# AI-ENABLED TRAVEL & EXPENSE AUTOMATION FOR FOOD & BEVERAGE COMPANY

July 2025

**Client Background:**

A food & beverage leader struggled with manual travel and expense processes. Ulises implemented a Power Platform-based solution to digitize bookings, approvals, and reimbursements, reducing errors, ensuring compliance, and boosting efficiency.

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# USE CASES:
# AI-ENABLED TRAVEL & EXPENSE AUTOMATION FOR FOOD & BEVERAGE COMPANY

## RESULTS

Reduced manual effort in expense filing by ~60%

Faster processing and approval of travel requests (average turnaround reduced from 3 days to <1 day).

Improved compliance with travel policies due to rule-based validations.

Higher employee satisfaction with intuitive mobile UX and automation.

Enhanced visibility and reporting for finance and operations.

# ULISES DRIVES AUTOMATION FOR TRAVEL EXPENSES



## Simplify Operations

The Power Apps platform was selected for its tight integration with other Microsoft 365 tools, ability to leverage **Dataverse**, and low-code flexibility that supports both **standardized workflows** and **custom UI components**.

## Gained Operational & Strategic visibility

We achieved a live view of operations, identified bottlenecks early, and responded to market shifts with data-driven precision.

## Increased efficiency and productivity

We enabled OCR-based expense entry, enforced policies in real time, integrated booking systems, and secured documents via Dataverse.

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# AGILE BY DESIGN & MICROSOFT SUCCESS BY DESIGN
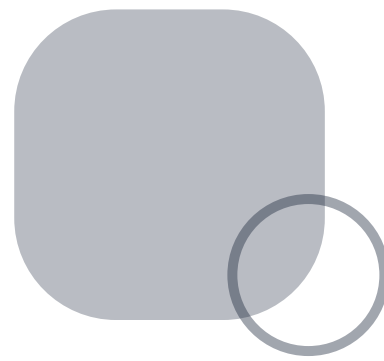
**01 Agile by Design:**

While fully iterative development isn't always suited for end-to-end commercial product implementations, we draw on agile practices that add real value—maintaining the right balance between defined requirements and development flexibility.

**02 Succes by Design (Microsoft):**

At Ulises, we apply Microsoft's Success by Design methodology to ensure the successful implementation of our solutions. By incorporating Success by Design, we ensure that every phase of your project, from planning to go-live, follows industry best practices around security, scalability, performance, and user adoption. Our regular design reviews and guided checkpoints help identify and mitigate risks early, reducing rework and accelerating delivery.

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# REQUIREMENT GATHERING

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## Engage with Stakeholders

Stakeholders management was a key success factor all along the project implementation, as stakeholders' workload peaks during this stage. We involved each key role at the right time for a specific topic, thus maximizing time efficiency and input quality.

## Identify Key Requirements

Through workshops and interviews, we extracted the critical needs that fueled operational efficiency. We clarified priorities and aligned expectations to ensure the new solution supports real goals.

## Document Business Processes

We created a clear and thorough map of existing workflows. This allowed teams to spot gaps and redundancies, setting the stage for improvement and long-term process efficiency.

# MODULES OVERVIEW-IMPLEMENTATION

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## Scalable Architecture & Enterprise Integration

We delivered a modular, scalable, and extensible solution built entirely on Microsoft Power Platform. This architecture enables seamless integration with enterprise systems, ensuring that the client can easily expand functionality as business needs evolve. Core components like Dataverse, Power App (Model-driven and Canvas), and Power Automate formed the backbone of a flexible system designed for longevity and adaptability

## Compliance-Ready & Future-Proof

By leveraging built-in governance, a customizable security module, and secure data handling practices, along with error monitoring implemented through a model-driven app and Dataverse, the solution meets strict compliance and audit requirements. AI-powered capabilities, custom connectors, and Power BI dashboards ensure the platform not only delivers operational efficiency today but is future-ready to support ongoing innovation and digital transformation across departments.
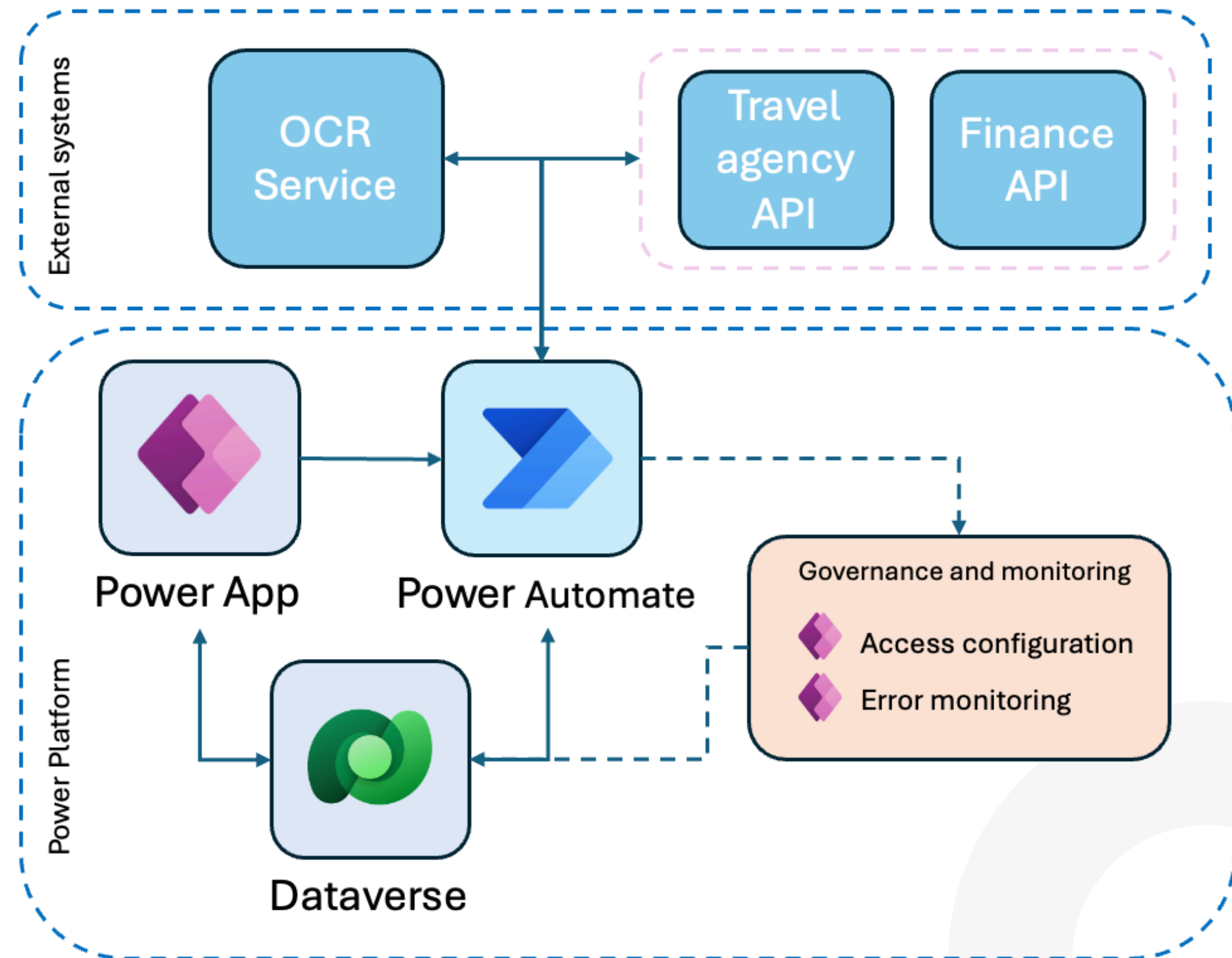
# TRANSITIONING TO THE NEW SYSTEM

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## Final Preparations for Go-Live

We ensured all components were fully configured and performed as expected before launch, while securing a smooth transition through successful adoption by internal teams.

## Training for End-Users

Tailored training sessions for users facilitate familiarity with new systems, ensuring they possess the skills required to leverage Dynamics 365 F&O capabilities effectively from day one.
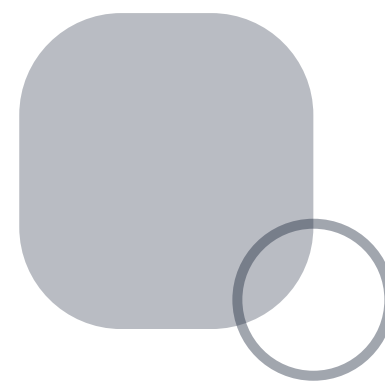
## Support and Troubleshooting

Dedicated support teams stand ready to address any challenges encountered during the go-live phase, ensuring a smooth transition and user confidence in the new system.

# CONCLUSION KEY TAKEAWAYS AND FUTURE STEPS

**01 Summary of Implementation Process:**
We combined canvas and model-driven apps to balance flexibility with control, aligned teams through upfront process mapping, fine-tuned OCR accuracy, and ensured smooth integration through tight collaboration with external travel providers.

**02 Next Steps for Continuous Improvement**
Valuable insights gained throughout the implementation process guide future endeavors, reinforcing the significance of stakeholder involvement and agile adjustments as key to success.

**03 Roadmap Definition:**
Our goal goes beyond successful implementation; we aim to become your reliable partner in developing long-term technological capabilities. After go-live, we provide a complimentary assessment roadmap outlining the next steps to help you become a technology leader in your sector by leveraging the latest IT trends and capability enablers.

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# THANK YOU

## FOR YOUR ATTENTION

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