FIVE Informatik AG: Process automation benefits small and medium-sized companies

Company Profile

FIVE Informatik AG was founded in 1988 and offers solutions for all IT and business requirements. FIVE acts as a provider, integrator and consultant of digitization solutions for process optimization and automation and optionally also provides IT operations with infrastructure and IT services. A partnership-based collaboration is maintained with over 1,500 customers.

Challenge

- Creation of a cost-effective process digitization solution for SMEs
- Automatic recognition of a wide range of documents
- Easy integration into customers' existing IT infrastructures
- Industry-specific focus (e.g. for insurance brokers)

Solution

- Model-driven Power App with Power Automate workflows for process automation
- Recognition and filing of documents through integration of Form Recognizer and SharePoint
- Dataverse (database) for persistence of master data and dynamic data exchange with existing third-party systems (CRM / ERP / archive / portal)
- Solution is scalable and can be deployed automatically (pipeline)

Benefit

- Great time savings and efficiency gains through process automation
- Increased quality and traceability across all work steps
- Fast and easy familiarization with the system, thanks to standardized processes
- Flexible and fast expandability of the solution with low-code/no-code

Technologies

- Power Apps
- Power Automate
- SharePoint
- Dataverse

FIVE Informatik AG is a software manufacturer with over 30 years of experience. With novaCapta, FIVE set out to implement its first solution based on the Microsoft Power platform. „We wanted to create a cost-effective solution for small to mid-sized companies that could be easily linked to existing CRM systems. Microsoft's low-code/no-code solution was the right fit for us, but also a new approach. We already knew novaCapta from previous projects. It was therefore obvious for us to request their expertise for this project as well," Christian Lory, Product Manager of FIVE Informatik AG, explains the project start. With „ONE", an initial solution was created that can be quickly embedded into existing and industry-specific infrastructures.

ONE Broker: Process automation on the example of insurance brokers

Broker receive enormous amounts of documents and information on a daily basis, which they have to consolidate, process, document and respond to. With ONE Broker, processing becomes more efficient as processes are automated with the Power Platform solution.
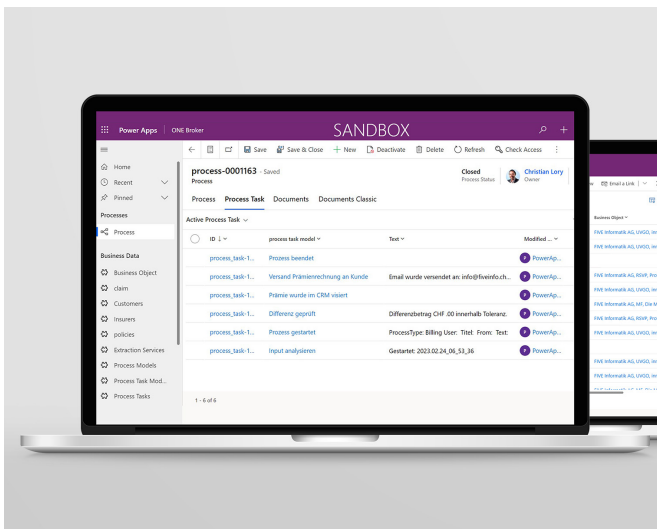
Power Apps & Power Automate in action

The Model-driven Power App accesses existing CRM systems via interfaces and pulls customer and contract data into the Dataverse database.

Die Sachbearbeitung kann so pendente, wie auch erledigte Aufträge einsehen und bearbeiten. Die Antworten und Entscheide bleiben als Prozessschritte nachvollziehbar. Ebenso stehen dank der SharePoint Integration die bearbeiteten und generierten Dokumente direkt zur Einsicht zur Verfügung. Folgende Prozesse veranschaulichen das Potenzial zur Entlastung in der Administration, so dass sich die Sachbearbeitung auf die Kernaufgaben konzentrieren kann.

• **Billing process:** ONE Broker checks for each incoming invoice whether the associated policy is known and the invoice amount is due. Then the invoice is automatically forwarded to the customer with a cover letter and marked as „checked" in the CRM.

• **Send process:** The automatic document dispatch reads the received document and forwards it automatically together with a customized cover letter to the end customer.

• **Post process:** The incoming mail item is digitized, read, assigned to a client and thereby results in a prepared pending item for the processing staff. They can then file the mail item, forward it, or use it to start another automated process.

Form Processing with the Azure Cognitive Service

To enable ONE to recognize and match all incoming documents, Azure Cognitive Service was used. Just a few sample documents were sufficient to train a wide range of input: from classic information documents to differ-

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ent invoices. This enables the solution to recognize the documents, classify them into the correct workflow, and launch the process.

ONE: a solution for everything with great potential

Thanks to the selected Microsoft architecture and tools, the solution can be easily expanded at any time to include additional processes as well as document types. Onboarding and updates are fully automated in the existing Microsoft cloud environment, where the solution is also operated.

The time savings for the users are enormous. With integrated history and document storage, processes remain transparent and traceable at all times. ONE: A solution for industry-specific digitization in a complex environment of small companies.

> " Projects involving new technology require foresight in terms of development, operation and scaling. novaCapta successfully built an appropriate architecture with its Power products. Today we are able to provide digitalization, despite complexity, to small businesses. "

Christian Lory - Product Manager, FIVE Informatik AG

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