



ACBM Client Use Cases for Business Process Automation and Integration

Human Resources

- **BI Integration for HR**
Scheduled posting of new and updated employee information to external BI system.
- **Enrollment & Terminations**
Mass update enrollment date for eligible employee plans. Mass update pay status, termination date and change reason for employee that have been terminated.
- **Add/Update Master Records**
Close and Copy Position master records defined from Excel. Update Employee master and safety center records from Excel.

Sales & Customer Service

- **Add Configured Items on Sales Order**
Create a new data entry process for our Billing users that allowed them to add data onto the sales orders using the P3210 Configurator inside of the P4210 Sales Order Detail Revision program.
- **SO Approval**
Notification of Sales Orders placed on Price Threshold hold. Automate approval/review of Sales Orders from E-Mail.
- **CRM Integration**
Add/Update address book and customer master information from Salesforce.

Asset & Inventory Management

- **Update Advanced Pricing**
Mass update advanced pricing records from Excel.
- **OFSC Integration**
Real time bi-directional integration with Oracle field service cloud to manage fleet routing and improve customer communication.
- **Meter Readings**
Automate entry of PLC data from external database.



Real Estate Management

- **Add Unit Master Records**
Upload new unit master records from Excel.
- **Create/Update Recurring Billing**
Suspend existing recurring billing records and create new recurring billings records with an updated amount.
- **Upload AREF Expenses**
Upload AREF expenses from Excel.
- **Add/Update EP Adjustments**
Add or Update EP Adjustment, Cap Adjustment, or Other adjustments from Excel.

Accounts Payable

- **Create AP Vouchers and Payments**
Retrieve csv files from vendor FTP sites and create vouchers. Retrieve voucher information from FTP site and create/post payments with e-mail notification.

Banking / Financial

- **Bank Account Validation**
Real time validation of bank accounts using REST request.
- **Exchange Rates**
Automate retrieval and entry of daily exchange rates from Excel.
- **Update GL Accounts, Create Journal Entries, Retrieve Bank Entries, Update account master information from Excel.**
Upload month end journal entries from Excel. Retrieve daily bank account transactions and automate Journal Entries to record bank transfers between accounts.

Ready to explore your use case?

Contact us at (908) 464-5402 or email sales@acbmsolutions.com.