

Optimizing Revenue Management with Monthly Minimums Automation

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WHO WE ARE

“UB Technology Innovations is a Microsoft Power Platform delivery partner offering no/lowcode solutions, virtual bots, RPA, and data insights. We help clients on their digitalization journey by automating tasks, optimizing workflows, and providing a competitive edge through quick app deployment”

WHAT WE DO

- Compliance and Security
- Enhance Productivity
- Improve Time to Market
- Reduce Operational Costs
- Maximize Profits
- Customer Experience



THE CLIENT

Our client specializes in delivering essential components and supplies to various industries across multiple locations. With a diverse customer base and an extensive delivery network, they prioritize efficient revenue management and accurate invoicing processes to maintain profitability and customer satisfaction.



CHALLENGES

Our client faced several key challenges in managing revenue effectively:

- **Complex Billing Rules:** The client operated in a complex environment with varying billing rules based on customer contracts, delivery points, and regional regulations. Manual verification of monthly minimums against sales data led to frequent errors and disputes.
- **Inconsistent Billing:** Due to manual processes, invoices were generated incorrectly when sales did not meet the monthly target, causing discrepancies and customer dissatisfaction.
- **Scalability Issues:** As the client expanded operations and its customer base, managing monthly minimums manually became increasingly labor-intensive and prone to oversight, hindering scalability.
- **Audit and Compliance Concerns:** Ensuring compliance with regulatory requirements and maintaining audit trails for billing accuracy was challenging without automated checks and balances.
- **Lack of Real-time Visibility:** There was a need for real-time monitoring and reporting capabilities to promptly identify instances where sales did not meet minimum requirements.





SOLUTION

UB Technology Innovations implemented a standardized solution to these challenges using Microsoft Power Automate and Microsoft Power Apps. The solution included the following key components:

1. **Create Monthly Minimums:** Automated the creation of monthly minimums for delivery points using Power Apps, ensuring accuracy and consistency.
2. **Modify Monthly Minimums:** Implement an easy-to-use interface in Power Apps for modifying existing monthly minimums, reducing the time and effort required.
3. **Automation Implementation:** Integrate the automation solution with the existing ERP system to automatically fetch monthly minimums and compare them against actual sales figures.
4. **Customization for Flexibility:** Develop a solution that allows for dynamic adjustment of monthly minimums based on customer, location, and delivery point specifics, ensuring accuracy in billing.
5. **Real-time Alerts and Reporting:** Implement real-time notifications and reporting features to alert stakeholders when sales fall below minimum thresholds, enabling proactive management and resolution.



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SOLUTION BENEFITS

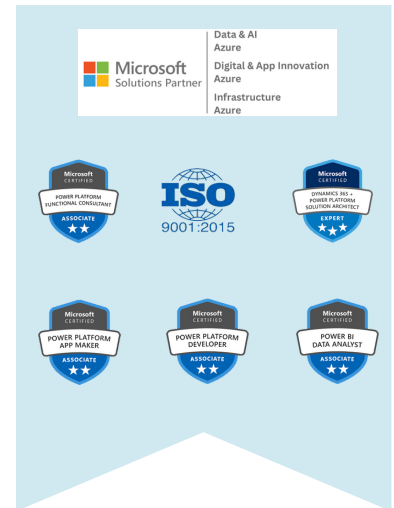
The implementation of the Power Apps and Power Automate solution delivered significant benefits to the organization:

- **Enhanced Accuracy:** Automation reduced human errors associated with manual data entry and calculation, ensuring that invoices reflect accurate sales figures.
- **Improved Efficiency:** Streamlined processes accelerated the billing cycle, improving cash flow and reducing the administrative burden.
- **Cost Savings:** By reducing manual intervention and operational inefficiencies, the client realized cost savings related to labor hours, dispute resolution, and potential penalties from billing inaccuracies.
- **Compliance and Audit Readiness:** Automated processes ensured adherence to regulatory requirements and facilitated easier audit trails, enhancing overall compliance and reducing audit-related risks.
- **Data Visibility:** Comprehensive reporting provided clear insights into sales performance against minimums, empowering decision-making and strategic planning.



ABOUT US

UB Technology Innovations, Inc. (UBTI) is a leading global technology solution provider with over 3 decades of experience across all industries, specializing in Capital Markets (Asset Management), Logistics, and Healthcare. We are the preferred Microsoft Solutions Partner backed by a world-class team of Microsoft Certified experts with rich experience in Azure Cloud Platform and Data Analytics.



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