



Retail



Global

Fortune 100 Retailer Saves 89% Effort and 10K+ Hours with **AI-led Finance Process Automation**

The client, a global retail leader with extensive operations worldwide, sought to optimize its financial operations through digital transformation. Managing high transaction volumes across expense management and accounts payable processes was critical, but heavy reliance on manual interventions created bottlenecks. The client needed an automation-first approach to unlock speed, accuracy, and compliance without increasing operational overhead.

Highlights

- Finance operations were slowed by manual claims validation and invoice processing, leading to compliance risks, delayed vendor payments, and high operational costs.
- iOPEX implemented a comprehensive RPA solution using Microsoft Power Automate and AI Builder-led bots or multi-step automation, integrating ML models, intelligent document classification, and real-time analytics.
- The automation resulted in a 5X return on investment and saved over 2,800 work hours per month across two key finance functions.

Business Challenges

The finance function faced three core challenges:

Inefficient Expense Claim Processing:

Reviewing large volumes of data in Concur was challenging due to the unstructured nature of supporting documents. The manual process increased the likelihood of errors, while missing files frequently triggered audit flags and created significant compliance risks.

Manual Vendor Invoice Management:

As invoice volumes grew, scaling the process for managing vendor information from SAP became a challenge.

Limited Analytics Capabilities:

The existing processes provided only partial visibility into financial metrics. This limited the ability of teams to gain timely insights and take proactive decisions.

These challenges resulted in nearly 14,000 hours spent annually on repetitive, low-value tasks, increasing operational costs, and reducing overall efficiency.

iOPEX Solution

iOPEX designed a multi-bot automation strategy leveraging **Microsoft Power Automate, AI Builder, and Machine Learning** to transform the Finance LOB.

Key Initiatives

Expense Management Automation

- Multi-bot orchestration to classify, validate, and approve claims.
- ML-driven classification trained on 10K+ documents across 600+ templates for intelligent extraction.
- Human-in-the-loop intervention for exception handling, creating a feedback loop to strengthen the ML model.

Accounts Payable Automation

- Automated invoice extraction from SAP using dispatcher and performer bots.
- AI-Builder-driven data capture with validation against reports and real-time status updates.
- Seamless storage and reporting with Power BI dashboards providing full financial visibility.

Scalable Automation Framework

- Designed reusable automation components to enable future bot expansion.
- Established a **Robotic Operations Center** for hypercare, L1/L2 support, and continuous optimization.

Training and Enablement

- Comprehensive training programs for finance teams on the new automated workflows.
- Detailed documentation and knowledge transfer for ongoing support and maintenance.
- Process playbooks for handling exceptions and special scenarios.
- Post-implementation support to address questions and ensure a smooth transition.

The Impact

The implementation delivered substantial quantifiable benefits across multiple dimensions:

89%

Reduction in manual effort, with only 11% of claims requiring human review.

10,200+

Hours repurposed annually, freeing finance teams to focus on strategic initiatives.

300%

Processing speed increased, reducing turnaround from 2 days to just 8 minutes.

Zero Audit Flags

Since implementation, strengthening compliance and governance.

12%

Decrease in disputed claims, improving accuracy and stakeholder confidence.

90%

Invoice classification accuracy, ensuring minimal manual correction.

200%

Scalability in invoice processing without additional staffing.

₹1 Crore

Annual savings realized, achieving a 5X ROI within two years.



About iOPEX

iOPEX Technologies is a new-generation agentic AI and automation-led enterprise transformation solution provider headquartered in San Jose, California. At the intersection of enterprise operations, agentic AI, and intelligent automation, we deliver rapid results that enable businesses to enhance efficiency and accelerate revenue growth without endless timelines. Over 70 global brands trust iOPEX as a strategic partner to break down complex transformations into manageable steps, deliver practical AI-led solutions, and achieve results that scale. Contact us at marketing@iopex.com

