an✦tyss

100% Transparent and Real-Time Tracking of Reconciliation Tasks for a US-Based Community Bank with Power BI Dashboard

Client Introduction

A leading US-based community bank that offers banking, mortgage and commercial lending, funding, treasury, and other prominent services.
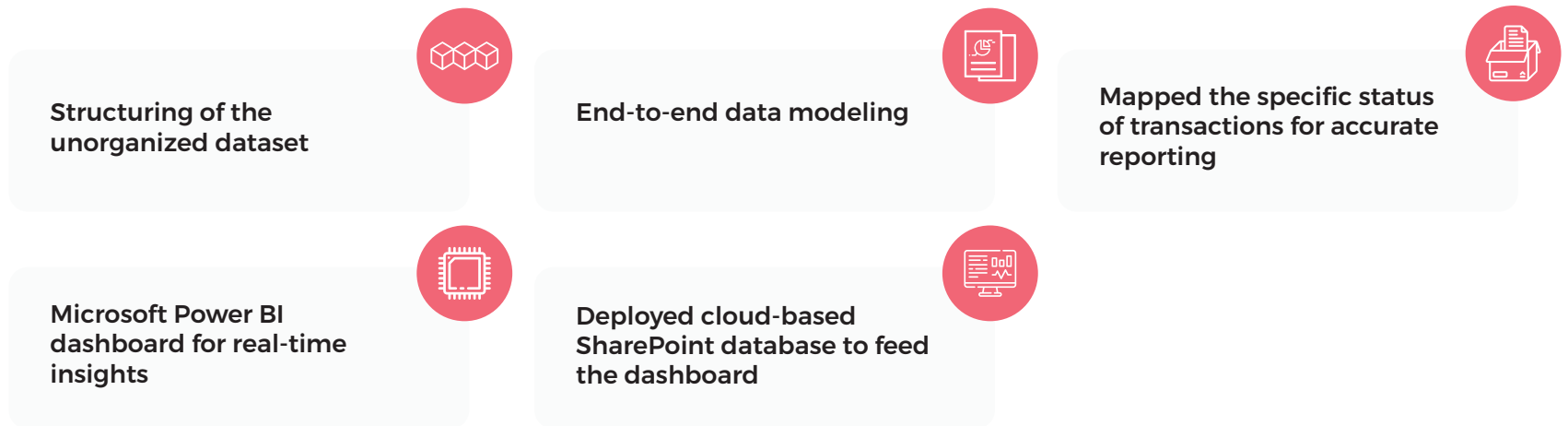
Problem Statement

✦ A large backlog of unreconciled transactions

✦ Unstructured transactions data with a lack of business insights

✦ Inadequate transaction monitoring, data collection, and reporting

✦ Lack of digital tooling to support automation

✦ No tracking system to facilitate transaction reconciliation

Solutions Offered

Anaptyss leveraged its proprietary Digital Knowledge Operations™ (DKO™) approach to organize the unstructured dataset and perform advanced data modeling to deploy a customized Power BI dashboard for real-time transaction monitoring and reporting.

Key solution delivered:

Structuring of the unorganized dataset

End-to-end data modeling

Mapped the specific status of transactions for accurate reporting

Microsoft Power BI dashboard for real-time insights

Deployed cloud-based SharePoint database to feed the dashboard

Business Outcomes

100%
Transparent, accurate, and up-to-date reports

Zero
Downtime with faster reporting

Real-time
Tracking of reconciliation tasks

KPI tracking
With historical trends and outcomes

Accurate
Decision Making

24x7
Mobile access to the project dashboard

Want to explore our intelligent digital solutions for your business?

Write to us:

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