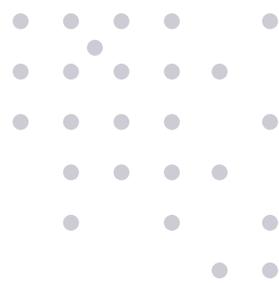




SPM Oil & Gas Cuts \$4M in Pending Invoices with SourceDay

SPM™ Oil & Gas
A Caterpillar Company





KEY RESULTS

\$6M → \$2M

Reduction In Pending Invoices Through
Cleaner PO Data

90-95%

Of Direct Suppliers Active On SourceDay

22-week

Lead Times Managed With Proactive
Supplier Collaboration

Seamless

Integration With Infor CloudSuite Industrial
(SyteLine) For Real-Time PO Updates

**“It saves you time, it saves you money.
You have all the data right there. Now it's
the first thing I show some of our buyers.”**

JESSICA ROSS

PURCHASING SUPERVISOR, SPM OIL & GAS

SPM™ Oil & Gas
A Caterpillar Company



SourceDay



CASE STUDY: **SPM OIL & GAS**

The Customer

SPM Oil & Gas operates in one of the most volatile supply environments in manufacturing. Demand can surge one day and collapse the next, leaving buyers to juggle thousands of purchase orders and components with lead times stretching past 22 weeks.

Jessica Ross, who has been with SPM for more than 15 years, has seen how unpredictable demand, inaccurate data, and manual communication can derail even the best-run procurement teams. To gain control, SPM adopted **SourceDay's PO Collaboration platform integrated with Infor CloudSuite Industrial (SyteLine)**.

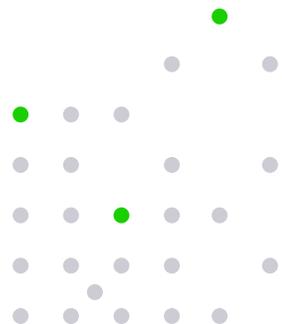


The Challenge

For years, SPM's procurement team wrestled with the realities of an unpredictable market using outdated, manual processes. Buyers relied on email chains, spreadsheets, and phone calls to manage thousands of purchase orders across hundreds of suppliers. Critical details slipped through the cracks, supplier responses often came too late, and the company's ERP data lagged behind reality.

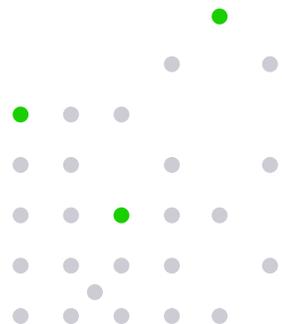
The result was a procurement process riddled with risk – from missed deliveries and expediting costs to delayed supplier payments and strained customer relationships. As Jessica Ross put it, buyers spent their days buried in clerical tasks and chasing updates instead of focusing on strategic work.

- **Purchase orders were frequently lost or delayed.** Orders sent by email sometimes landed in inboxes of supplier contacts who had already left the company. “That pit in your stomach when the vendor says, ‘what are you talking about?’” Ross recalled, describing how one lost order could trigger expedite fees or a **22-week delay**.



The Challenge (Continued)

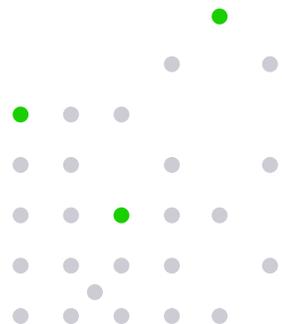
- **Buyers were overloaded with clerical work**, as constant forecast shifts forced them to move dates in and out each day, consuming hours on transactional updates that added no strategic value.
- **Customer commitments were at risk**, because in oil and gas, missed availability meant customers moved on.
- **Accounts payable backlogs grew unchecked**, as strict invoice matching caused pricing discrepancies to stall payments. Unpaid vouchers climbed to \$6 million, frustrating suppliers and increasing the risk of credit holds.
- **Forecast swings drove excess cost**, leaving suppliers holding forged parts or raw materials SPM no longer needed and forcing buyers into storage fees, holding charges, or year-end inventory tax impacts.



The Solution

SPM turned to **SourceDay's PO Collaboration** platform to bring discipline, visibility, and automation into its procurement process.

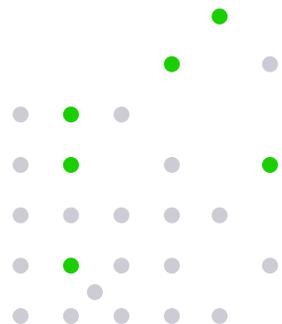
- **PO updates flowed directly into Infor SyteLine**, replacing manual updates and keeping buyers, production, and AP aligned. A new proposed date or price can be reviewed and approved and automatically synced to the ERP in minutes.
- **Supplier participation reached 90–95%**, driven by the option to collaborate through email or the portal.
- **Buyers shifted to exception-based work**, reviewing only at-risk POs instead of every order line.
- **PO actions became fully auditable**, with every acknowledgment, change, and response logged and time-stamped so supervisors had clear visibility and coverage when buyers were out of the office.
- **Buyers gained earlier visibility** into part-level cost and shipment risk, using Item Performance to track on-time delivery and cost trends. Connecting PO lines to advanced shipment notices lets buyers monitor overseas orders before they reached the dock.



The Results

With SourceDay in place, SPM transformed procurement from reactive firefighting to predictable control:

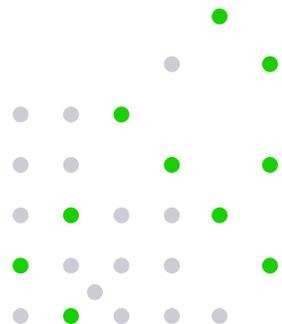
- **\$4M fewer pending invoices.** Clean PO data reduced the AP backlog from **\$6M to \$2M**, ensuring suppliers are paid on time and keeping the company off credit hold.
- **Near-universal supplier participation.** By giving suppliers the choice to interact through the portal or directly via email, adoption reached 90–95% of direct suppliers.
- **Predictable performance despite 22-week lead times.** Buyers gain early visibility into supplier changes and shipment updates, reducing the risk of costly surprises.
- **Time saved across the procurement team.** Buyers no longer spent hours moving dates or chasing acknowledgments and instead focused on managing exceptions and resolving real issues before they hit production.
- **Accurate information shared across the business.** Automatic updates flowed directly into SyteLine, allowing buyers, production schedulers, finance and sales teams to work from correct dates and prices instead of outdated information.



The Takeaway

By connecting SourceDay directly into Infor SyteLine, SPM Oil & Gas replaced manual processes with real-time, AI-powered collaboration. Buyers saved hours each week, suppliers were paid faster, and the business reduced risk despite 22-week lead times and extreme demand swings.

Ross admits she was skeptical at first: change sounded hard. But she quickly found the platform intuitive and effective, noting that SourceDay saves time, cuts stress, and gives the whole business the information it needs in real time.



The #1 Supplier Portal Trusted by Leading ERPs

SourceDay is an AI-driven supplier portal purpose-built to help executives eliminate risk and inefficiency from purchase order lifecycle management. The platform uses patent-pending artificial intelligence and machine learning to deliver real-time visibility, predictive risk detection, and automated workflows—empowering leaders to drive supply reliability and efficient growth. SourceDay connects seamlessly with any ERP, centralizing purchase order data and automating manual tasks to improve accuracy and reduce errors. Executives benefit from measurable improvements in on-time delivery, buffer stock, invoice processing, and supplier reliability. The platform enables supply chain, operations, and finance leaders to reduce costs, protect revenue, and scale their business with resilience to supply chain disruption.



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