Automating Transaction Management

10xDS developed a comprehensive Transaction Management Tool using Microsoft Power Platform, designed to automate and streamline the funding or repatriation process between entities of a prominent Power & Utility Company in the Middle East.

BACKGROUND

The company's funding and repatriation processes between entities were previously managed through Excel files and PowerPoint presentations, shared across teams via email.

BUSINESS CHALLENGE

- The manual handling of transaction management through Excel and PowerPoint was time-consuming and inefficient.
- The use of email for sharing files led to frequent issues with outdated or incorrect information.
- The process lacked a standardized approach for documenting and managing step plans.
- Multiple teams working on different parts of the transaction process faced difficulties in collaborating effectively.
- Ensuring compliance with regulatory standards and maintaining data integrity was challenging without an automated system.

HOW 10xDS HELPED

Standardized Documentation: The tool standardizes the step plan documentation process, ensuring consistency and accuracy.

Search and Filter Capabilities: Users can search and filter transaction projects, making it easier to locate specific information.

Transaction Creation and Management: The tool allows for the creation of new transactions for different projects and provides detailed management of step-by-step plans for cash, accounting, and tax

Team Collaboration: Each team can work on their assigned step plans, with workflows ensuring sequential signoffs.

Document Handling: Capabilities for uploading multiple documents, updating notes, saving drafts, and finalizing step plans with a sign-off mechanism.

Automated Notifications: Notifications keep teams informed at each stage of the workflow.

Review and Validation: Users can review and validate step plans to ensure accuracy and compliance.

Reporting: The tool can generate consolidated reports for better oversight and management.

Access Control: Access controls ensure that only authorized team members can work on or view specific step plans.

VALUE CREATED

- Reduced time and effort required to manage funding and repatriation.
- Accurate and up-to-date data management.
- Increased compliance with regulatory standards.
- Effective Collaboration with clear workflows and automated notifications.
- Better oversight and security.

100%

Automated workflow

PURPLE PATCH

P&U

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