



# From inefficient to innovative

Best practices

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# Simplify & delight: Under one roof

 appzen



# Where do you want to be?



# Consumer innovation

We see innovation everyday

Innovation for the consumer is continuous

Consumers embrace innovation

Innovation comes from feedback and continuously improving technologies





# The rise of transformation

## PwC CEO Survey

**22%** of CEOs believe their current business model will survive the decade

**83%** of top performing companies have changed their business model in last 3 years

**24%** have increased their investment in enterprise-wide transformation by more than **50%**

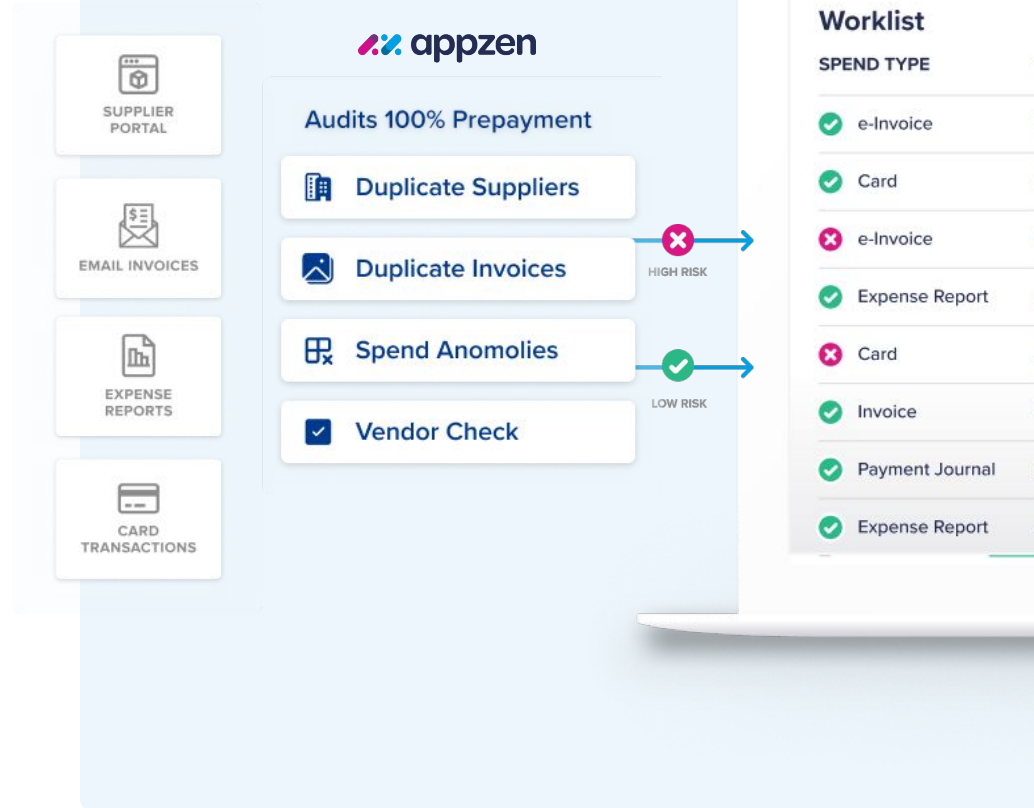


# Agenda

Mastermind audit models  
and self-service portal

Empowering managers:  
Team Intelligence

# Audit 100% of spend on invoices, expenses, and cards, prepayment



# Mastermind audit models & self-service portal

appzen





# Welcome to the world's first finance AI AppStore

Extend the power of AppZen Expense Audit  
to address your unique policy needs

STANDARD APP

## Rental Car Accessories

Identify car rental charges  
for unauthorized accessories

[See How >](#)

STANDARD APP

## Alcohol Check for Grants

Identify alcohol expenses  
tied to grant funding that  
forbids alcohol

[See How >](#)

STANDARD APP

## Allowable Alcohol Check

Audit meal expenses for  
percentage spent on alcohol

[See How >](#)

STANDARD APP

## Attendee Type Check

Flag excessive meal or  
entertainment expenses for  
specific categories of  
business guests

[See How >](#)

STANDARD APP

## Expense Sub-Type Check

Verify amounts by sub-  
expense types

[See How >](#)

STANDARD APP

## Missing Document Detection

Confirm the presence of  
missing documents, such as  
sign-in sheets

[See How >](#)

STANDARD APP

## Fapiao Validation

Confirm the presence of key  
fapiao fields and  
adherence to the standard  
fapiao format

[See How >](#)

STANDARD APP

## Keyword Audit

Check for high-risk keywords  
in expenses or receipt  
attachments

[See How >](#)

**Configure and Enable**

Organization

All Organizations



Policy

All Policies



Status



Active

[Save](#)

Keyword(s)\*

private healthcare ×

osteopath ×

amex late fees ×



chiropractor ×

tuition ×

covid ×

Expense Type(s)\*

all ×

Expense Type  
Exception(s)

Threshold Amount

Threshold Currency



Risk Score\*

High



# Edit Process

Name

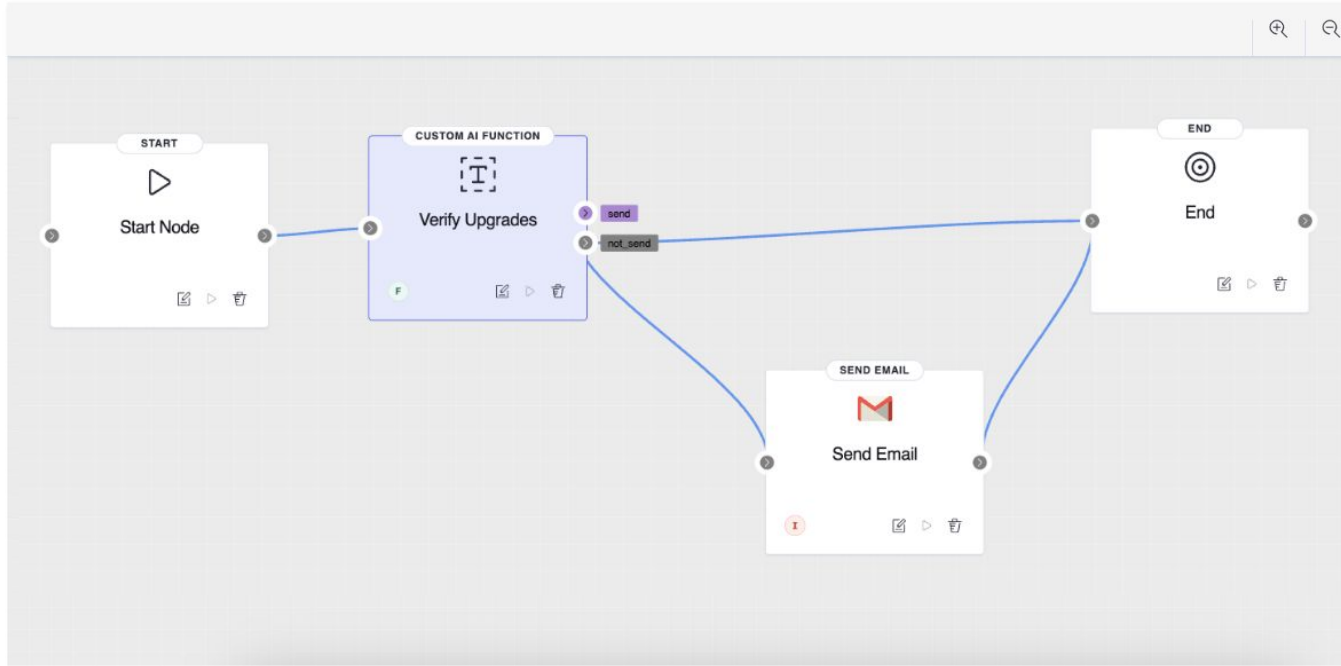
unauthorized Expense E

Description

Turing Expense Email

▶ Execute

📄 Save



## Take Actions

- Custom Action
- Invoice Outbound Workflow
- Image Conversion Workflow
- Web API
- Batch Web API
- Data Store
- Data File
- Line Basis Validation
- Batch S3 Download
- Batch S3 Upload
- Manual Action Start
- Manual Action End
- Send Slack
- Send Email
- Oracle
- Web RPA
- NetSuite
- Flag Risk
- Overwrite Risk

# Mastermind platform features in action

## Automated Report Rejection and Approval

Auto-reject report if the hotel itemization model flags due to missing receipt itemization.



## Value

495k expense reports/month

Amazon was looking for ways AppZen could do a universal automation

100% TPOS accuracy regardless of business unit/exceptions

*AppZen reduces auditor-employee feedback time and effort by automating rejection when the specific auditor response is certain.*

# Mastermind platform features in action

## Access to AppZen historic data

Detect spend on specific expense types over a certain period of time, compared to a certain allowable threshold.



## Access to report data

Allow employees to book first or business class flights only if the flight is booked through their company portal. The implemented validation overrides Unauthorized Expenses if the Boeing receipt is attached to the expense.





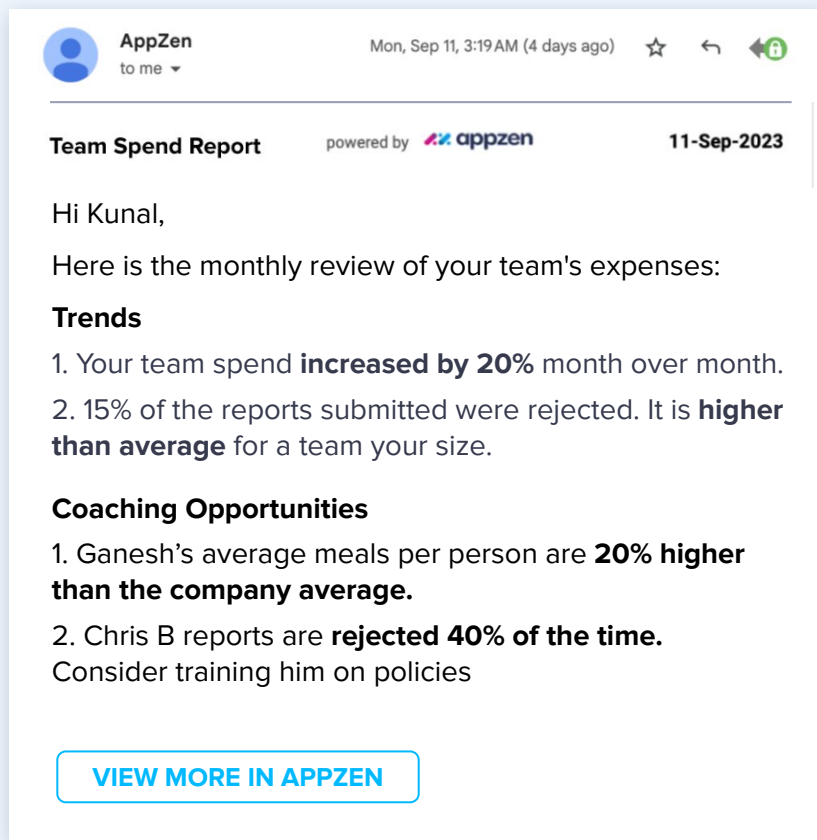
# Empowering managers: Team Intelligence

 appzen



# Sample email to manager

## Team Intelligence



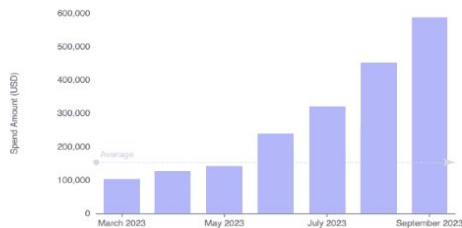


## Welcome



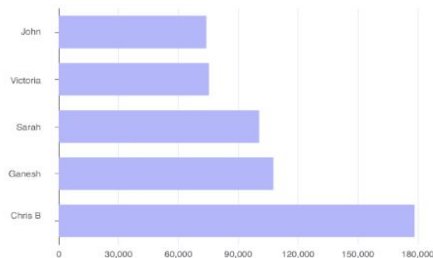
## Team Expense By Month

Filters Applied: "My Team", 04-Mar-2023 to 04-Sep-2023



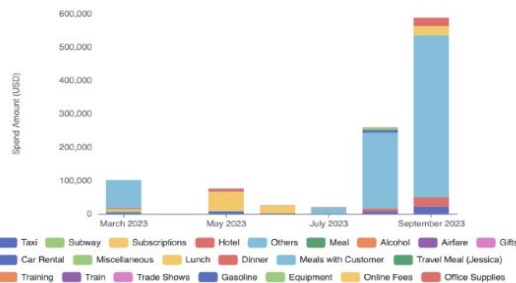
## Top Spenders in my team

Filters Applied: "My Team", 04-Mar-2023 to 04-Sep-2023



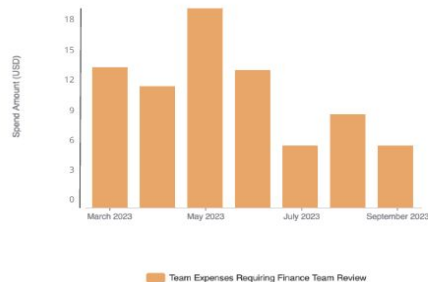
## My Team Expenses By Type

Filters Applied: "My Team", 04-Mar-2023 to 04-Sep-2023



## Team Expenses Requiring Finance Team Review

Filters Applied: "My Team", 04-Mar-2023 to 04-Sep-2023



## Welcome Kunal



## Trends

1. Your team spend **increased by 20%** month over month.
2. 15% of the reports submitted your were rejected. It is **higher than average** for a team your size.

## Coaching Opportunities

1. Ganesh's average meals per person are **20% higher than the company average**.
2. Chris B reports are **rejected 40% of the time**. Consider training him on policies

## You can ask any questions about your team:

Detailed monthly spend

Top Spenders

Chris B's rejected line item



# What's under your roof?

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