



# Digital Modernization with Business Rules and Workflow

## **Automate Anything. Change EVERYTHING!**

March 28, 2023

# Agenda



01

**Overview**  
15 Minutes

02

**D4SAP Live Demo**  
10 Minutes

03

**Question and Answers**  
5 Minutes



DECISIONS for SAP SOLUTIONS™ is a business automation platform focusing on process automation as well as data handling and business rule execution designed for both the business and IT to use *without writing a single line*.

Master Data Governance

Workflow

Business Rules

RPA

Integrations

API's

# About Configurable Management



SAP Silver Partner

Implementing SAP Since 1995

Specialists in Data Quality, Process Automation, and Application Development

Featured Story "20 Most Promising SAP Companies" May 2019 CIO Review



# Example Customers

CONFIDENTIAL AND NOT A COMPLETE LIST



# Common Use Cases

- Master Data Governance
  - Material, Customer, Vendor, Cost Center, Profit Center
- Active Data Governance
- Robotic Process Automation
- Capital Expense Request (AFE)
- PR/PO Release Strategy Management

# Other Example Use Cases

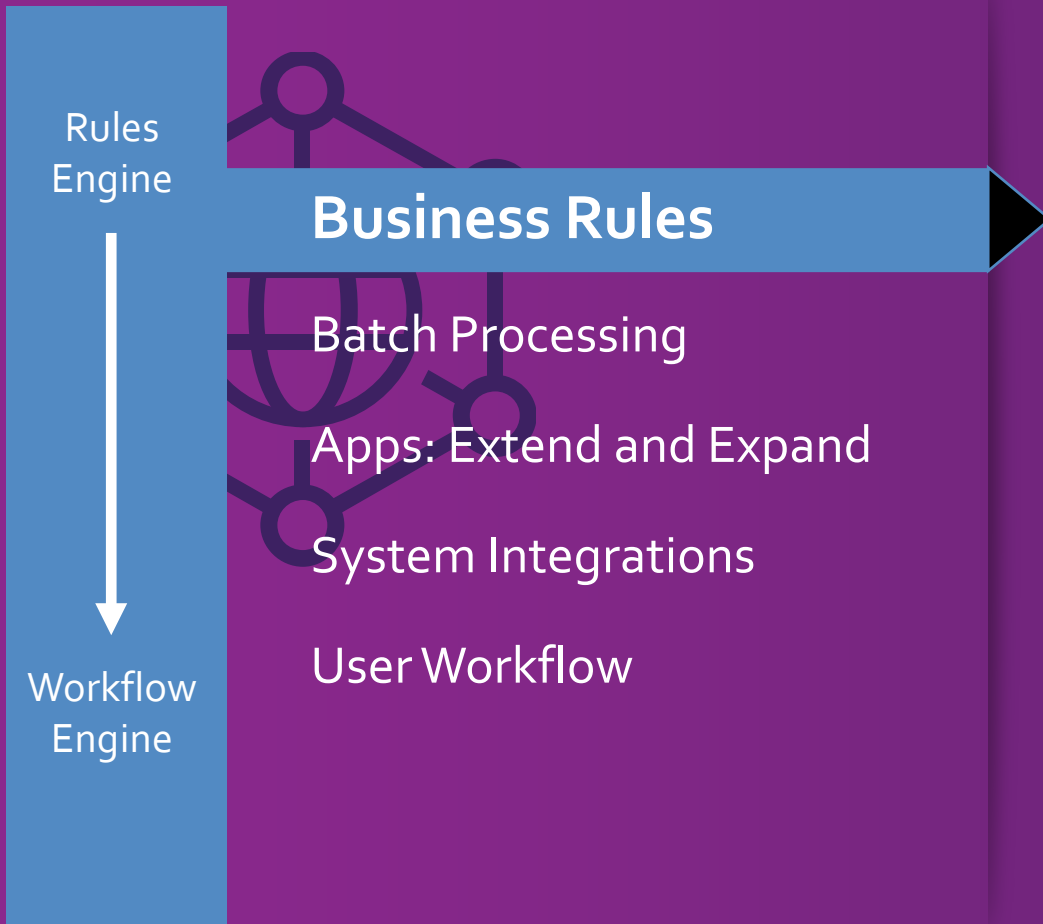
- Configure-Price-Quote Application
- Customer/Vendor Rebates
- Personnel Actions
- Sales Sample Requests
- Return Materials Authorization

# SAP Interface and Accelerators

- D4SAP Core
  - Seamless integration to SAP via SAP's v4.0 .NET Connector
    - BAPI's, RFM's, Transaction Scripting
  - OData Services
- ~400 Pre-built Dropdowns
- Accelerators for Material, Customer, Vendor, more
- Custom SAP Programs



# Automate with D4SAP



## Business Rules Engine

- Enterprise class rules engine
- Expose rules to business to maintain
- Manage permissions
- Predict and populate data

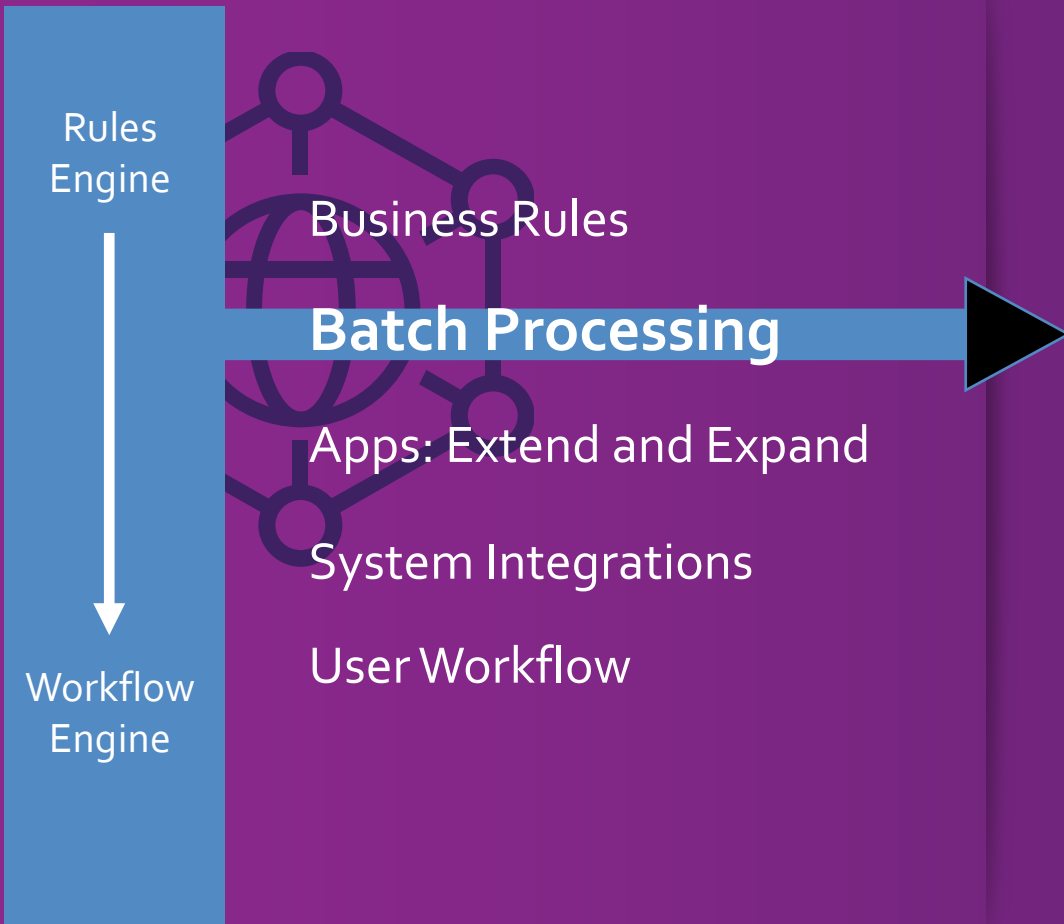
Policy Application.AddressState In List	NOT Policy Application.InstrumentType Contains	Histo
VA, FL, IL, PA, CA, NC, SC, DC	Guitar	-----
DE, AK, NE, TX, AL	Drums	-----
HI, AK	Other	5000
OH, TN, NY, GA	Piano	-----
GA, NC, CA	Violin	0 and

Click To Add Row



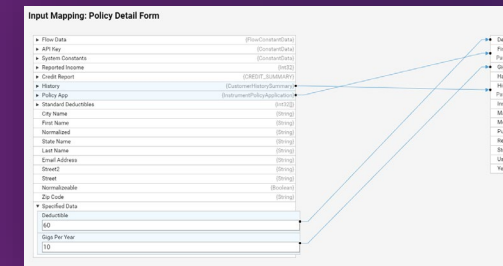
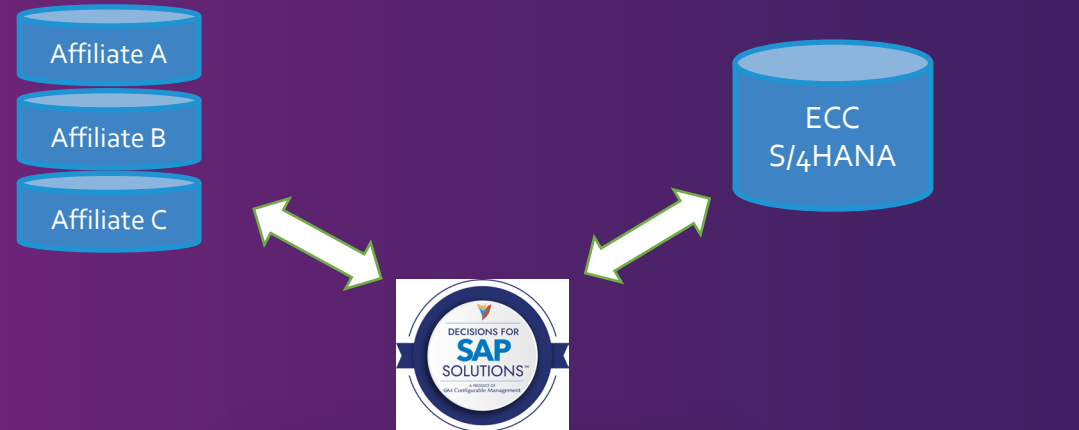
Graphical Rules Editors

# Automate with D4SAP



## Data Mapping & Transformation

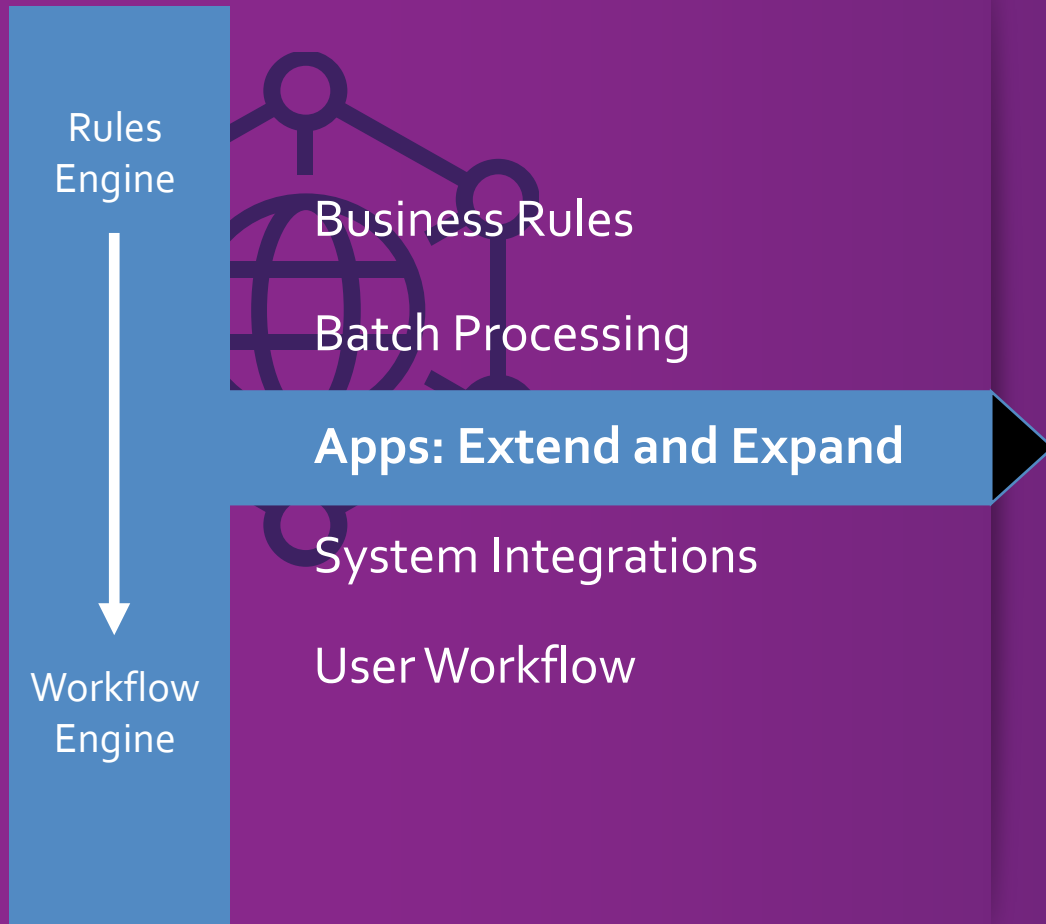
Convert and migrate data into XML, EDI, HL7 with enterprise level performance.



Graphical Data Editors

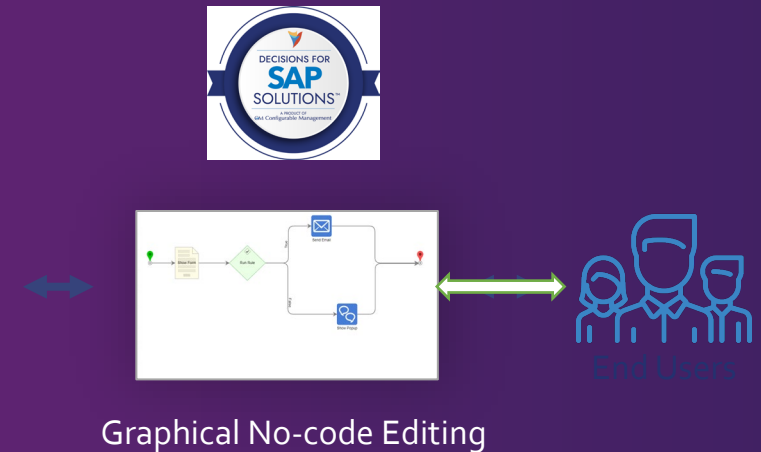


# Automate with D4SAP

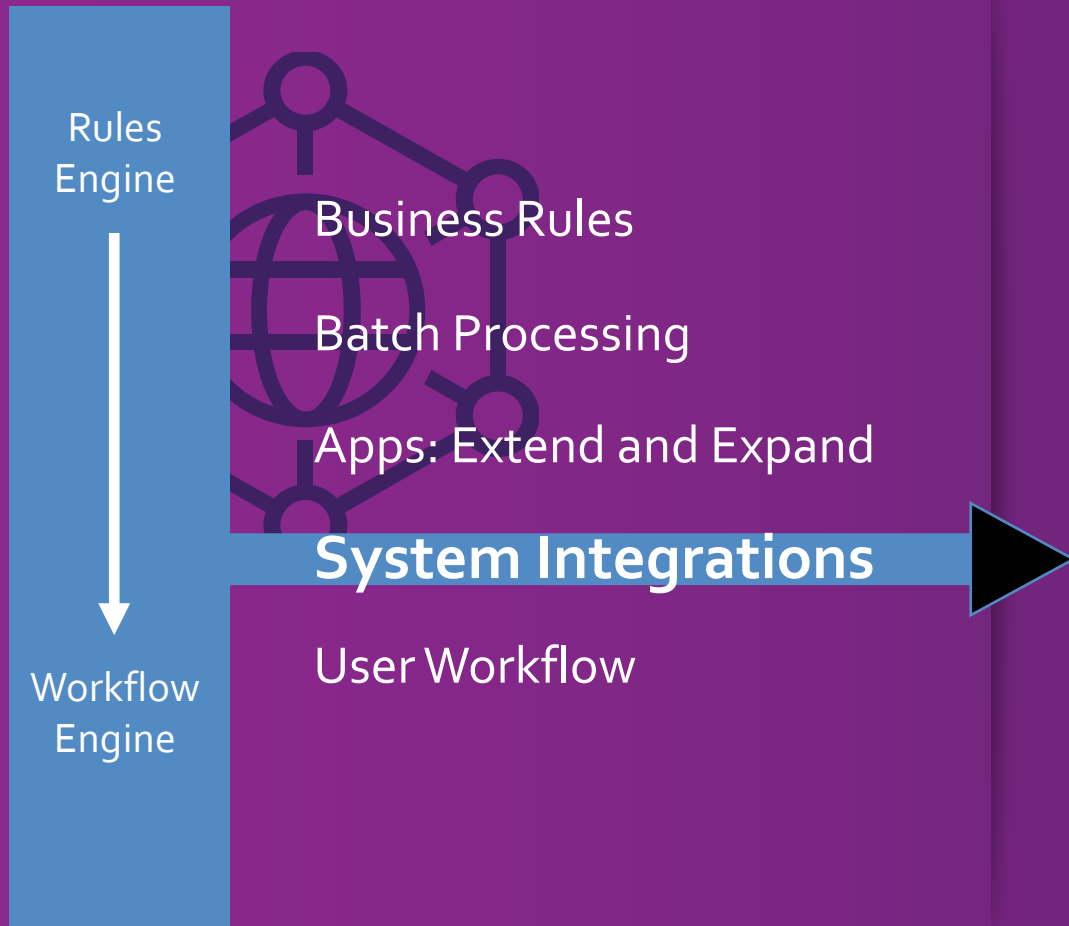


## Special Processes

Leverage the speed of no-code to expand existing solutions with customized processes for example Salesforce to SAP

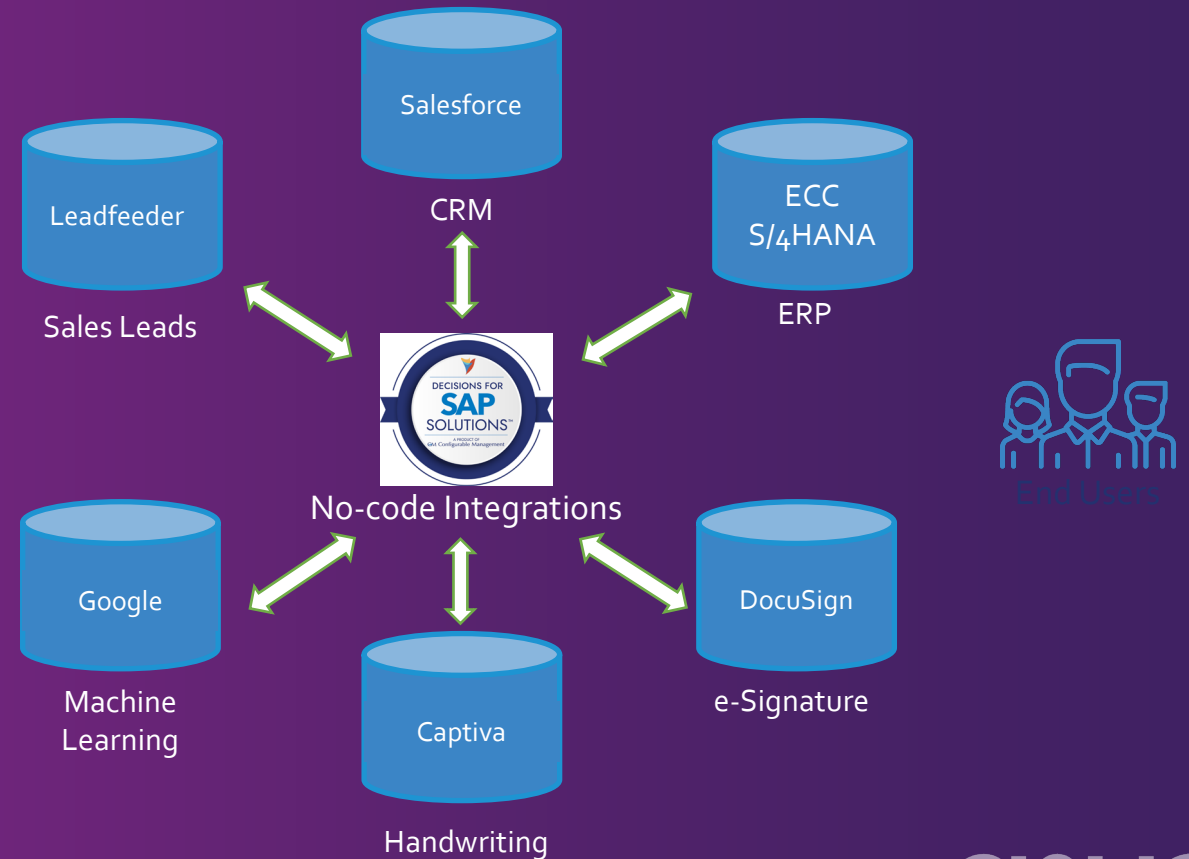


# Automate with D4SAP



## Orchestration

Translate between systems with the power of a rules engine.



# Automate with D4SAP

## Automation & App Building

Build automated workflows and stand-alone applications with actionable dashboards.



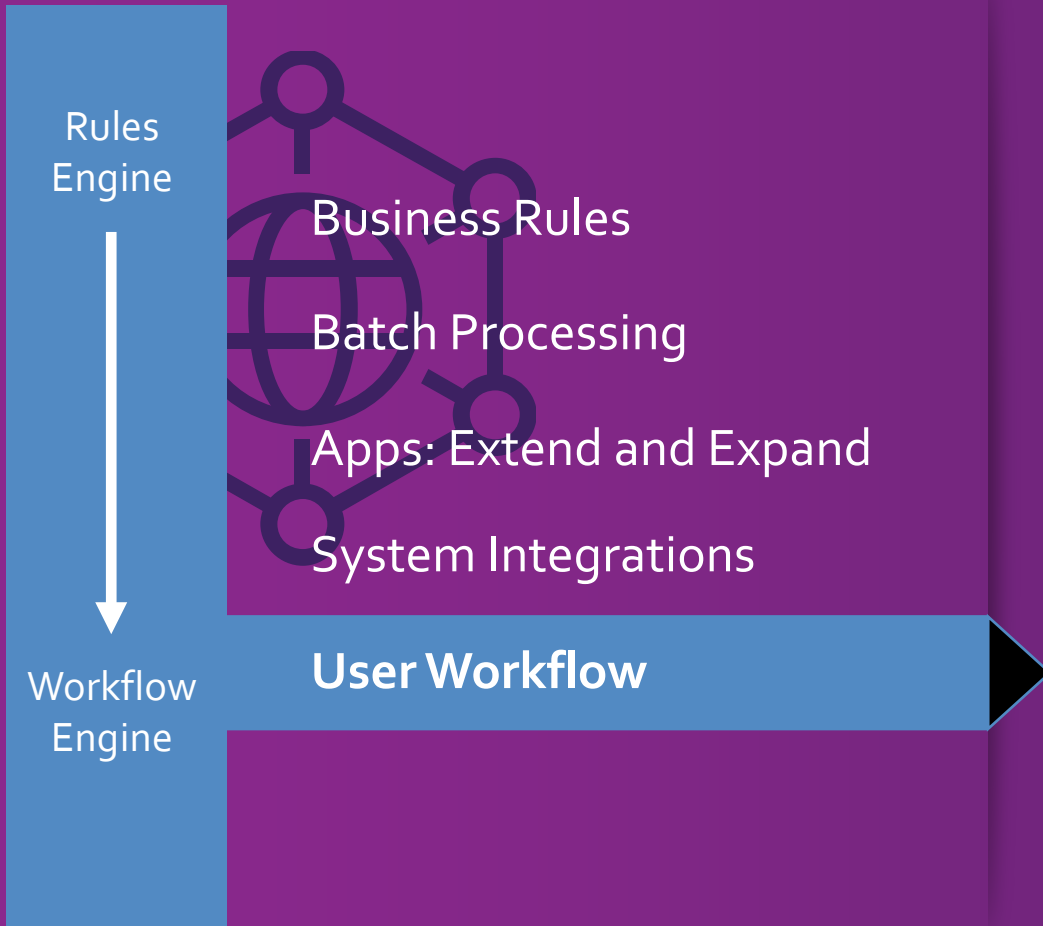
Master Data Governance



Robotic Processing



Application Development Forms



Queues & Task Routing

User Portals

Electronic Signatures

Collect Documents

# D4SAP Platform



## D4SAP PLATFORM

End User Portal

**Lending Queue**

17 Current Processes, 0 Awaiting Documents, 4 Awaiting Signature, Enabled, Downsize Status Checker

Application #	First Name	Last Name	Status	Loan Amount
1	Blair	Bedwards	Verified Loan Received	5000
2	Blair	Smith	Verified Loan Received	5000
3	Paul	Smith	Contract Signed	6000
4	Ulysses	Ward	Declined	6000
5	Brooks	Stone	Declined	5000
6	Clay	James	Declined	7000
7	Hugo	Joseph	Declined	6000
8	Tom	Johnson	Contract Sent	7000
9	Frank	Obama	Declined	7000
10	James	Miller	Loan Received	8000

Dashboards

**Application Information**

Additional Information, Vehicle Information, Total Financing: \$31,500

Forms

My Tasks

Entry Name	Date of Birth	Claim Start D...	Status	Funding Reques...	
1	191/2019	26/2019	Funded / Ready For Submission	\$20,000.00	
2	[Claim 00002] Jones Funeral Home - Jerry Smith	1/25/2019	26/2019	Claim Awaiting / Awaiting Payment	\$234,234.00
3	[Claim 00023] King Fisher Funeral Home - King Junior	1/18/2001	26/2019	In Process	\$97,000.00
4	[Claim 00021] King Funeral Home - Lorne Davis	2/1/2019	26/2019	In Process	\$2,342.00
5	[Claim 00020] Madison Easter Funeral Home - Jane Love	5/25/2000	26/2019	In Process	\$4,500.00
6	[Claim 00016] Mather Funeral Home & Crematory - Jacob	1/22/2019	26/2019	In Process	\$1,225,123.00
7	[Claim 00011] Kings Funeral Home - Kathy Utter	1/22/2018	26/2019	In Process	\$1,225,123.00
8	[Claim 00017] Decisions Funeral Home - John Smith	2/29/2019	26/2019	In Process	\$5,000.00
9	[Claim 00014] Decisions Funeral Home - Joe Harris	2/16/2019	26/2019	In Process	\$50,000.00
10	[Claim 00015] Alpha Funeral - Dana Gamma	2/6/2019	25/2019	In Process	\$30,000.00

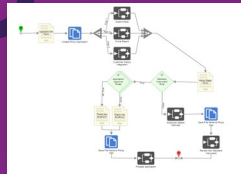
Tasks

Report Viewer

Cloud Sta...	Cloud Stack ID	Cloud Stack Email	Account Owner	Ex...	Estim...	State	
9	Decisio...	001SA0000053E	james@pyrath	elise@decisio...	3/1	7/13/2018	Pending D...
10	Decisio...	001SA0000053E	randy@pyramd	elise@decisio...	3/14	8/5/2018	Exception
11	Decisio...	001SA0000053E	randy@pyramd	elise@decisio...	3/14	8/5/2018	Pending D...
12	Decisio...	001SA0000053E	cory@grandho...	elise+1@decisio...	3/15	8/5/2018	Exception
13	Decisio...	001SA0000053E	mike@grandho...	elise+1@decisio...	3/15	8/5/2018	Pending D...
14	Decisio...	001SA0000053E	mike@us.edu	elise+1@decisio...	4/25	7/13/2018	Exception
15	Decisio...	001SA0000053E	mike@us.edu	elise+1@decisio...	4/25	7/13/2018	Pending D...
16	Decisio...	001SA0000053E	mike@decisio...	elise@decisio...	5/9	7/13/2018	Exception
17	Decisio...	001SA0000053E	mike@decisio...	elise@decisio...	5/9	7/13/2018	Pending Ap...
18	Decisio...	001SA0000053E	cory@grandho...	elise+1@decisio...	7/15	9/5/2019	Pending D...
19	Decisio...	001SA0000053E	cory@grandho...	elise+1@decisio...	7/15	8/5/2018	Pending D...

Reports

Designer Studio



Workflow

**Rules (5)**

Policy Application Rule Configuration

Rules (5)

**Musical Instrument Insurance**

Applicant Information, Policy Information

Forms

Application ID	Applicant	Policy	Status
1	John Doe	Policy A	Active
2	Jane Smith	Policy B	Pending
3	Bob Johnson	Policy C	Declined

Reports

**Current Applications**

Dashboards

**Integrations**

Integrations

CUSTOM / API / SDK / MICROSERVICES

# D4SAP Platform



## D4SAP PLATFORM

End User Portal

Application #	Applicant	Last Name	Status	Loan Amount
1	SP1000142	Blair	Backpack	5000
2	SP1000175	Blair	Jack	3000
3	SP1000023	Paul	Smith	4000
4	SP1000142	Blair	Smith	4000
5	SP1000142	Blair	Smith	4000
6	SP1000142	Blair	Smith	4000
7	SP1000142	Blair	Smith	4000
8	SP1000142	Blair	Smith	4000
9	SP1000142	Blair	Smith	4000
10	SP1000142	Blair	Smith	4000

Dashboards

Application Information

Additional Information

Vehicle Information

Total Finance: \$21,500

Forms

Entry Name	Date of Death	Claim Start Date	Status	Funding Status
[Claim 000024] Pac Funeral Home - Dick Harty	1/31/2019	2/6/2019	Ready For Submission	\$20,000.00
[Claim 000025] Jones Funeral Home - Jerry Smith	1/25/2019	2/6/2019	Submitted / Waiting Payment	\$234,254.00
[Claim 000022] King Fisher Funeral Home - King Justin	1/18/2019	2/6/2019	In Process	\$97,000.00
[Claim 000021] King Funeral Home - Lorie Davis	2/1/2019	2/6/2019	In Process	\$2,342.00
[Claim 000020] Madison Easter Funeral Home - Jane Love	5/25/2000	2/6/2019	In Process	\$4,500.00
[Claim 000018] Matfer Funeral Home & Crematory - Jacob	1/22/2019	2/6/2019	In Process	\$234,254.00
[Claim 000016] King's Funeral Service - Kathy Slater	12/27/2018	2/6/2019	In Process	\$1,225,123.00
[Claim 000017] Decisions Funeral Home - John Smith	2/29/2019	2/6/2019	In Process	\$3,000.00
[Claim 000016] Decisions Funeral Home - Joe Harris	2/18/2019	2/6/2019	In Process	\$50,000.00
[Claim 000015] Alpha Funeral - Beta Gamma	2/6/2019	2/5/2019	In Process	\$30,000.00

Tasks

Cloud Sta...	Cloud Stack N	Cloud Stack Email	Account Owner	En...	Estim...	State	
9	Decisio...	0016A0000000K	james@pshah	etse@decisions	3/17	7/13/2	Pending D...
10	Decisio...	0016A0000005E	randy@pyramd	etse@decisions	3/14	6/5/2018	Exception
11	Decisio...	0016A0000005E	randy@pyramd	etse@decisions	3/14	6/5/2018	Pending D...
12	Decisio...	0016A0000005E	corey@grandho	etse+1@decisio	3/15	6/5/2018	Exception
13	Decisio...	0016A0000005E	corey@grandho	etse+1@decisio	3/15	6/5/2018	Pending D...
14	Decisio...	0016A0000005E	mike@ua.edu	etse+1@decisio	4/25	7/13/2	Exception
15	Decisio...	0016A0000005E	mike@ua.edu	etse+1@decisio	4/25	7/13/2	Pending D...
16	Decisio...	0016A0000005E	mike@decisions	etse@decisions	5/8	7/13/2	Exception
17	Decisio...	0016A0000005E	mike@decisions	etse@decisions	5/8	7/13/2	Pending Ap...
18	Decisio...	0016A0000005E	corey@grandho	etse+1@decisio	7/15	6/5/2018	Pending D...
19	Decisio...	0016A0000005E	corey@randho	etse+1@decisio	7/15	6/5/2018	Pending D...

Reports



End Users



Company Portal  
Website Sharepoint



Email



Mobile SMS

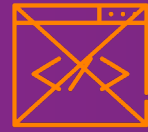


Telephone

# D4SAP Platform



Business Analysts



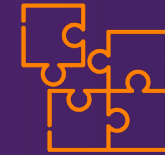
Codeless Creation



Robust Applications with testing, monitoring

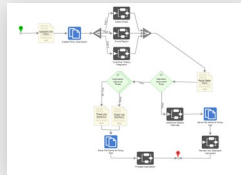


Audit Trail

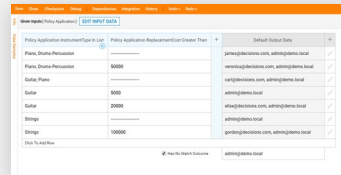


Integrations

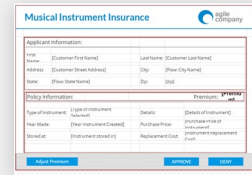
Designer Studio



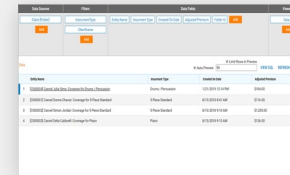
Workflow



Rules (5)



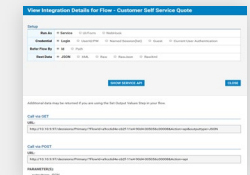
Forms



Reports



Dashboards

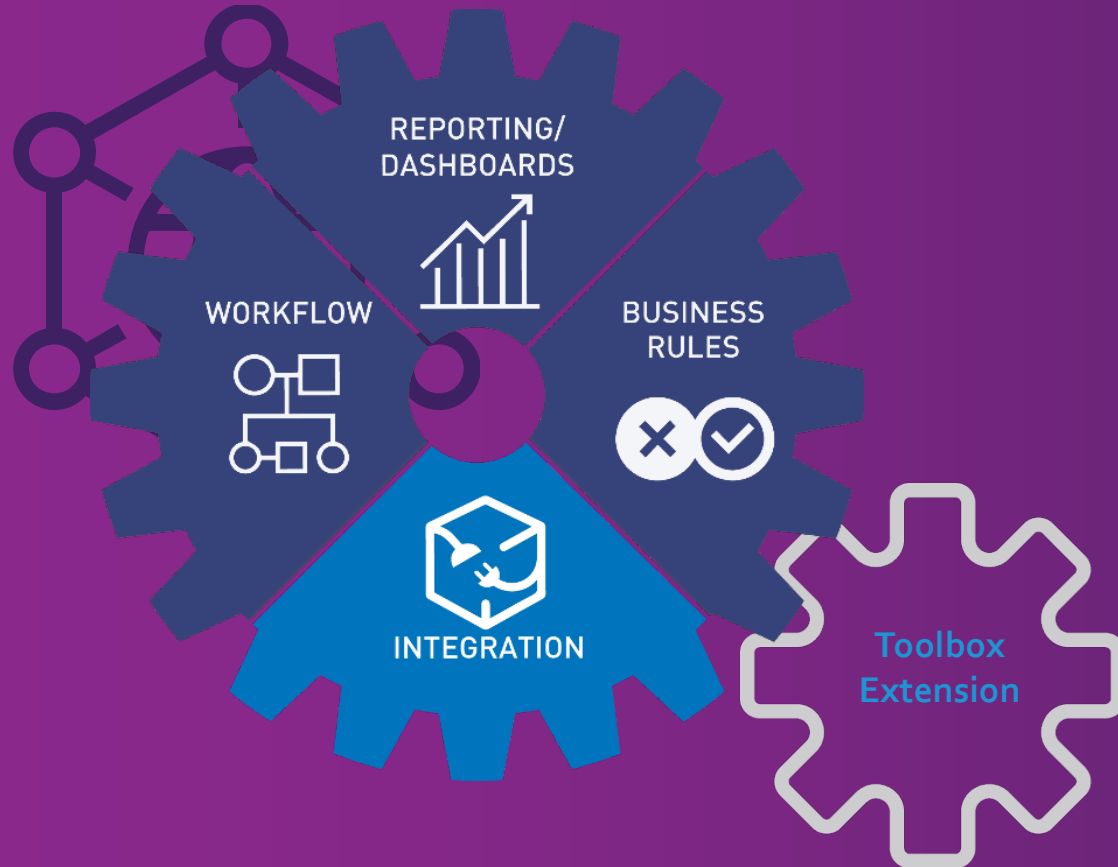


Integrations

CUSTOM / API / SDK / MICROSERVICES



# Integration: Software Development Kit

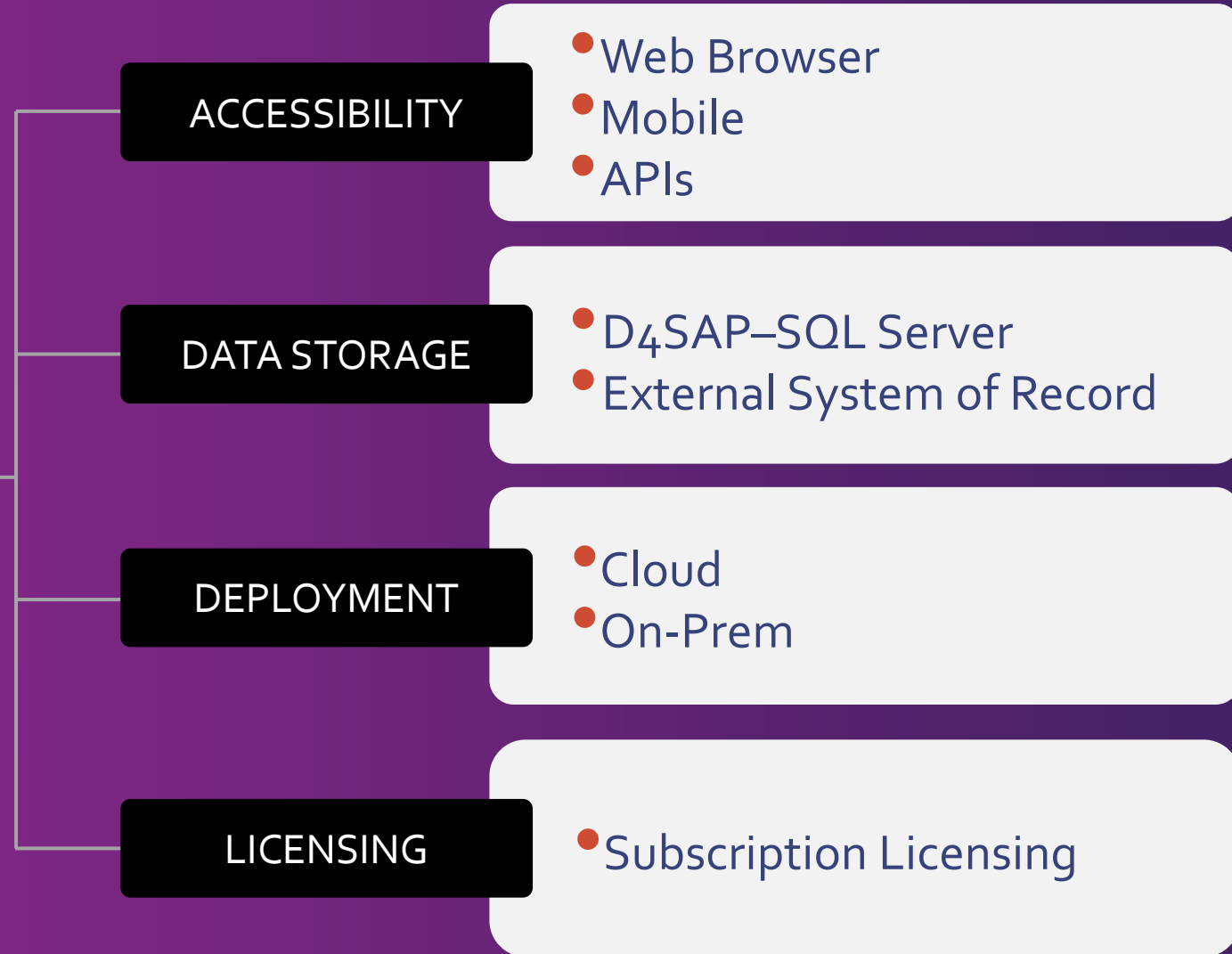


## .NET-Based SDK

Create customized:

- Flow Steps
- Data Structures
- Custom Integrations
- Rule Steps
- UI Elements
- Data Sources

# Flexible Architecture





# Coming Soon - SCRIPTONITE



- SAP Transaction Recording
  - Record, Map, Load
  - Mass Uploads or Updates
- Workflow
  - Control who, what, when
  - Audit Trail
- Business Rules
  - Data Quality Assurance



# Coming Soon - WINGMAN



- Application Lifecycle Management
  - Requirements to Build
  - Change Requests
- Test Execution Management
  - Unit, Integration, User Acceptance
  - Defect to Resolution
  - Reporting and Dashboards

# Technology's Multi-tool





# THANK YOU

## Write Us

SALES  
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SUPPORT  
[support@cfg-mgt.com](mailto:support@cfg-mgt.com)

## Call

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CONTACT  
1-972-608-3799