



Save Time. Save Money.

30× Faster Reports With Zero Manual Work

From 90 minutes to 3 minutes:
standardized, auto-refreshed
dashboards delivered daily



INDUSTRY:

Logistics &
Transportation



LOCATION:

Hazlet, New Jersey, USA



SOLUTION:

AI-Powered
Intelligent Automation

CHALLENGE

Manual, repetitive reporting slowed decisions and created operational risk. Key reports (Commissions Report, Credit Analysis Report, Credit Limit Report) required 90 minutes, were dependent on the 5th Dimension Logistix Chief Operating Officer and Vice President of National Development, and reached stakeholders late in non-visual formats.

- 90 minutes dedicated every day to produce three daily routine reports.
- Report generation was dependent on the Chief Operating Officer and Vice President of National Development, and delivery was often delayed due to limited bandwidth.



WHO WE HELPED

5th Dimension Logistix is a family-owned logistics and transportation leader with 60+ power units, 4 terminals, and 300,000+ sq. ft. of TSA-certified warehousing supporting final-mile delivery, local cartage, warehousing, and specialized projects.



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MANAGING HIGHLY CRITICAL DAILY REPORTING AMONG SEVERAL WORKFLOWS & APPLICATIONS

The reporting process was so intricate that even the Chief Operating Officer and Vice President of Development took it upon themselves to manage and create it, safeguarding accuracy and trust. Still, manual data entry left room for inevitable human errors and delays.

- Workflows Across Disconnected & Disparate Systems
- Multiple Data Repositories / Different Systems of Record
- Fragmented technology infrastructure
- Cross-Functional Teams Juggling Siloed Systems
- **Several Manual & Error-Prone Processes**

Valenta's AI-Powered Intelligent Automation is platform-agnostic, seamlessly connects with over 200 business applications — from CRMs and ERPs to financial, HR, and business analytics systems — enabling end-to-end automation across your entire tech stack.



APPLICATIONS USED

IBM
AS/400



Power BI



BUSINESS PAIN POINTS

- Time-consuming report generation
- Inconsistent accuracy and formatting
- Limited visibility for stakeholders
- Operational risk from single-point dependency
- Inefficient, click-heavy workflow



PROCESS & AI-POWERED INTELLIGENT AUTOMATION

Valenta implemented an end-to-end, no-touch workflow. The Digital Assistant runs on a schedule, logs into source systems, and exports the required files. Then it removes unused columns, fixes formats (dates, numbers), applies business rules, and standardizes the layout.

Finally, the Digital Assistant publishes the prepared data to Power BI, where dashboards refresh automatically for stakeholders. All of these steps are automated and no manual intervention is required for routine runs.



Data Collection & Consolidation: Logs in, applies filters, and exports required files on a set schedule.



Standardization & Formatting: Removes unused columns, fixes formats, applies business rules, and standardizes layout.



Visual Dashboards: Publishes prepared data to Power BI; dashboards auto-refresh with KPIs and visual insights.



Delivery & Oversight: Sends run summary and dashboard link; provides clear traceability for stakeholders.

BUSINESS IMPACT

Automation improved reporting quality, reliability, and visibility across the organization, enabling faster, more confident decisions without redesigning upstream processes.

- Standardized, consistent reports
- Improved data accuracy and trust
- Faster decision-making with real-time KPIs
- Enhanced stakeholder visibility (self-serve dashboards)
- Reduced operational risk; scalable workflow

Zero Human Dependency on Routine Daily Reports

Fully automating routine reports means that the single-person bottleneck is eliminated.

RETURN ON INVESTMENT: 427%



\$63,297 Saved Annually



30× Faster Reporting

90 min → 3 min per daily run



13 Work Weeks Saved Annually

For the Chief Operating Officer and Vice President of Development



Payback Period

Within 3 weeks after implementation, validation, and go-live assurance phase