VEOTEQ
INTELLIGENT AUTOMATION

AI Use-Case Pack

Business processes VEOTEQ automates across the systems you already run, with people approving what matters.

FINANCE · ACCOUNTS PAYABLE · HR & PEOPLE OPERATIONS

Each use case shows the process today, the same process with VEOTEQ, the systems involved, and the controls built in. Demonstrations with sample, illustrative, or synthetic data; not client results. Workday, E*TRADE, NetSuite, Microsoft 365, Microsoft Outlook, Microsoft Teams, Power BI, and Okta are trademarks of their respective owners; VEOTEQ is not affiliated with or endorsed by them.

USE CASE · FINANCE & CFO OFFICE

Equity vesting reconciliation

Every vesting cycle, finance teams export employee data from the HR system, re-key it into the equity platform, copy results into the ledger, and check the math by hand. VEOTEQ connects the three systems, reconciles each vesting event, and drafts the entries for your team to approve.

Systems involved

Workday Employee and grant data	**E*TRADE** Vesting events and releases	**NetSuite** Journal entries	**VEOTEQ** Checks, dashboard, approval

Today

- CSV exports from the HR system, sent by email
- Data re-keyed into the equity platform
- Results copied into spreadsheets and the ledger
- Someone checks the math by hand

With VEOTEQ

- Schedule pulled from HR; each vest checked for date, vesting percentage, employment status, and remaining balance
- Mismatches flagged with the reason and the owner
- One dashboard for review and approval
- Vest triggered in the equity platform and balanced journal entries posted, with an audit trail

Controls built in

- Controller or stock plan administrator approves before anything reaches the ledger
- Every check, exception, decision, and entry logged with its source records
- Least-privilege connections inside your environment

> **Watch the demo:** veoteq.com/use-case-equity-vesting.html

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USE CASE · HR & PEOPLE OPERATIONS

Employee onboarding, ready on day one

A new hire accepts the offer and five teams start scrambling: HR, hardware, email, access, and the welcome kit. VEOTEQ validates every hire, puts HR in control of one approval, and sets up everything else before the first day.

Systems involved

Workday New hire becomes active	**Hardware vendor** Laptop ordered	**Microsoft 365 & Teams** Account and welcome	**Okta** Single sign-on

Today

- HR, IT, facilities, and managers each work from their own checklist
- Hardware, accounts, and access requested by email and tickets
- Errors in the hire record surface after equipment is ordered
- Day one: no laptop, no login

With VEOTEQ

- The workflow starts when Workday marks the hire active
- AI validates the hire record before anything is ordered
- HR approves on one dashboard
- Hardware, Microsoft 365 account, Okta access, and welcome package set up before day one

Controls built in

- Nothing is ordered or created until HR approves
- Accounts and single sign-on follow your role and access rules
- Every step logged

> **Watch the demo:** veoteq.com/use-case-employee-onboarding.html

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USE CASE · FINANCE & ACCOUNTS PAYABLE

Supplier invoice intelligence

A three-way match tells Accounts Payable that an invoice is $550 over its purchase order. It does not say why. VEOTEQ AI investigates across email, the ERP, and purchasing records, recommends an action with the evidence attached, and leaves the decision to the right person.

Systems involved

Outlook Invoice email and PDF	**NetSuite** PO, receipt, vendor bill	**Teams Approvals** Purchasing manager decides	**Power BI** Cycle time and exception causes

Today

- The three-way match flags the variance, but not the reason
- An analyst opens the email, invoice, PO, receipt, and purchasing emails
- About 12 minutes per invoice, 500 invoices a month (illustrative)
- An unexplained difference delays a payment, or makes a wrong one

With VEOTEQ

- AI reads the invoice and finds the PO, item receipt, and vendor bill
- Line-by-line comparison isolates one extra line: $550 freight
- Purchasing emails show the freight was discussed but never authorized
- A recommendation with linked evidence goes to the purchasing manager; on approval the PO is amended and the bill approved

Controls built in

- The AI never pays, rejects, or releases funds; a person decides and the decision is recorded
- Payment follows the same approvals and payment run
- A rejection triggers a request for a corrected invoice from the supplier

> **Watch the demo:** veoteq.com/use-case-supplier-invoice-intelligence.html

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HOW TO START

From one process to measured results

Every engagement starts small and ends each step with a decision. You move forward only when the evidence supports it.

STEP	WHAT HAPPENS	TIME
AI Fit Call	We talk through one process, your systems, and your controls, and tell you honestly whether AI fits.	30 minutes
AI Value Sprint	Process map, baseline, ROI assumptions, control requirements, pilot scope, and success measures.	Focused discovery
Outcome Pilot	One measurable outcome built on your systems, tested with people approving, ending in a go/no-go decision.	6–10 weeks
Managed AI Operations	Monitoring, controlled improvements, cost review, and monthly value reporting.	Ongoing

Why VEOTEQ

- **Technology and business operations expertise:** we understand both the systems and the work.
- **Provider-neutral:** we recommend what fits, and you own the accounts.
- **Senior and founder-led:** the person who scopes your work designs and builds it.
- **Controls by design:** human approval, least-privilege access, and an audit trail from day one.

More use cases

We add new demonstrations every month. See them all at veoteq.com/use-cases.html.

> **Book a 30-minute AI Fit Call** at veoteq.com, or email ssallam@veoteq.com.

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