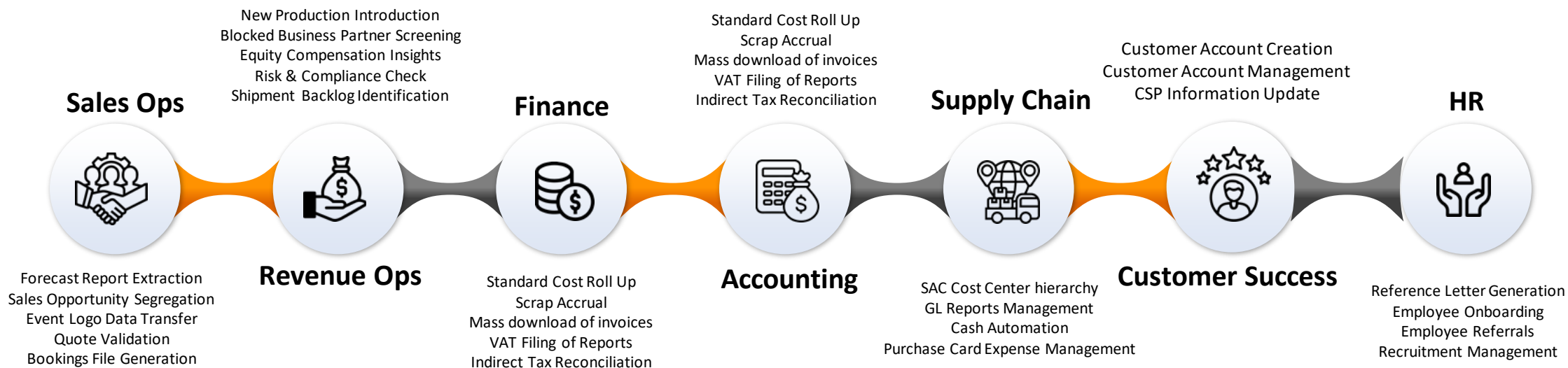




Φ iOPEX [Experience Engineering][∞]
TECHNOLOGIES

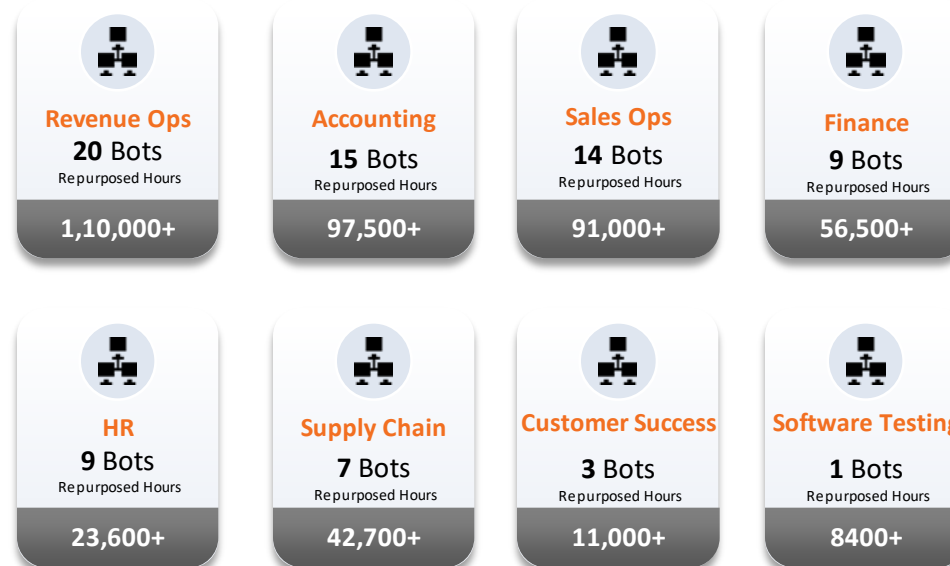
iOPEX's Processes of Excellence for the Global Cybersecurity Leader

Top Processes Automated Across Business Functions

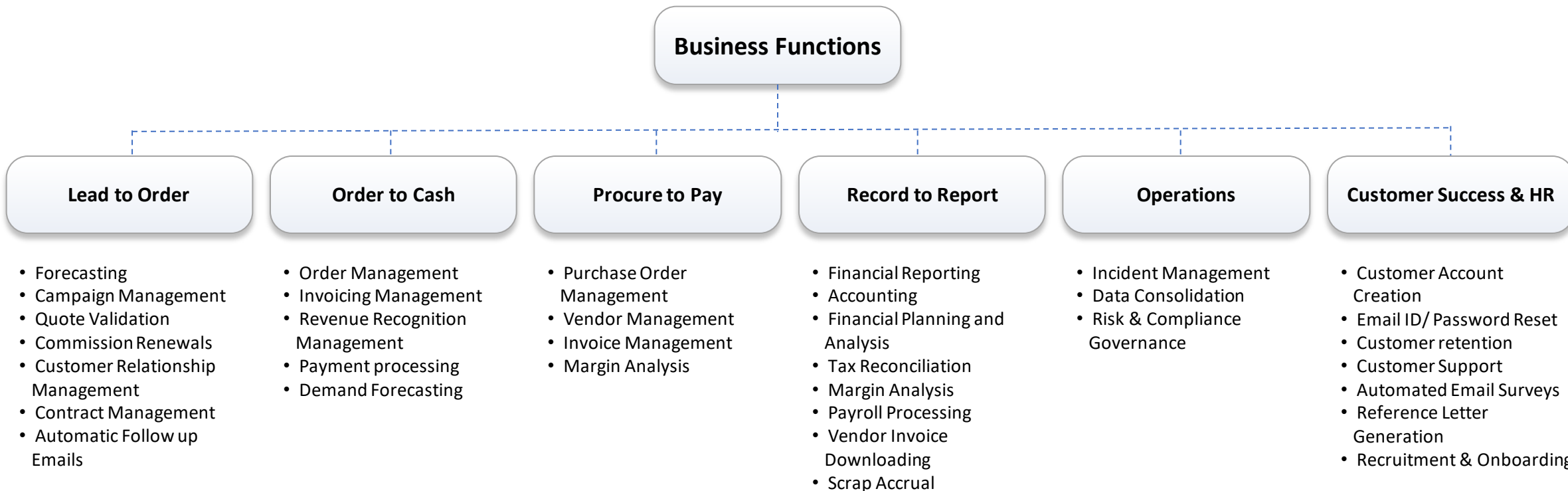


- 2 Million + Transactions Processed
- 77+ Processes Automated
- Enabled ~70% Touchless Transactions

 **Enterprise License utilized to the fullest**



Business Function Areas of Our Client



Applications Accessed by the BOTs



Sales Ops Processes Automated



Data Extraction & Management

Forecast Report Extraction

Automated report extraction from Sales Forecasting Tool (Clarizen) to reduce & repurpose manual efforts.

Customer Relationship Optimization

Generation of upsell reports, Enterprise Agreement reports, and refresh reports to get comprehensive data on customer engagement, potential upsell opportunities, and areas for contract renewal or improvement.

Compliance Report Generation

Extracting field values (Company Name, Country) from CRM and checking them against US government-sanctioned lists (The MK Denial and OFAC lists) for Compliance Check.

Sales Opportunity Segregation

Downloading sales opportunity reports from CRM on a time-to-time basis based on the Sales Stage every opportunity has been transitioned to.

CPQ Quote Validations

Seamless integration of Salesforce CRM with ERP system to validate and publish the Quote Information.

Bookings Files Generation

Region-wise sales performance report extraction from CRM/Market Place to enable informed business decisions.

Event Log Data Transfer

Archiving of event log data from Salesforce Einstein AI Platform to Salesforce dataset to **centralize data storage**.

Deal Desk Quote Approval

Simplification of approval process of Opportunities/Quotes in SFDC to eliminate the need for multiple manual approvals.

Applications Accessed by the bot



 Transaction Line  Report Based

Sales Ops Processes Automated



User Management

Salesforce Territory Management

Adjusting territory assignments for sales representatives based on their skills and experience using the insights provided by Cortex AI Platform.

User & Territory Alignment

Standard User/Territory Field Information Alignment from one System of Record to the other. (Anaplan to SFDC)

User Account Termination

Revoking the user's access to previously assigned applications, releasing all assigned licenses, and freezing the user's account in CRM.

Customer Account Match & Merge

Newly created customer accounts are matched with existing accounts in System of Records, based on predefined parameters and merged if a match is found.

Sales Hire - License Provisioning

Enabling Sales Tools license provisioning for New Sales Hires.

Commissions Management

Margin Analysis

Quote information extracted from Salesforce for every Quarter undergoes margin and revenue analysis, to enable informed decision-making by the business.

Booking SOX Reconciliation

Extraction of financial data from different applications such as Accounting GCP, SFDC and Tableau to identify discrepancies with application screenshots.

Data Sync for Sales Insights

Data Synchronization from SPM Software with the Sales Insights Tool to ensure accurate recording of critical sales performance, commission and incentive data.

Applications Accessed by the bot



Revenue Operations Processes Automated



Revenue Reports Management

Revenue Reports Download

Streamlining Revenue Team efforts by enabling automatic retrieval of revenue report attachments for multiple opportunity IDs in CRM, storing them with predefined names in a common repository and moving them to a shared drive.



Revenue Contract Modifications

Consolidating financial reports and including information on deferred revenue to facilitate the necessary adjustments in the Financial Statements.



SAP Reporting And Download

Financial Statements Revenue Reports Download on a time-to-time basis.



Linkage Check

Accurate revenue recording, identifying & investigating exceptions where sales orders are not linked to the right RAC.



Key Revenue Report

Generate Revenue close reports from Tableau Production after system freeze on the first day of every month for monthly revenue close tasks.



AWS Revenue and Disbursement

Preparation of linkage check reports between accounting software data and the AWS ZRAR report to ensure the financial data is accurate and consistent



Configuration Bill of Materials (CBOM)

This Automation facilitates cost management and pricing strategies by identifying purchased items with missing costs in NPI CBOM and ensuring accurate cost data for all components.



Revenue Operations Processes Automated



New Product Introduction

Allocation Report Testing

Allocation report testing performer retrieves transactions, downloads reports from Tableau and SAP, moves them to testing template, applies formulas and adds screenshots and uploads output to Google Drive.

Revenue Contract Modifications

Automates the audit documentation of the NPI tests performed by the revenue team.

SAP Reporting And Download

The BOT automates extraction and consolidation of reports based on Sales Order and precheck values & triggers an email to the business with the consolidated output attached.

Applications Accessed by the bot



Financial Data Operations

Trade BOL Document Management

Automating the process of saving Trade BOL documents involves extracting them from emails and storing them in a centralized location in Google Drive, ensuring easy access and organization.

RAR updates on Contract

Updating of contract details, such as the SSP amount, start and end dates, and suspend posting, by reading an input file from email and updating the relevant fields in SAP's RAR module.

Applications Accessed by the bot



Revenue Operations Processes Automated



Compliance Management

Applications Accessed by the bot

Blocked Business Partners Screening

Screening of business partners against watchlists and sanctioned party listings to take necessary actions, including terminating or blocking relationships with high-risk partners.



Trade Flex-SAP Reconciliation

Comparing and reconciling data between the Trade Flex and SAP systems to ensure accuracy in financial reporting and regulatory compliance.



Risk and Compliance Check

Generating CMRT file after performing security compliance checks to ensure extraction and trade of minerals are compliant with international standards to promote responsible sourcing practices.



Entry Validation & Shipment Backlog Identification

Generating discrepancy report between the 'sold to business partner' and 'shipped to business partner' & reporting it to the business.



Equity Compensation Insights Automation

Automate equity compensation administration to improve compliance with regulatory requirements to gain insights into their equity compensation programs.



Risk Data File Automation

Optimization of product materials data reporting and verification process to enhance accuracy and efficiency for better compliance and risk management outcomes.



Finance & Tax Processes Automated



Key Functions

Standard Cost Roll up

Quarterly Update of Approved Prices in Purchase Information Record and Standard Cost Table. It is useful to maintain financial accuracy of inventory activities and COGS calculations.



Scrap Accrual

Generate Scrap accrual reports from the ERP system to track the cost of unused materials, identify areas for process improvement, and reduce manufacturing inefficiencies.



Sourcing projects/ Savings Form update

Automation to evaluate and update RFPs for sourcing projects and savings forms to maintain financial accuracy of procurement and supply chain.



Automated Emails for "Not Yet Received at Failure Analysis site

Automate tracking and expedite routing of RMAs on customer escalation cases by triggering exception email notifications to specific teams for each RMA return status update to improve reporting timeliness and return expediting effectiveness.



Mass Download of vendor Invoices

Download and distribution of vendor invoices from the ERP system for external reporting purposes enabling timely and accurate reporting while reducing the need for manual intervention.



Tax Report Generation

Generate sales tax reports by extracting data from the ERP system and distributing it to a limited audience to improve the accuracy and timeliness of sales tax reporting.



VAT Filing of Reports

Automating the process of preparing and filing VAT reports for specific Geos.



Indirect Tax Reconciliation

Automate the process of generating GL Account and Financial Statement reports from SAP for each group based on defined criteria such as company code and fiscal year



Accounting Processes Automated



Accounting Key Functions

Applications Accessed by the bot

Demo Clearance
Expense vs Capitalization

Asset classification of internal sales transactions based on the unit cost (less/greater than \$3K) during balance sheet generation



General Ledger Reports distribution

Extraction & Consolidation of GL Reports from ERP system to check against SOX compliance with the company's financial regulations.



Cash Automation

Log the Financial Transaction onto the ERP system by creating Journal Entry files to ensure Financial statements accurately reflect the Financial position of the company.



Cost center creation

Cost Centre Creation/Modification in the ERP System to generate reports which provides a mechanism for tracking and controlling costs associated with different functions/regions of an organization.



Fixed Asset Roll Forward
Management

Downloading of Financial statements, Asset Balances, Acquisition reports, Asset Retirements, All FAS reports from ERP system and storing it in a centralized location to bring transparency between Finance, Operations & Accounting functions.



Accounting Processes Automated



Accounting Key Functions

Applications Accessed by the bot

PS Subledger reconciliation with Clarizen

Precise recording and reconciliation of financial transactions, covering revenue recognition, billing and expense allocation in both the PS Subledger & the Clarizen platform



Purchasing Card Expense Management

Automation of sending email reminders to employees who haven't submitted their Corporate Purchasing Card expenses by capturing all transactions from the HRMS tool.



Azure Forecast Report Standardization

Standardization of Cost Analysis reports for all the spendings by the organization to control and manage Azure Spending.



SAC Cost Center Hierarchy

SAC cost center hierarchy automation to manage 100+ cost centers across multiple regions. The implementation helped them generate financial reports and insights faster, identify cost-saving opportunities, and reduce the risk of errors and inconsistencies in their data.



EEO Reports Download

To automate the process of generating and downloading EEO (Equal Employment Opportunity) reports, ensuring timely compliance with government regulations, reducing the risk of fines or legal action.



Supply Chain Processes Automated



Procurement Ops

Dynamic Component Price list repository

A component price list auto-updated every quarter, made available to the procurement teams ensure accurate pricing of components.

Demand Forecasting

Component Demand Plan Forecasting Automation by interfacing CRM with Product Lifecycle Management Software.

Purchase Order Management

Automated closure of all purchase order line items upon completion of product delivery & payment to achieve **efficient and error free spend management.**

Automated Inventory Management

Automating the process of updating inventory whenever new purchase orders come in for real time visibility.

Component Supplier FTP Process

The email attachments containing component data sent by Sierra Wireless to a Distribution Center (Flex) are downloaded and stored on a common FTP server to ensure the best supply chain management practice.

Applications Accessed by the bot



Contract Management

Renewal Process Quote Validation

Comparing purchase orders against the contracts in the ERP system to enable quick and hassle-free renewals without any downtime.



Order Management

Smoothing the workflow from Order Placement to provisioning for both new Order & renewals.



HR Processes Automated



Key functions

Reference letter Generation

Fulfillment of employee reference letter request for VOE purposes by anonymizing the compensation information.

Employee Onboarding Management

Efficient Employee onboarding: Auto-capture of relevant employee details & necessary documents organized and fed into HRMS.

Employee Referral Automation

Streamlining Employee referral process by consolidating data from hiring tools & sending out automated emails with relevant information to referred candidates.

Recruitment Management Automation

End to end Interview related communication management to candidates & hiring panel.

Applications Accessed by the bot



Customer Success Processes Automated

Key Functions

Customer Account Creation

Attended automation for onboarding customers into CRM & Service delivery portals.

Customer Account Management

Creation of a case to change email ID or password in the CRM & Service delivery portals.

Customer Service Provider Information Update

Updating of Customer Service Provider data in CRM.





Φ

Thank
you