



# 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%**

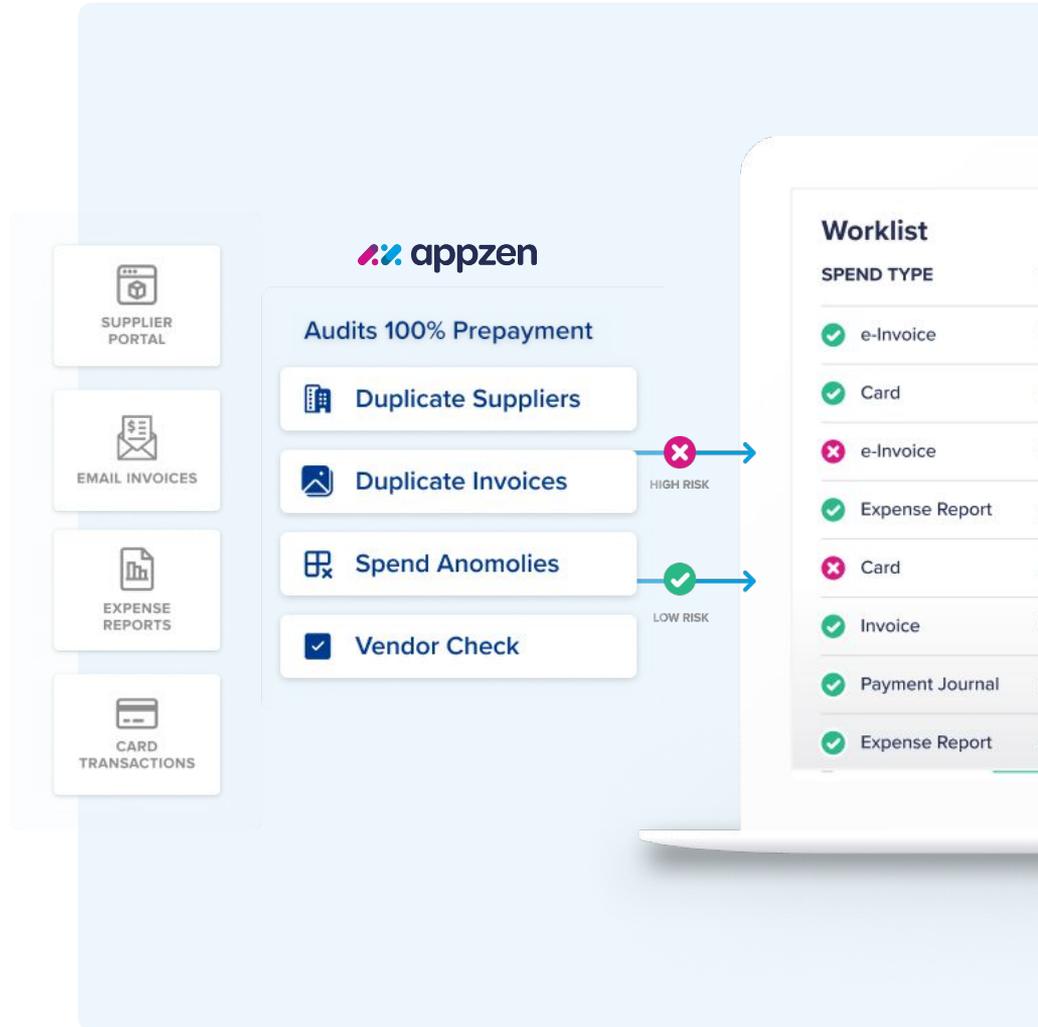


# Agenda

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

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# 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 >](#)

# Appstore - Keyword Audit

Public

EXPENSE AUDIT

Current Version - 1.0

## 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

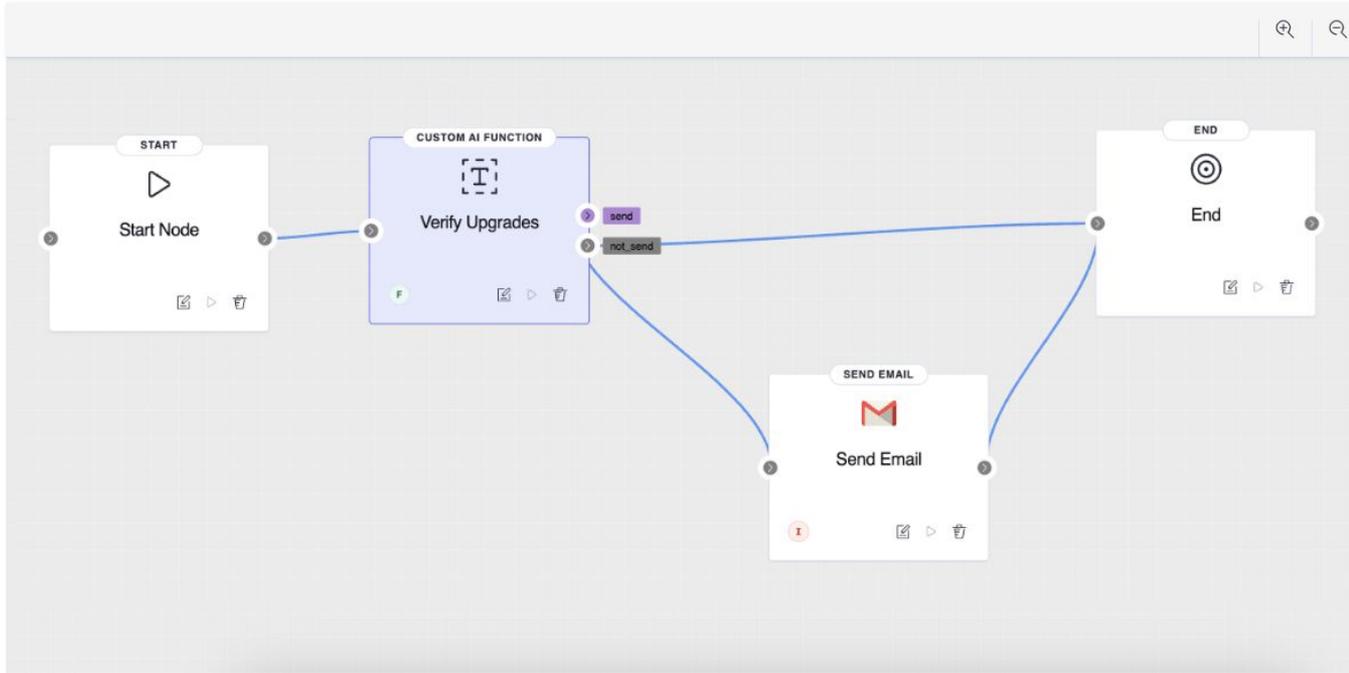
unauthorized Expense E

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 **I**
- 📧 Send Email **I**
- 🗨 Oracle **I**
- 🌐 Web RPA
- 📊 NetSuite **I**
- 😊 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

 **AppZen**  
to me ▾

Mon, Sep 11, 3:19 AM (4 days ago) ☆ ↶ ↷

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**Team Spend Report** powered by  **11-Sep-2023**

Hi Kunal,

Here is the monthly review of your team's expenses:

**Trends**

1. Your team spend **increased by 20%** month over month.
2. 15% of the reports submitted 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

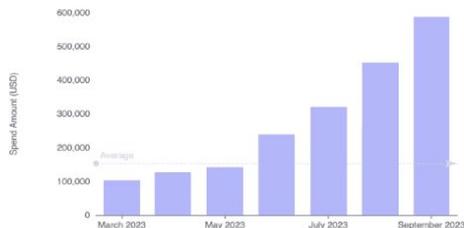
[VIEW MORE IN APPZEN](#)

Welcome



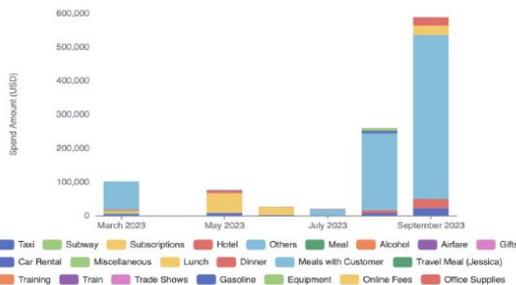
Team Expense By Month

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



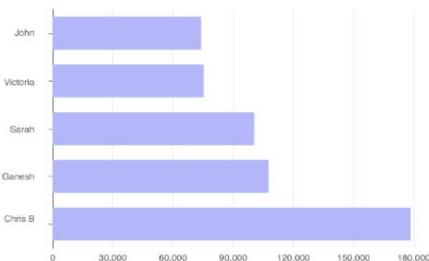
My Team Expenses By Type

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



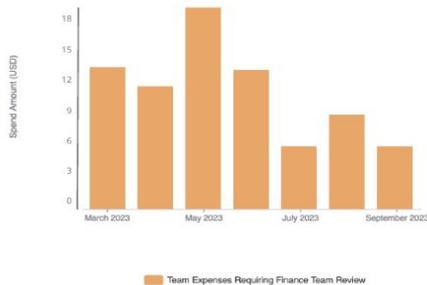
Top Spenders in my team

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

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

Coaching Opportunities

- Ganesh's average meals per person are **20% higher than the company average**.
- 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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