

An IT Company Automated Its Travel Reimbursement Process With Microsoft Power Platform Solution



Learn how Damco automated and streamlined the travel claims reimbursement and management process using the Microsoft Power Platform

The Client Profile

The client is a renowned IT company with a global footprint in the USA, UK, Luxembourg, and India. It provides comprehensive software solutions for over 25 industries, catering to the technology needs of global enterprises, including Fortune 2000 enterprises.

The Challenge

The client's travel reimbursement and management process depended heavily on Excel spreadsheets, paperwork, and manual intervention, creating a lot of hassles for employees, travel team, and especially the accounts team. Some of the challenges are listed below:

- **Submitting Claims:** Using paper and Excel spreadsheets in travel and expense management caused unnecessary delays in processing, resulting in productivity loss.
- **Ink Fading:** As employees needed to submit bills & receipts as an evidence to support their reimbursement claims, the issue of ink fading made it challenging for them to provide clear and readable documents.
- **Scanning and Attaching Documents:** Scanning physical documents and uploading them via email and chat increased the time and effort required for employees, while also creating challenges for the accounting team to download and process claims.
- **Lack of Real-Time Tracking:** Reliance on email, chat, paperwork, and spreadsheets for tracking travel reimbursements made it difficult for all parties to monitor the status, causing significant challenges.
- **Loss of Productivity:** The time-consuming process further compounded the situation as it involved long email chains and queries, resulting in a loss of productivity.
- **Physical Documents Maintenance:** Maintaining hard copies of the receipts & invoices presented a significant challenge, increasing the risk of being misplaced, lost, or damaged.
- **Workload Surge:** Due to many employees submitting their travel expense claims at the end of the fiscal year, a sudden increase in workload occurred, which caused delay in the timely processing of invoices.



Lack of real-time tracking due to long email chains and paper-based processes



Increased risk of documents being misplaced due to reliance on physical documentation



Manual data entry, the issue of paper's readability due to fading ink, and verifying expense reports caused delays in timely processing of claims



Deluge of emails and verifying multiple accompanying documents resulted in the loss of productive hours for all stakeholders, especially the accounts team



Cumbersome process and inability to capture inaccuracies in expense reporting made it challenging for the finance team to ensure accurate and timely tax compliances

The Solution

Digitizing and automating end-to-end travel expense management process

■ **Mobile Application for Employees:**

With the mobile app developed by the Damco team, employees could capture images of bills and receipts instantly using their mobile camera.

■ **Web Applications for Various Departments:**

Damco team developed specialized web applications for the travel and finance departments, creating a unified portal for employee expense submissions, improving the efficacy of expense tracking & management process.

■ **Streamlined Expense Reporting Workflow With Power Automate:**

The expense reporting process was automated using Power Automate. Additionally, we established a more streamlined approval process for submitted invoices to ensure timely review and approval of submitted claims.

■ **Reduced Manual Data Entry With Azure Active Directory:**

Damco utilized Azure Active Directory to implement pre-filling forms with employee information, reducing the manual data entry requirement.

■ **Technology Stack:**

Microsoft Power Platform, such as Power Apps ,Power Automate, Microsoft Dataverse, and Azure Directory.

Value Delivered

Automating the reimbursement process with Power Apps to improve the overall efficiency and effectiveness of the travel reimbursement approval workflow

- ▶ Designed & developed user-friendly web and mobile interfaces, making it easier for employees to upload and submit documents.
- ▶ Simplified the claims submission process by allowing employees to instantly take photos of invoices and easily upload them on the app, eliminating the need for document scanning.
- ▶ Automated expense reporting, tracking, and reimbursement process, helping the finance team to close tasks more efficiently.
- ▶ Provided improved visibility and control over travel expenses, making it easy to track & manage expenses for the finance department. It also ensured compliance requirements are met.
- ▶ Automatic expense reporting allowed people to check the real-time status of submitted claims. They could see if their submitted claim is pending, in-progress, already approved, or if they needed to furnish more information.
- ▶ Reduced the claim approval time by 40%, significantly increasing employee satisfaction.



Learn how automating travel and expense management process can increase your productivity and ROI

Talk to Our Power Automate Experts

About Damco

Damco Solutions is a trusted technology and digital transformation partner for businesses around the globe. We engineer software products, create new digital experiences, modernize applications and automate business processes for greater agility and business growth. With 25+ years of leadership in software engineering and digital solutions, our mission has remained constant - complete client success.

For more information on Damco's Services, contact us:

+1 609 632 0350

info@damcogroup.com

<https://www.damcogroup.com/>