

CUSTOMER STORY

Travel agency automates sales reporting across multiple countries

800+

agencies receive
automated reports

150+

data
suppliers

70%

less time spent
on manual work

The customer

The customer is a global travel group with over 800 member agencies across North America and Australia. They offer tailored vacation products supported by data-driven marketing initiatives. Their value proposition includes a combination of digital tools, advisory support, skill development programs, and networking forums — all designed to help partner agencies enhance service delivery and customer engagement.



Challenge:

inflexible reporting system

Producing monthly sales reports for members using data from over 150 suppliers—including airlines, cruise lines, and more—was a highly manual and time-consuming undertaking. The process involved complex rules to match sales to individual members, often requiring significant effort and oversight. Reporting capabilities were tightly bound to a rigid CRM system, making it difficult to respond to changing business needs or introduce any level of flexibility. This hindered the ability to adapt or innovate quickly.

Compounding the challenge was the lack of visibility and control over the data. Validation and exception handling were limited, meaning errors could easily go undetected. Additionally, the data wasn't structured in a way that supported effective MIS (Management Information System) reporting. As a result, generating insights and drawing meaningful conclusions from the reports was both inefficient and unreliable. This environment made it clear that a more modern, automated, and adaptable solution was needed to meet reporting demands at scale.



Solution:

automated reporting

The global travel group implemented Solvexia to overhaul their monthly sales reporting process, transforming a previously manual, time-consuming workflow into a streamlined, automated solution. By adopting Solvexia, they were able to automate the collection and validation of data from over 150 suppliers, accurately match transactions to individual members based on configurable rules, and seamlessly distribute sales reports on a recurring basis.

With Solvexia's "automated matching" feature—driven by user-defined rules—the team gained the ability to process large volumes of data quickly and with precision. Unlike rigid CRM systems, Solvexia offered a flexible environment powered by SQL, giving users full control over queries and logic. The platform delivered complete visibility into data flows, mappings, and calculation rules, enabling transparency at every step.

Monthly revenue data is now stored in structured tables optimized for MIS reporting, while added features like supplier-level matching status tracking and rule-level drill-downs provide the control and auditability the travel group needed. Overrides can also be applied with ease, ensuring the system adapts to edge cases without compromising accuracy or speed.

Results:

team-led automation

By leveraging Solvexia's automation platform, the global travel group has empowered their in-house team to take full ownership of reporting and data analysis. Staff are now able to build and manage new processes independently, eliminating the need for ongoing external support and fostering a culture of self-sufficiency. The implementation has delivered significant time savings—thanks to automated matching and the ability to easily re-run data loading processes when needed.

The automated solution supports operations across the USA, Canada, and Australia, and successfully distributes sales reports to approximately 800 members on a monthly basis. The initial deployment was completed in just three months, with further phases underway to capture additional data sources and extend the platform's capabilities. Beyond reporting, the captured sales data is now being repurposed for other critical functions, such as calculating commissions, further enhancing the value of the automation investment.

About Solvexia

Solvexia is a low-code platform that automates spreadsheet-driven data preparation and manual processes. It enables finance to free up their time by running processes 100x faster with 98% fewer errors, allowing businesses to reallocate essential resources to value-added work.

Finance and accounting teams choose Solvexia to unify data from systems and spreadsheets and automate their processes without involvement from IT. Its drag-and-drop interface makes it fast to deploy and easy to learn. Solvexia combines and manipulates data, performs calculations and creates interactive reports, analytics and smart dashboards for richer insights for your stakeholders.

You can leverage Solvexia to automate hundreds of processes for your company, including reconciliations, revenue and expense reporting, regulatory compliance, rebate management and much more.