

Approval Workflow Automation for Distributed, Multi-Location Enterprises

Clients: Three geographically distributed organizations

Industries: Commercial Real Estate, Laundry Services, Skilled Nursing

Solutions: Local-to-central approval workflows



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COMPOSED PROCESS SOLUTIONS

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Background

Geographically distributed enterprises - assisted living and skilled nursing facility operators, large manufacturers, and real estate management firms - operate across states, countries, and time zones. Accounting, HR, IT, and legal requests are often initiated and approved locally, then escalated to a central corporate office based on the type, amount, or circumstances of the request.

Many organizations struggle to automate these local-to-central approval workflows without producing fragmented, inconsistent automations, increased complexity, higher costs, and frustration for users and administrators.

Unlike other low-code platforms that treat each request process as unique and requiring separate development, Ultimus takes an enterprise view of approval workflows, pre-implementing their many commonalities to reduce unnecessary development and maintenance time and cost.

This approach allows distributed operations to quickly and cost-effectively eliminate the inefficiencies, miscommunication, delays, and errors inherent in high volume manual and partially automated processes, as well as to eliminate expensive, inflexible, and often redundant point solutions.

Case Study 1 – International Real Estate Management*

A large, international provider of commercial real estate management, leasing, and consulting services uses the Ultimus DPA Suite to automate a variety of high volume, mission critical accounting and operational processes such as new property acquisitions, lease approvals, cash receipt management, payment management, and funds transfers.

Today, the Company uses Ultimus to handle all financial transactions for their approximately 10,000 properties—processing up to 200,000 transactions per day. Some processes alone manage up to 6 million transactions annually, all powered by Ultimus.

Ultimus DPA Suite

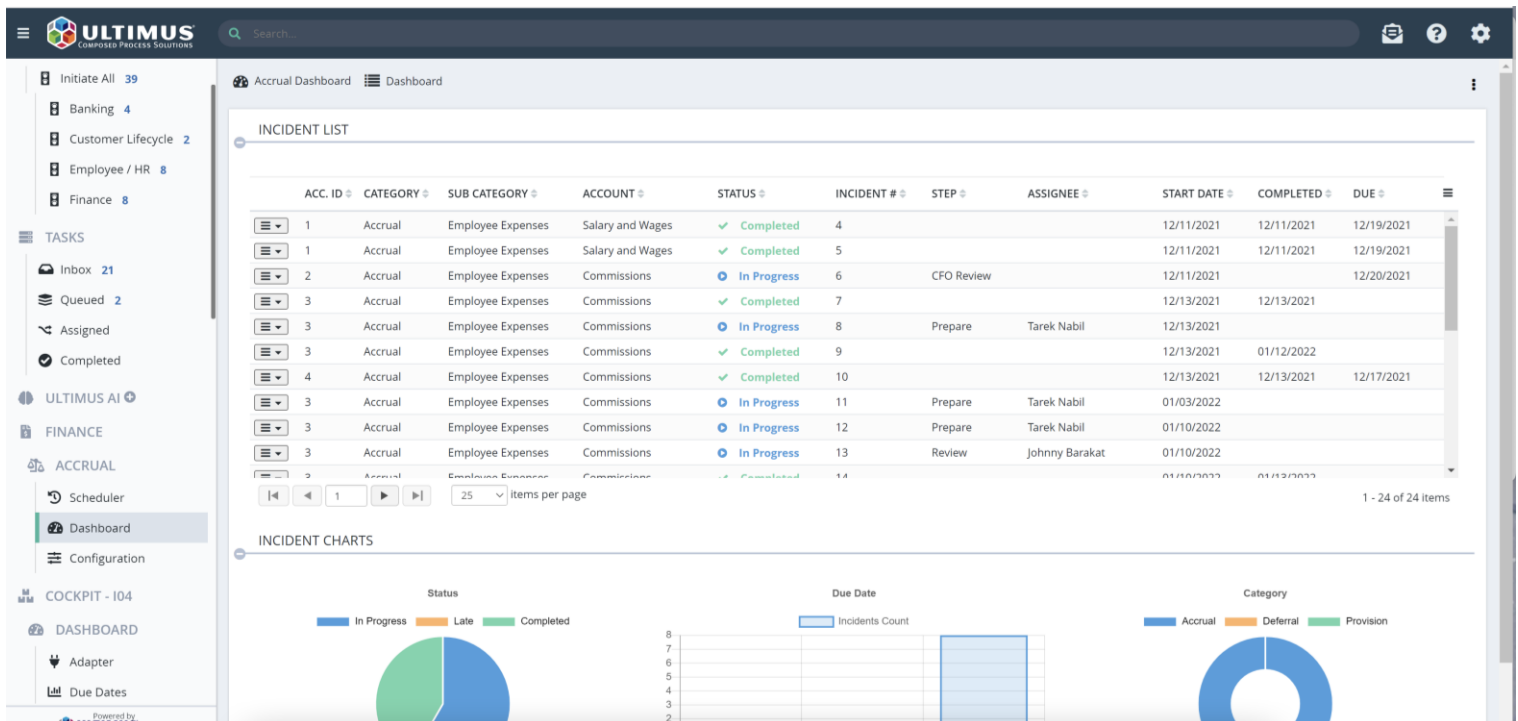
Ultimus Customer Case Studies

Case Study 2 – Commercial Laundry Services*

An operator of 78 commercial laundry and linen rental facilities across the U.S. and 11 countries uses Ultimus to automate key accounting and operational approval processes. These include asset disposition, accounts payable/invoice approvals, capital expenditures, expense reimbursements, new item requests, and supplier onboarding.

With workflow automation, AI-based data extraction and form population, and straight-through rule-based approvals, the Company has been able to complete these approvals with fewer and less skilled personnel and reduced the number of transactions audited from 100% to 60%.

They also used Ultimus' integrated AI to identify potential duplicate supplier tax payments and apply for refunds, recovering \$2 million in the first two months of production.



Ultimus accrual management dashboard.

Ultimus DPA Suite

Ultimus Customer Case Studies

Case Study 3 – Skilled Nursing Facility Operator*

A U.S.-based operator of over 250 skilled nursing, assisted living, and therapy facilities across 14 states uses Ultimus to automate more than 30 accounting processes. Within five months of completing Ultimus training, the company had already automated 14 of these processes, including refund and write-off approvals, journal entry approvals, monthly closings, and invoice approvals.

The Company reports a less than 3-month payback from their Ultimus investment through built-in Ultimus validation and error checking capabilities, elimination of process bottlenecks, visibility into write-off root causes, and elimination of duplicate and erroneous refunds.

The screenshot displays the Ultimus DPA Suite interface. The top navigation bar includes the Ultimus logo, a search bar, and utility icons. The left sidebar contains a navigation menu with categories: REQUESTS, TASKS (Inbox 13, Queued 3, Assigned, Completed 17), COCKPIT - I04, DASHBOARD (Adapter, Due Dates), REPORT (Invoices), CONFIGURATION (Approval Structure, E-Mail Launch, Rules), and DPA ADMINISTRATION (Processes). The main content area shows an expense report for 'Clara Parker' with tabs for REQUEST, EXPENSES, DOCUMENTS, VIOLATIONS (active), PROCESS, and HISTORY. The VIOLATIONS tab lists several issues:

- MISSING REQUESTER INFORMATION [1]**
 - Missing Required Information [Request / Overview / Reason for Travel]
- MISSING EXPENSES INFORMATION [2]**
 - Missing Required Information [Expenses / Expenses / Description / #1]
 - Missing Required Information [Expenses / Expenses / Currency / #2]
- MISSING DOCUMENTS INFORMATION [2]**
 - Document has not been verified 1 Meals | Lunch should be verified [Documents / Request Documents / 1 Meals | Lunch]
 - Missing Required Information [Documents / Request Documents / 2 Meals | Business Meals]
- OTHER VIOLATIONS [1]**
 - Daily Maximum Violation Expense Exceeds the Daily Maximum of \$500 for this category

A legend in the bottom right corner indicates the status of each violation: No Decision (red circle with exclamation mark), Deferred (yellow circle with exclamation mark), and Waived (green circle with exclamation mark).

Ultimus built-in validations, error checking, and end user help.

* Customer-specific information available upon request.



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