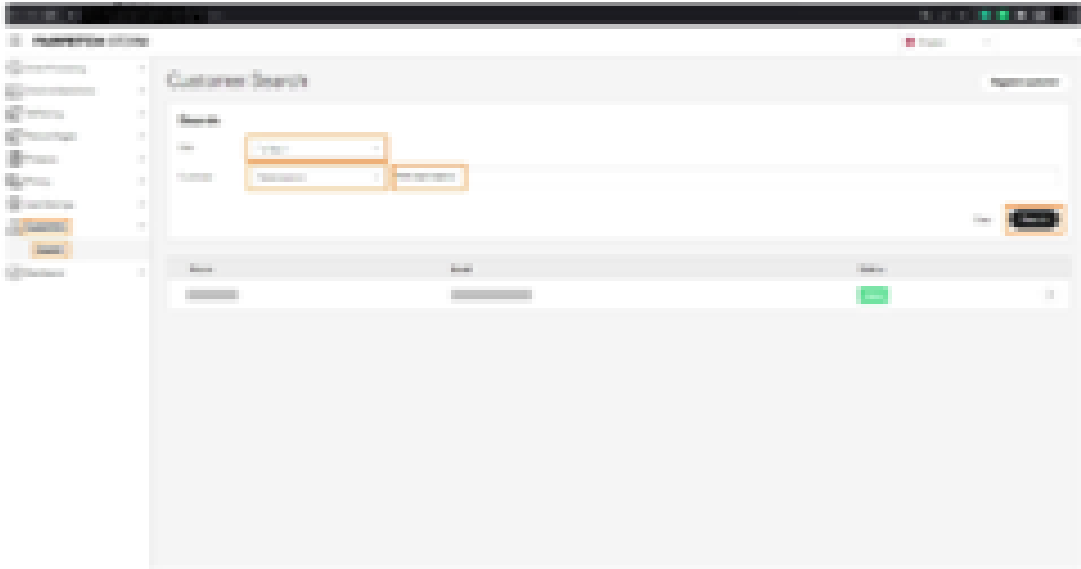


Figure D.12: RTO Requests v2 Process Documentation - seventh part

Finally set Boutique Order.

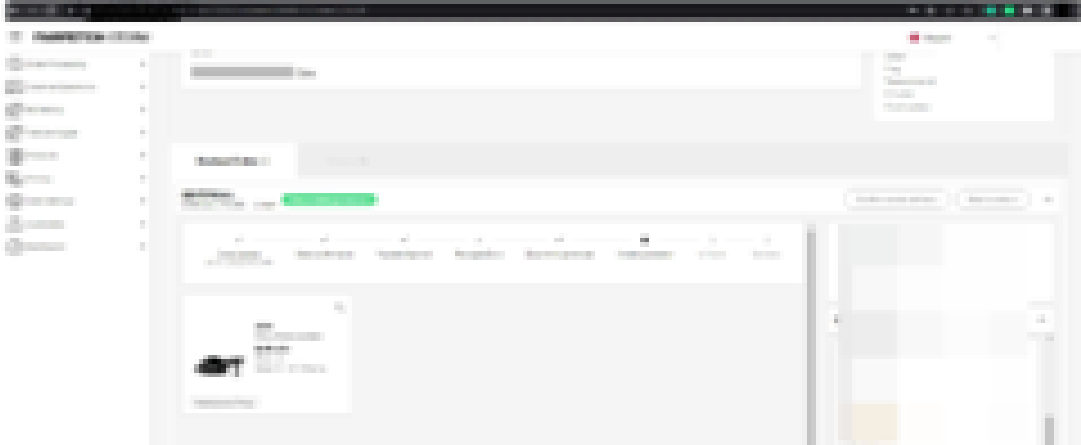
2. Get Boutique Order Information

- Get Site as Salesforce case tenant
- Search by Boutique Order



The screenshot shows the Salesforce Customer Search interface. The search criteria are: Name: 'C...', Case: 'Boutique Order Summary', and a 'Search' button. Below the search bar is a table with columns 'Name', 'Last', and 'View'. The table contains one entry with a green 'View' button next to it.

- From Store:
 - From Delivery to, get "Country"
 - From Collecting from, get "Country"
 - From Boutique Order Summary, get "Currency" (Shipping)




The screenshot shows the Salesforce Order Summary interface. It displays a navigation bar with tabs for 'Summary', 'Items', 'Shipping', 'Billing', 'Returns', 'Comments', 'History', 'Print', and 'Close'. Below the navigation bar, there is a section for 'Order Summary' with a green status bar and a table of items.


Figure D.13: RTO Requests v2 Process Documentation - eighth part

Tracking Check

1. Read Shipping History on Carrier Website

 Check the Reusable Activities section.

2. AWB movements validation

 Check the Reusable Activities section.

- If Carrier is **DHL**:


If the event type is **PICKED UP** or **IN TRANSIT** or **CUSTOMS HOLD** - consider AWB as **IN TRANSIT**

Else, if the event type is **RETURN TO ORIGIN** , go to Preview

Else, consider AWB as **NOT IN TRANSIT**

- If Carrier is **UPS**:

If the event type is **PICKED UP** or **IN TRANSIT** and the customer is **not** from the **US** - consider AWB as **IN TRANSIT**

 If **IN TRANSIT** and the customer is from the US, go to **Return Case** with return motive **RPA-3629: RM -2 (RPA-3600) UPS US order - please fulfil request on website.** **CLOSED** .

Else, consider AWB as **NOT IN TRANSIT**

- If Carrier is **FedEx**:

If the event type is **PICKED UP** or **IN TRANSIT** or **CUSTOMS HOLD** - consider AWB as **IN TRANSIT**

Else, if the event type is **RETURN TO ORIGIN** , read "Return tracking number" from Travel History on FedEx's website

Else, **NOT IN TRANSIT**

Figure D.14: RTO Requests v2 Process Documentation - ninth part

- If carrier is **DPD UK**:

If the event type is **PICKED UP** or **IN TRANSIT** - consider AWB as **IN TRANSIT**

Else, consider AWB as **NOT IN TRANSIT**

- If carrier is **DPD NL**:

If the event type is **PICKED UP** or **IN TRANSIT** - consider AWB as **IN TRANSIT**

Else, consider AWB as **NOT IN TRANSIT**

▲ If AWB is considered **IN TRANSIT** and the carrier is **DPD UK**, go to **Return Case** with return motive **RPA-3630: RM-3 (RPA-3600) AWB is In Transit and carrier is DPD UK. Needs agent handling.** **CLOSED**

▲ If AWB is considered as **IN TRANSIT** and subject starts with "Address Correction", go to **Return Case** with return motive **RPA-3675: RM-4 (RPA-3600) AWB is In Transit and subject starts with "Address Correction"** **CLOSED**

➕ If AWB is consider as **IN TRANSIT**, go to **Request RTO**.

✔ If it's a Premium Case and Tracking Number is delivered, go to **Solve Case** with outcome **RPA-3632: S-2 (RPA-3600) Delivered (PrS)** **CLOSED**

✔ If Delivered and subject does not contain ECMS, go to **Solve Case** with outcome **RPA-3633: S-3 (RPA-3600) Delivered and subject does not contain ECMS** **CLOSED**

If Delivered and subject contains ECMS, send email to **ECMS@dpd.com**

- Change contact to **ECMS@dpd.com**
- Send the email with the template **RTO request-ECMS**

▲ If the subject starts with "Address Correction", go to **Return Case** with return motive **RPA-3677: RM-5 (RPA-3600) Subject starts with "Address Correction"** **CLOSED**

▲ If the carrier is **DPD UK** or **UPS US**, go to **Return Case** with return motive **RPA-3678: RM-6 (RPA-3600) Carrier is {{carrier}}** **CLOSED**

Else, go to **Monitoring AWB**.

Figure D.15: RTO Requests v2 Process Documentation - tenth part

3. Monitoring AWB

Check if there is a movement with an interval of 6 hours for:

- If the order is : (recuperator list: prefixes for BO) during 5 days
- If it's a Premium Service Case during 3 days
- Else, during 2.5 days or 5 days if peak season

➔ If it's a Premium Service case and the maximum time of monitoring is exceeded and there is no movement on the shipping history, post a message on the Parent Case "Not Picked Up".

⚠ After post a message on the Parent Case, go to **Return Case** with return motive **closed**.

➔ Else, if Tenant! = and the maximum time of monitoring is exceeded create a child case to PS, go to **Create Child Case** (to PS)

⚠ After creating a child case to PS, go to **Return Case** with return motive **closed**.

⚠ Else, if Tenant = and the maximum time of monitoring is exceeded, go to **Return Case** with return motive **closed**.

Figure D.16: RTO Requests v2 Process Documentation - eleventh part

Request RTO

1. Storm validations

- Check RTO Reason:
 - If RTO Reason is empty, set:
 - RTO Reason = "Impossibility to Receive Shipment"
 - RTO Reason Details = RPA

2. Send Email to carrier

Use Salesforce to send the email, do this one time per case.

2.1 If the Carrier is DHL:

- Change contact to "DHL Support PCs"
- Send the email with the template "RTO request - DHL"

If cannot send email to carrier, raise **Business Exception** with reason **RPA-3624: BE-G (RPA-3600) N** or possible to send email to carrier. **CLOSED**

2.2 If the Carrier is FedEx:

- If shipping from is EU, send an email to [REDACTED]
- If shipping from is US, send an email to [REDACTED]
- Templates:
 - If the Boutique Order is from [REDACTED] (recuperator list), use the template "RTO Request - FedEx"
 - Else, use the template "RPA - RTO Request - FedEx NoSG"

If cannot send email to carrier, raise **Business Exception** with reason **RPA-3624: BE-G (RPA-3600) N** or possible to send email to carrier. **CLOSED**

2.3 If the Carrier is UPS:

- Change contact to UPS UK
- Send the email with the template "RTO Request - UPS"

If cannot send email to carrier, raise **Business Exception** with reason **RPA-3624: BE-G (RPA-3600) N** or possible to send email to carrier. **CLOSED**

Figure D.17: RTO Requests v2 Process Documentation - twelfth part

Check Carrier reply

☑ Check if there is a reply with an interval of 6 hours, during a maximum of 4 weeks.

1. Get posts and emails from Salesforce

➕ If carrier is DHL and cannot find RTO AWB on carrier email, go to **Preview**.

(Ignore "Integration User" user)

If the email body has the message "monitor", "hold", "request", or "update":

- Set Status as Pending
- Check again later (repeat this activity)

Else, check **RTO AWB**:

➕ If RTO AWB exist, go to **Create Return**.

Else, if post/email contains "Delivered" or "Unsuccessful", check the Salesforce case:

- If the case subject contains "Fraud":
 - Post a message in Case: "Delivered - Please attach POD"

⚠ Go to **Return Case** with return motive ☑ RPA-3681: RM-8 (RPA-3600) Fraud Case - Delivered closed.

- If the case Subject contains "Delivered":
 - Send an email to [redacted] with the following message: - **RTO Result Failed: Shipment**

☑ Go to **Solve Case** with outcome ☑ RPA-3634: S-4 (RPA-3600) Delivered closed.

- If Tenant is not [redacted]:
 - Post message: [redacted]
 - On the parent case (if not closed):
 - Set Status = Re-Open
 - Don't make any posts on the Parent Case

☑ Go to **Solve Case**, with outcome ☑ RPA-3634: S-4 (RPA-3600) Delivered closed.

- Else,

☑ Go to **Solve Case**, with outcome ☑ RPA-3634: S-4 (RPA-3600) Delivered closed.

Figure D.18: RTO Requests v2 Process Documentation - thirteenth part

- Else,

⚠ If unknown message, go to **Return Case** with return motive [RPA-3682: RM-9 \(RPA-3600\) Unknown Message](#) **closed**.

⚠ If monitoring time is exceeded, go to **Return Case** with return motive [RPA-3683: RM-10 \(RPA-3600\) Monitoring time is exceeded](#) **closed**.

2. Monitoring reply or request update

If DS and it's been 7 days since the last message,

If PrS:

- The customer is from Mexico and it's been 3 days since the last message. After the first push send it, if needed, every 2 weeks.
- Else, it's been 3 days since the last message. After the first push send it, if needed, every week.
- If Case Status = Re-Open (re-opened by Salesforce):
 - Set Status = Pending
 - Send an email to the carrier with the message:

Hi team

Any update on this?

All the best,

Delivery Support Team / Premium Services Team

Delivery Support Team

🔄 Check if there is a reply with an interval of 6 hours:

- If Premium Services case and customer is from Mexico, during a maximum of 8 weeks (since first email was sent)
- Else, during a maximum of 4 weeks (since first email was sent).

✖ If maximum monitoring time is exceed, raise **Business Exception** with reason [RPA-3625: BE-7 \(RPA-3600\) RTO not provided by Carrier within estimated time \(4 weeks\)](#) **closed**.

Figure D.19: RTO Requests v2 Process Documentation - fourteenth part

Preview

- Go to site - <https://www.dhl.com>
- Set User Name and Password
- Click Login
- Click "View Outbound"
- Set "Find shipment by" as "Waybill"
- Set "Keyword" as {{AWB}}
- Click Find
- Click More
- Read Remark field (find 10 numbers sequence)

➔ If cannot find RTO AWB ID and the event type is **RETURN TO ORIGIN**, go to Request RTO.

➔ Else, go to Monitoring reply or request update (previous activity).

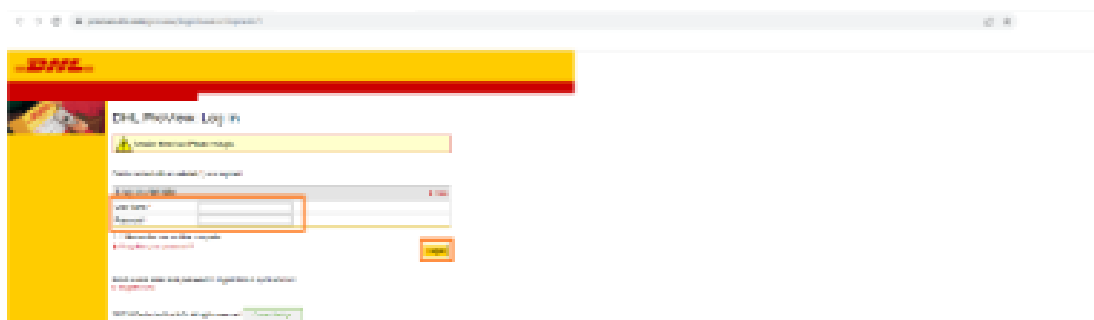
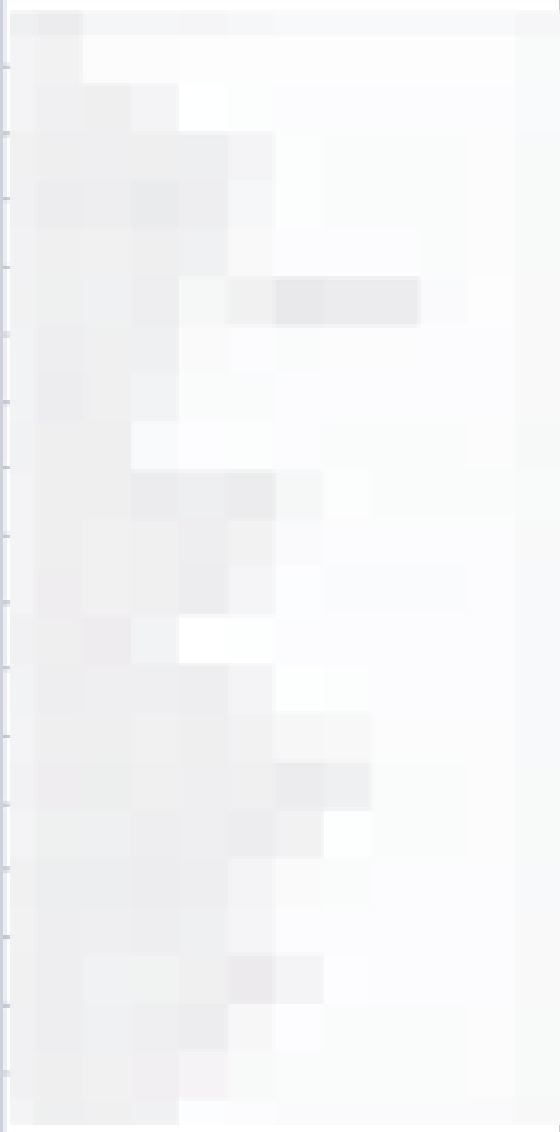


Figure D.20: RTO Requests v2 Process Documentation - fifteenth part

Create Return

After acknowledging that we have an RTO AWB, we can proceed with this step.

RTO REASON DETAILS	Refund Reason
	

1. Validate Order Step

- Go to Sales
- Go to Order Management
- Select Search for "Order Number"

Figure D.21: RTO Requests v2 Process Documentation - sixteenth part

➔ If the order is in **Step 6 - Parcel in Transit**, move the order to History and go to **Check existing returns**.

➔ If the order is in **History**, go to **Check existing returns**.

✘ If the order is not in step 6 or history, raise **Business Exception** with reason [RPA-3626: BE-8 \(RPA-3600\) Invalid active Step on Sales Order Process, expected Order on Step 6 or History.](#) **CLOSED**.

2. Check existing Returns

- Check if exists a Return:

✘ If exists >1 return with the status different from "Cancelled", raise **Business Exception** with reason [RPA-3627: BE-9 \(RPA-3600\) Found more than one return.](#) **CLOSED**.
- Validate Return Step
 - ⊗ If Return is in Step 4:
 - Input RTO AWB into the "Return/New Tracking Number" field on Salesforce

✔ Go to **Solve Case** with outcome [RPA-3635: S-5 \(RPA-3600\) RTO](#) **CLOSED**.

✘ If a return exists and it's not in Step 4, raise **Business Exception** with reason [RPA-4282: BE-10 \(RPA-3600\) Found created returns for the boutique order.](#) **CLOSED**.

3. Create the Return

- Go to Storm
- Start Return
- Select all items by clicking the "Select All" checkbox
- Select RTO Reason - "**Return to origin**" for all items

Figure D.22: RTO Requests v2 Process Documentation - seventeenth part

4. Validate Return Type

Validate the "Return Type" form:

- Number of packages: by default, is set as 1
- Refund Method: by default, is set as the Original Payment method
- Courier collection: Click on "Manual" tab

- On the Manual tab:
 - ⊗ Select the carrier in the "Courier" dropdown list
 - ⊗ Insert RTO AWB on "Tracking Number"

i In this step we're selecting the Courier that handled the Return process.

Figure D.23: RTO Requests v2 Process Documentation - eighteenth part

5. Return Validations

- If Subject includes `Return`
 - ⊕ Send an email to `[[email]]` with the following message: - **RTO Result Successful: RTO successful.**

✔ Go to **Solve Case** with outcome `RPA-3635: S-5 (RPA-3600) RTO CLOSED`.

- Else if, Case Record Type = **Delivery Support** and **Tenant !=**

✔ Go to **Solve Case** with outcome `RPA-3635: S-5 (RPA-3600) RTO CLOSED`.

- Else if, Parent Case Record Type = `Return`

- ⊕ Post a message on Parent Case:

RTO Successful - RTO AWB: {{rto awb}}. Return created.

➔ Go to **Create Child Case** (to Premium Service)

- Else,

➔ Go to **Create Child Case** (to CCC)

Figure D.24: RTO Requests v2 Process Documentation - nineteenth part

Create Child Case

1. Create Child Case to Partner Service (PS)

Set:

- Record Type = Partner Services
- Main Category = Delivery Tasks
- Sub Category = Shipping Issues - Delivery Tasks
- Subject: Order not picked up - Order {{boutique_order}}
- Boutique Order: boutique_order
- Tenant = same as original case
- Description:
 - ⊗ If (parent case record type) case origin is **Order Support**:
 - ⊗ Send the 1st message - "OS Has requested RTO for the above AWB due to FRAUD" (1) and delete the two below.
 - If (parent case record type) case origin is **Customer Service**:
 - ⊗ Send 2nd message - "CS Has requested RTO for the above AWB due to > 2.5 days in STEPS" (2) and delete the other two.

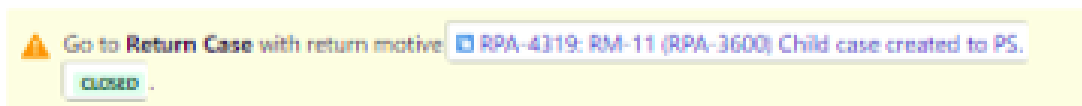
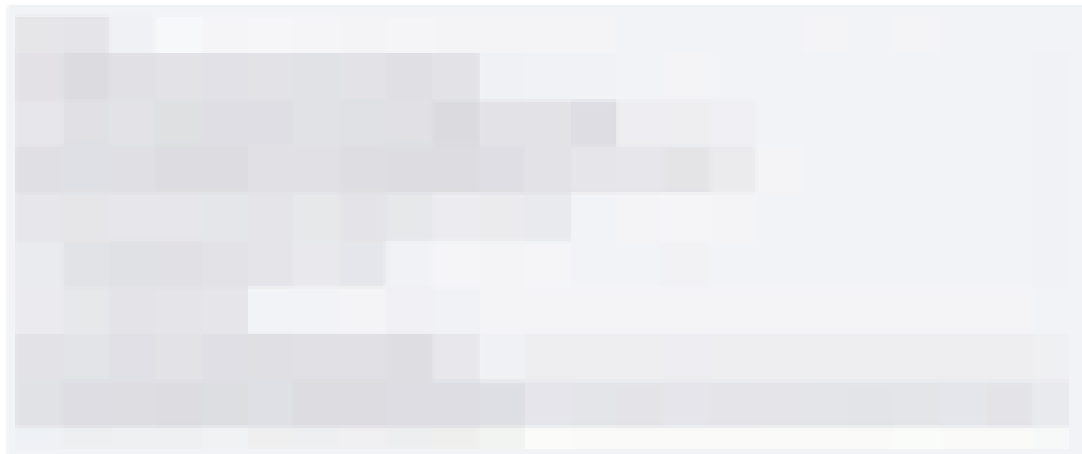


Figure D.25: RTO Requests v2 Process Documentation - twentieth part

2. Create Child Case to CCC

2.1 Check CCC duplicate cases

Use Salesforce Global Search to find all duplicate cases:

- Record Type = CCC
- Outcome = Refund Completed OR Already Refunded
- Status = Solved OR Closed
- Refund Reason 'includes' RTO OR Full Refund

✔ If there is a duplicate, go to **Solve Case** with outcome [RPA-3674: S-6 \(RPA-3600\) CCC Duplicate cases](#) **CLOSED** .

2.2 Create child case to CCC

- Record Type = CCC
- Category = Delivery
- Sub-Category = Impossibility to Receive
- Subject: Refund Request
- Boutique Order: boutique_order
- Refund Form: Yes
- Refund Type: Normal Refund
- Refund To: Customer Farfetch
- Refund Reason: refund_reason
- Currency: boutique_order_currency
- Boutique Order Amount: boutique_order_amount
- Refund Option: Boutique Order Amount

✔ Go to **Solve Case** with outcome [RPA-3635: S-5 \(RPA-3600\) RTO](#) **CLOSED** .

Figure D.26: RTO Requests v2 Process Documentation - twenty-first part

3. Create Child Case to Premium Service

- Record Type = Premium Services
- Category = Refund
- Sub-Category = Refund Request
- Subject: RPA Refund Request
- Boutique Order: boutique_order
- Refund Form: Yes
- Refund Type: Normal Refund
- Refund To: Customer Farfetch
- Refund Reason: refund_reason
- Currency: boutique_order_currency
- Boutique Order Amount: boutique_order_amount
- Refund Option: Boutique Order Amount
- Parent ID = RTO Parent Case

✔ Go to **Solve Case** with outcome [RPA-3635: S-5 \(RPA-3600\) RTO](#) **CLOSED** .

Figure D.27: RTO Requests v2 Process Documentation - twenty-second part

Solve Case

- If scenario 1:
 - ⊗ Set:
 - Owner = Super agent
 - Status = Solved
- If scenario 2:
 - ⊗ Set:
 - Owner = Previous agent
 - Status = Solved
- If it's a **DS** case:
 - ⊗ Set:
 - Outcome
 - Status = Solved
 - Owner:
 - If scenario 1, set as Super Agent
 - If scenario 2, set as Previous agent.
- If it's a **Premium Service** case:
 - ⊗ If the outcome is Delivered:
 - If Parent Case is not Closed:
 - Change Parent case status to "Re-Open"
 - Post a message on Parent Case: "Parcel has been delivered - failed to RTO"
 - Status = Solved
 - Owner:
 - If scenario 1, set as Super Agent
 - If scenario 2, set as Previous agent.
 - ⊗ Else,
 - Outcome
 - Status = Solved
 - Owner:
 - If scenario 1, set as Super Agent
 - If scenario 2, set as Previous agent.

Figure D.28: RTO Requests v2 Process Documentation - twenty-third part

Escalate Case

- Post a message with the escalation reason
- Set:
 - ⊗ Owner = Previous queue
 - ⊗ Status = Reopen
- Ignore if Salesforce reverts this action.

Return Case

- Post a message with the return motive details
- Set:
 - ⊗ Owner = Previous queue
 - ⊗ Status = Reopen
 - ⊗ Ignore if Salesforce reverts this action.

Figure D.29: RTO Requests v2 Process Documentation - twenty-fourth part