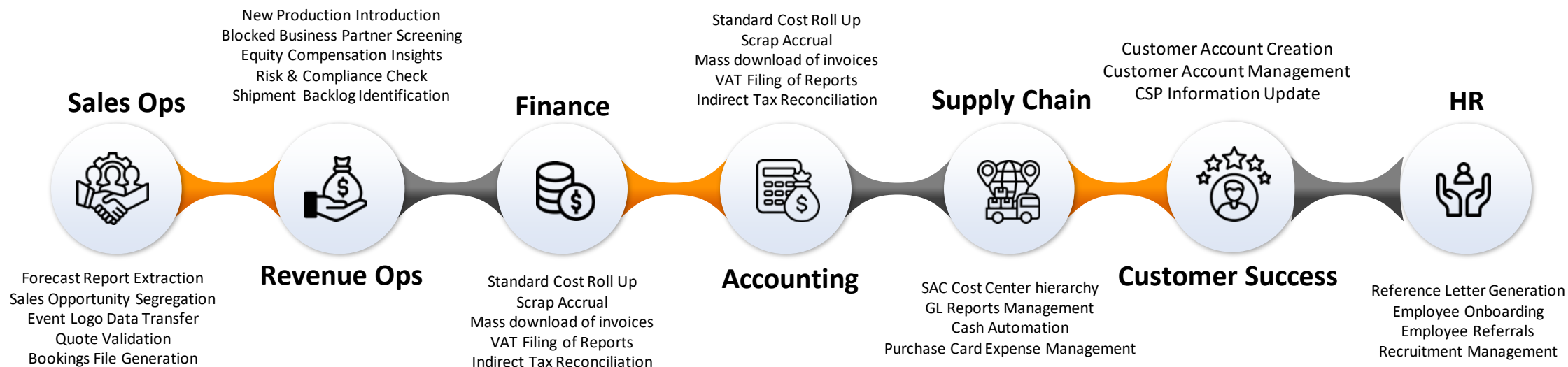# ΦiOPEX [Experience Engineering]∞ TECHNOLOGIES

iOPEX's Processes of Excellence for the Global Cybersecurity Leader

Top Processes Automated Across Business Functions

Sales Ops

New Production Introduction
Blocked Business Partner Screening
Equity Compensation Insights
Risk & Compliance Check
Shipment Backlog Identification

Finance

Standard Cost Roll Up
Scrap Accrual
Mass download of invoices
VAT Filing of Reports
Indirect Tax Reconciliation

Supply Chain

Customer Account Creation
Customer Account Management
CSP Information Update

HR

Forecast Report Extraction
Sales Opportunity Segregation
Event Logo Data Transfer
Quote Validation
Bookings File Generation

Revenue Ops

Standard Cost Roll Up
Scrap Accrual
Mass download of invoices
VAT Filing of Reports
Indirect Tax Reconciliation

Accounting

SAC Cost Center hierarchy
GL Reports Management
Cash Automation
Purchase Card Expense Management

Customer Success

Reference Letter Generation
Employee Onboarding
Employee Referrals
Recruitment Management

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

Enterprise License utilized to the fullest

Revenue Ops	Accounting	Sales Ops	Finance
20 Bots	**15** Bots	**14** Bots	**9** Bots
Repurposed Hours	Repurposed Hours	Repurposed Hours	Repurposed Hours
1,10,000+	97,500+	91,000+	56,500+

HR	Supply Chain	Customer Success	Software Testing
9 Bots	**7** Bots	**3** Bots	**1** Bots
Repurposed Hours	Repurposed Hours	Repurposed Hours	Repurposed Hours
23,600+	42,700+	11,000+	8400+

Business Function Areas of Our Client

Business Functions

Lead to Order	Order to Cash	Procure to Pay	Record to Report	Operations	Customer Success & HR

Lead to Order
- Forecasting
- Campaign Management
- Quote Validation
- Commission Renewals
- Customer Relationship Management
- Contract Management
- Automatic Follow up Emails

Order to Cash
- Order Management
- Invoicing Management
- Revenue Recognition Management
- Payment processing
- Demand Forecasting

Procure to Pay
- Purchase Order Management
- Vendor Management
- Invoice Management
- Margin Analysis

Record to Report
- Financial Reporting
- Accounting
- Financial Planning and Analysis
- Tax Reconciliation
- Margin Analysis
- Payroll Processing
- Vendor Invoice Downloading
- Scrap Accrual

Operations
- Incident Management
- Data Consolidation
- Risk & Compliance Governance

Customer Success & HR
- Customer Account Creation
- Email ID/ Password Reset
- Customer retention
- Customer Support
- Automated Email Surveys
- Reference Letter Generation
- Recruitment & Onboarding

Applications Accessed by the BOTs

Sales Ops Processes Automated

Data Extraction & Management

Applications Accessed by the bot

Process	Description	
Forecast Report Extraction	Automated report extraction from Sales Forecasting Tool (Clarizen) to reduce & repurpose manual efforts.	clarizen, Outlook
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.	salesforce, hadoop, Google Drive
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.	salesforce, DESCARTES MK Denied Party Screening
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.	Excel, Gmail, Chrome, salesforce
CPQ Quote Validations	Seamless integration of Salesforce CRM with ERP system to validate and publish the Quote Information.	Excel, SAP, Gmail
Bookings Files Generation	Region-wise sales performance report extraction from CRM/Market Place to enable informed business decisions.	Google Drive, Excel, salesforce, Outlook
Event Log Data Transfer	Archiving of event log data from Salesforce Einstein AI Platform to Salesforce dataset to **centralize data storage.**	Excel, salesforce, einstein
Deal Desk Quote Approval	Simplification of approval process of Opportunities/Quotes in SFDC to eliminate the need for multiple manual approvals.	salesforce

Transaction Line   Report Based

Sales Ops Processes Automated

User Management

Applications Accessed by the bot

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.

Transaction Line   Report Based

Revenue Operations Processes Automated

Revenue Reports Management

Process	Description
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.

Transaction Line   Report Based

Revenue Operations Processes Automated

New Product Introduction

Applications Accessed by the bot

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.

Financial Data Operations

Applications Accessed by the bot

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.

Transaction Line   Report Based

Revenue Operations Processes Automated

Compliance Management

Applications Accessed by the bot

Process	Description
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.

Transaction Line   Report Based

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

Transaction Line   Report Based

Accounting Processes Automated

Φ

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.

Transaction Line   **Report Based**

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.

Transaction Line   Report Based

Supply Chain Processes Automated

Φ

Procurement Ops

Applications Accessed by the bot

Process	Description
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.

Contract Management

Process	Description
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	Smoothening the workflow from Order Placement to provisioning for both new Order & renewals.

Transaction Line   Report Based

HR Processes Automated

Key functions

Applications Accessed by the bot

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.

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.

Transaction Line   Report Based

Φ

Thank you!