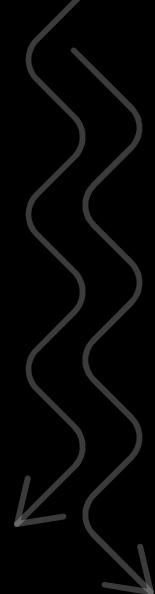


Taming complexity

How BeOne uses dynamic
DMN rules generation
for tax regulations



CAMUNDA
CON 2024

BeOne

Marcin Makowski • CEO

ROBOTIC
LEADER

Jerzy M. Mikosz • Founder

About us

Multitenant environments

50+

ready to use process templates for BPO

1000+

companies serviced on platforms

200.000+

business users

100+

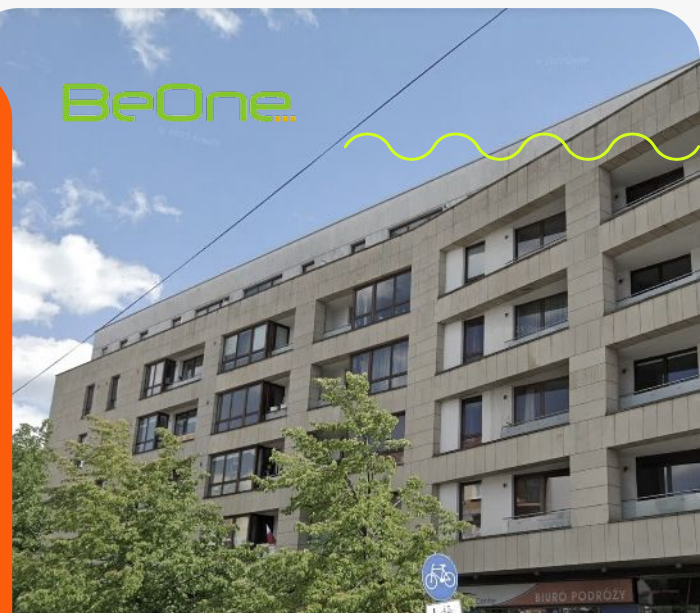
integrations

Our Mission

We are open to your ideas,
processes, and software

BeOne

- Leading company implementing Camunda in Poland
- Support the leaders in a very competitive market



Accounting should have been automated (*)



Unicorn or Capricorn?



Form **1040** Department of the Treasury—Internal Revenue Service
U.S. Individual Income Tax
 For the year Jan. 1–Dec. 31, 2023, or other tax year beginning _____
 Your first name and middle initial _____
 If joint return, spouse's first name and middle initial _____
 Home address (number and street). If you have a P.O. box, see _____
 City, town, or post office. If you have a foreign address, also see _____
 Foreign country name _____

Filing Status

Single
 Married filing jointly (even if only one has income)
 Married filing separately (MFS)
 If you checked the MFS box, enter the qualifying person is a child but not you _____

Digital Assets At any time during 2023, did you: (a) receive, exchange, or otherwise dispose of a digital asset? Yes No

Standard Deduction **Someone can claim:** You as a dependent Spouse itemizes on a separate return



Wegleitung zur Steuererklärung

Juristische Personen

DECLARATION

Kanton Glarus

Ufficio di tassazione delle persone giuridiche

Viale S. Franscini 6
 6501 Bellinzona

www.ti.ch/etax
 dfe-ddc.etaxpg@ti.ch

Juristische Personen und Personengesellschaften mit Sitz oder (bei Sitz im Ausland) Hauptverwaltung im Kanton

ti Repubblica e Cantone Ticino

Formular 18a

AARGAU

VORWORT

Das Kantonsblatt dient als Ergänzung der im Kantonsblatt veröffentlichten Steuererklärungen bis zum 30.06.2022

Steuerverwaltung

Wegleitung zur Steuererklärung 2023

Steuerverwaltung

Wegleitung zur Steuererklärung 2023

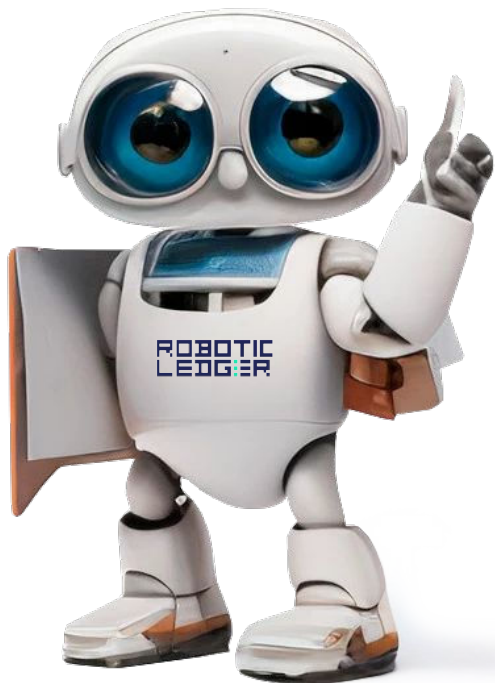
KANTON URI

Wegleitung zur Steuererklärung 2023

2

Personengesellschaften (Formular 11a)

Solution: Luca, a digital junior accountant



Luca

Born in 2019

Named after Luca Paccioli

First job in 2021

Clients on a waiting list

Looking for a scalable technology

Luca prepares journal entries in an accounting system for the incoming documents he understands.

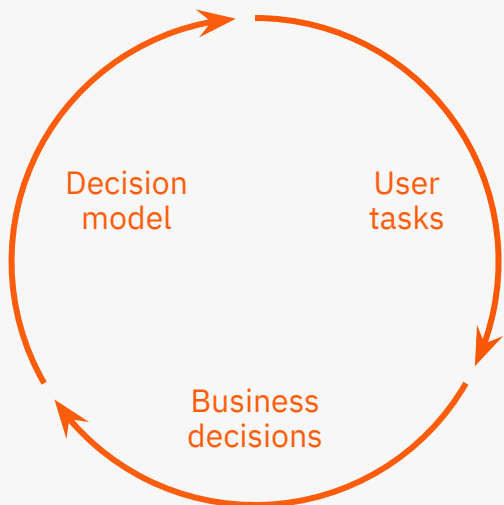
If he has doubts, will ask for help.

He remembers and applies all the rules ever set for a specific ledger.



Possibilities of taming reality

Orchestration of user tasks and decisions for their automation



Repeatable manual tasks

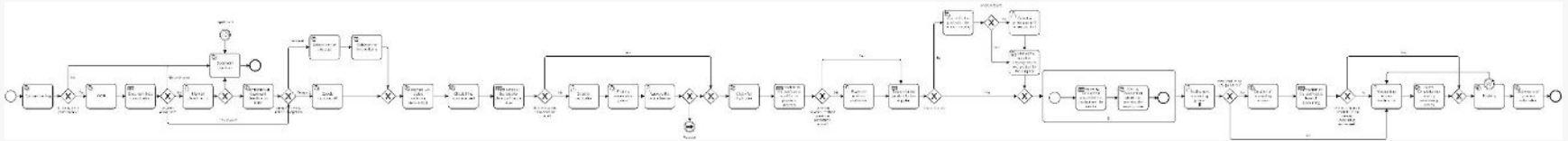
Large number of companies

Structuring information based on content and professional guidelines

Stable decision model

Predictable decisions

Automatic invoice classification and posting process decomposition



Document
classification

Content
understanding

Vendor verification

Product assignment

Tax classification

Unstructured data

Decisions

Structured data + rules



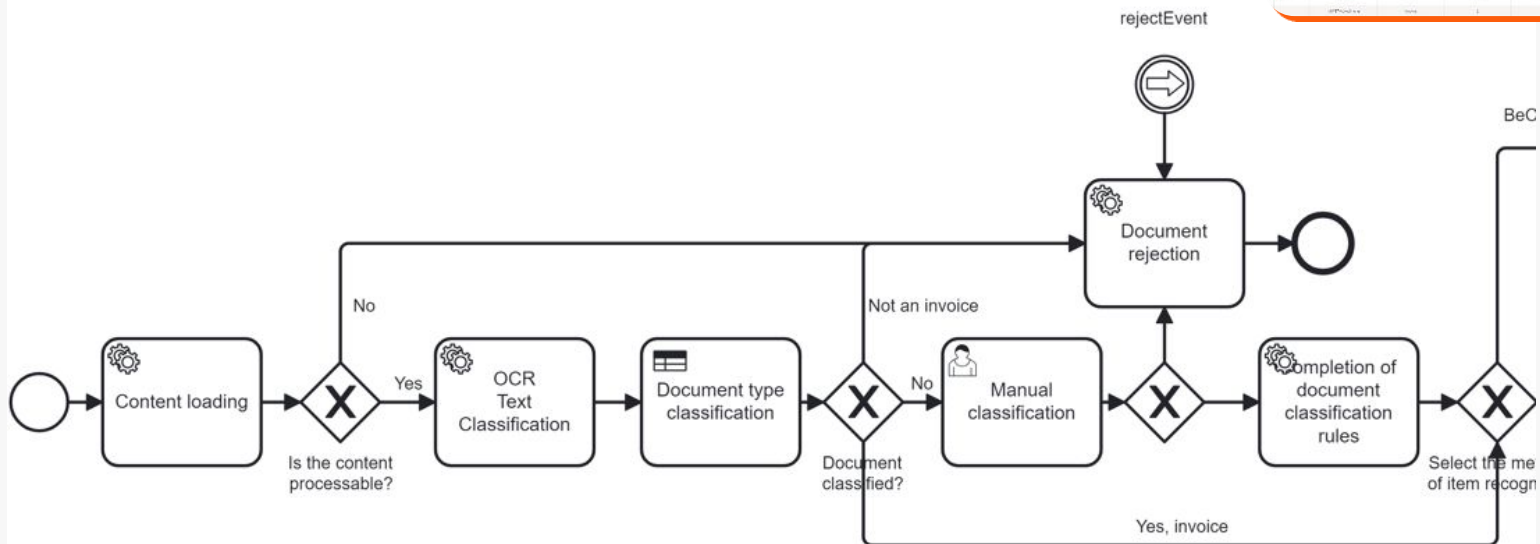
Document classification



Document rules

- DMN for word precedence and ambiguity limitation
- Manual classification complements rules

ID	Type	Status	...
D1	Invoice	Success	...
D2	Receipt	Success	...
D3	Contract	Success	...
D4	Letter	Failed	...
D5	Receipt	Success	...
D6	Receipt	Success	...
D7	Receipt	Success	...
D8	Receipt	Success	...
D9	Receipt	Success	...
D10	Receipt	Success	...
D11	Receipt	Success	...
D12	Receipt	Success	...
D13	Receipt	Success	...
D14	Receipt	Success	...
D15	Receipt	Success	...
D16	Receipt	Success	...
D17	Receipt	Success	...
D18	Receipt	Success	...
D19	Receipt	Success	...
D20	Receipt	Success	...

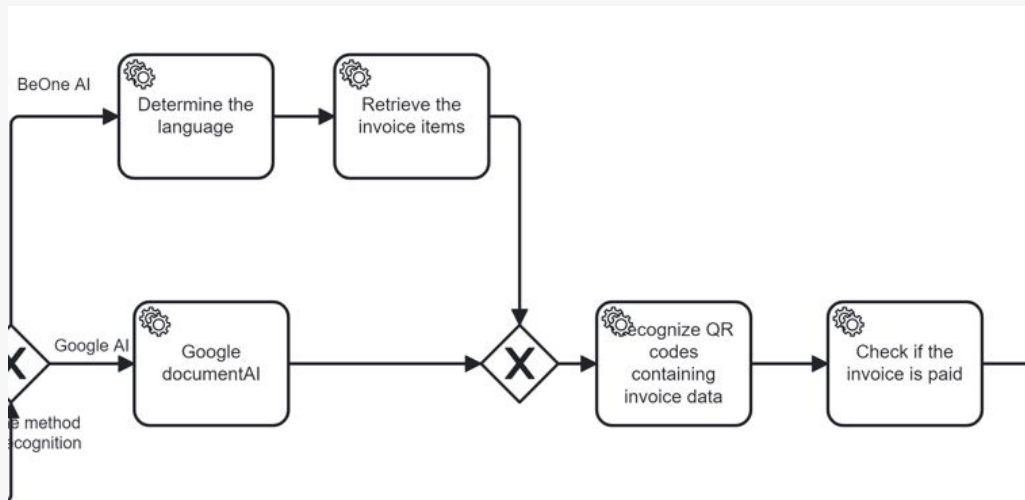


Invoice item recognition



Rules for document content

- BeOne or Google Document AI for items recognition
- QR code qualification
- Payment verification based on keywords

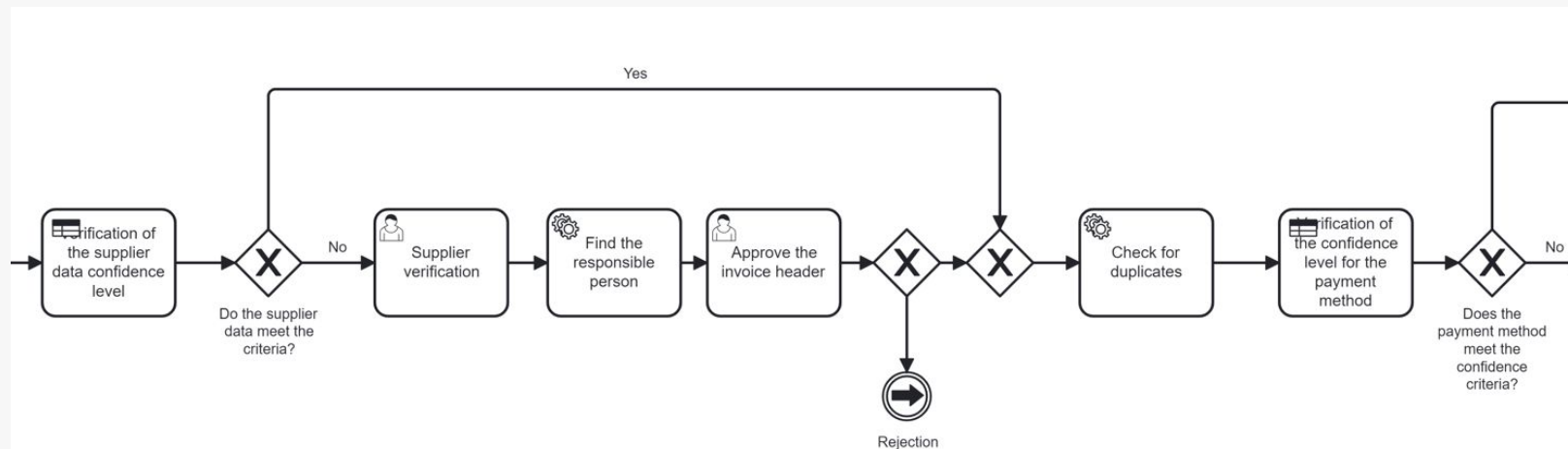


Release a posting header



Issuer rules

- Issuer confidence verification (DMN)
- Manual verification if required
- Duplicate detection
- Detection and verification of the payment method (DMN)



Detection of accounting items



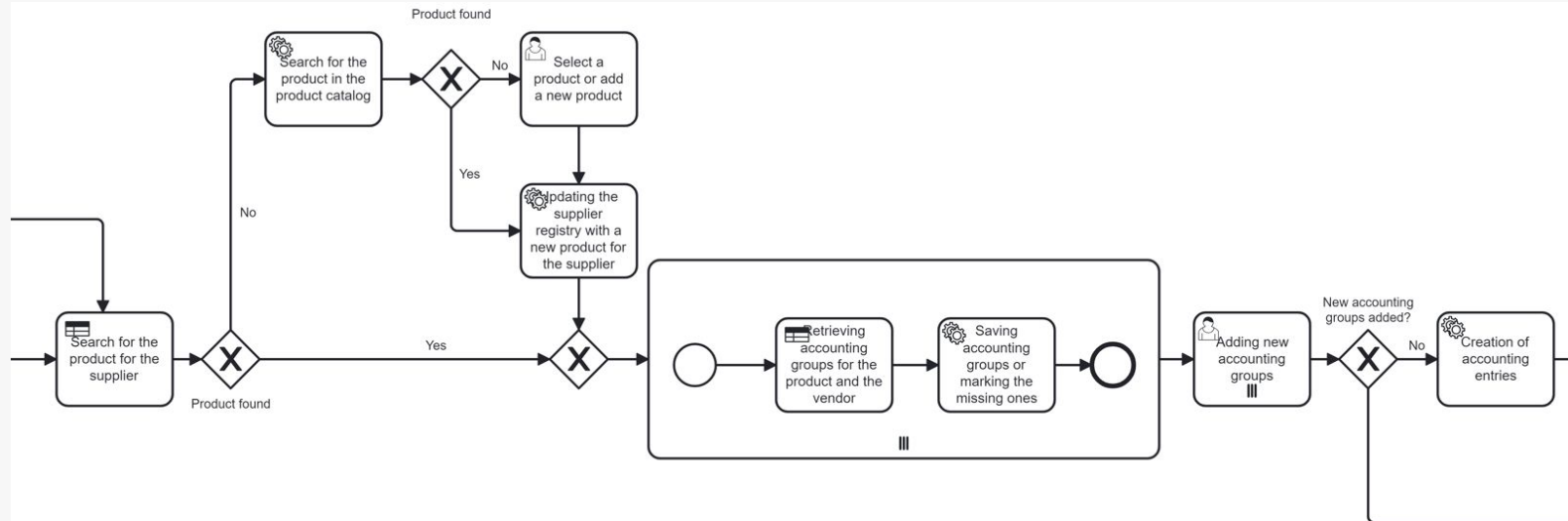
Item rules

- Product assignment for invoice items grouping
- Product group classification based on DMN tables and issuer context
- Manual new product group creation
- Automatic posting lines creation and tax rate determination

Product Group	Product	Supplier	Tax Rate
...
...
...
...
...

Default Parameters

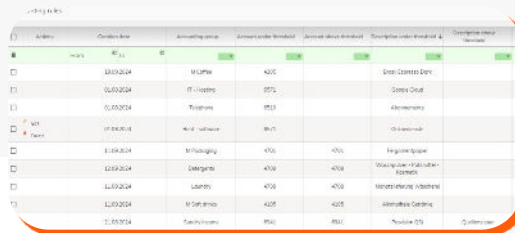
...
...
...
...
...
...



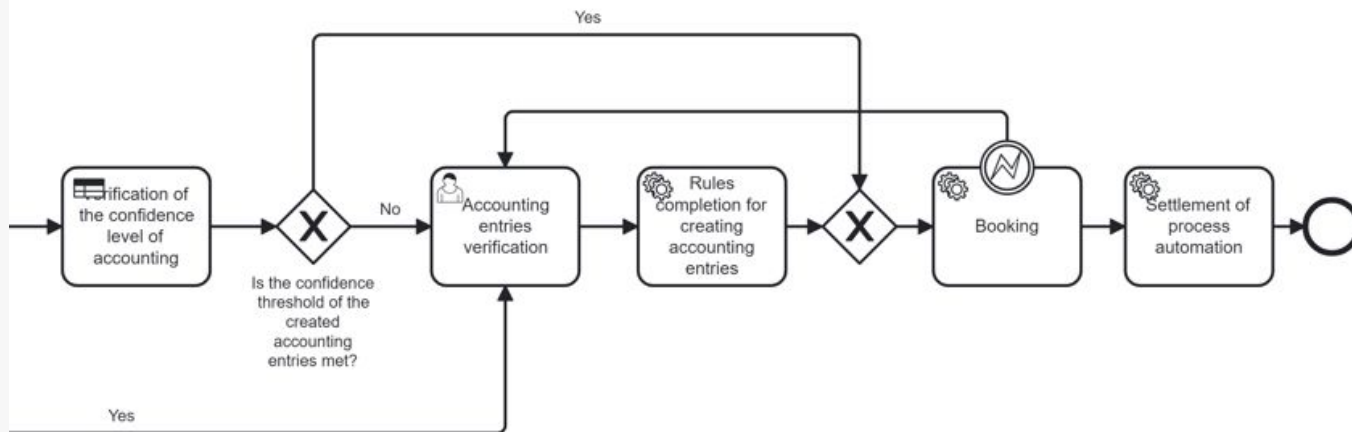
Invoice posting

Posting rules

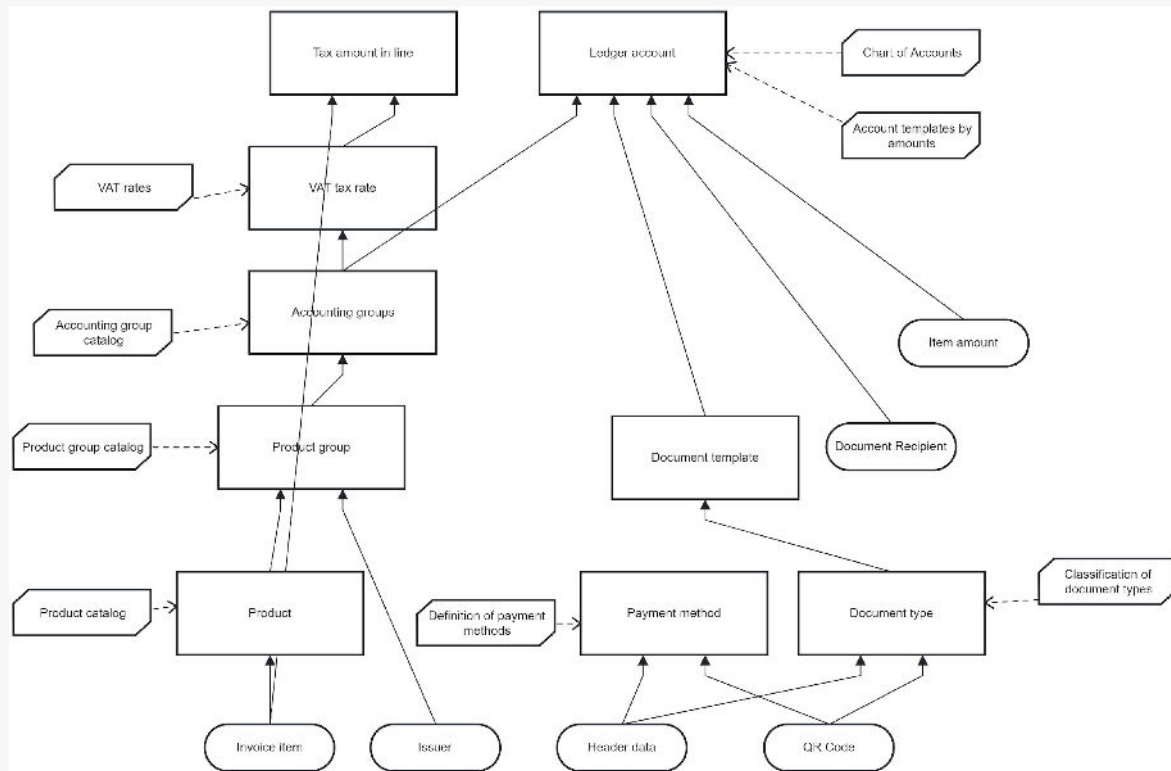
- Posting confidence verification (DMN)
- Automatic posting to the accounting system



DATE	DESCRIPTION	AMOUNT	BALANCE	COUNTERPART	DESCRIPTION	AMOUNT	BALANCE
01/01/2014	Income	4000	4000				
01/01/2014	Income	3970	3970				
01/01/2014	Expense	950					
01/01/2014	Income	3020	3020				
01/01/2014	Expense	4700					
01/01/2014	Income	4700	4700				
01/01/2014	Income	4200	4200				
01/01/2014	Expense	850	850				



Detection of accounting items

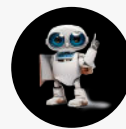


Accounting offices benefits

Satisfaction of existing and new customers

- Quality and stability of processes
- Reduction of mistakes
- Risk mitigation
- Auditability
- Processing speed
- **New services**

Social
community
knowledge



Professional
community
knowledge



You pay when you earn



●
Accessibility

●
Alignment
of Interests

●
Reduced
Financial Risk

●
Easy knowledge
gathering based
on user behaviors
and decisions

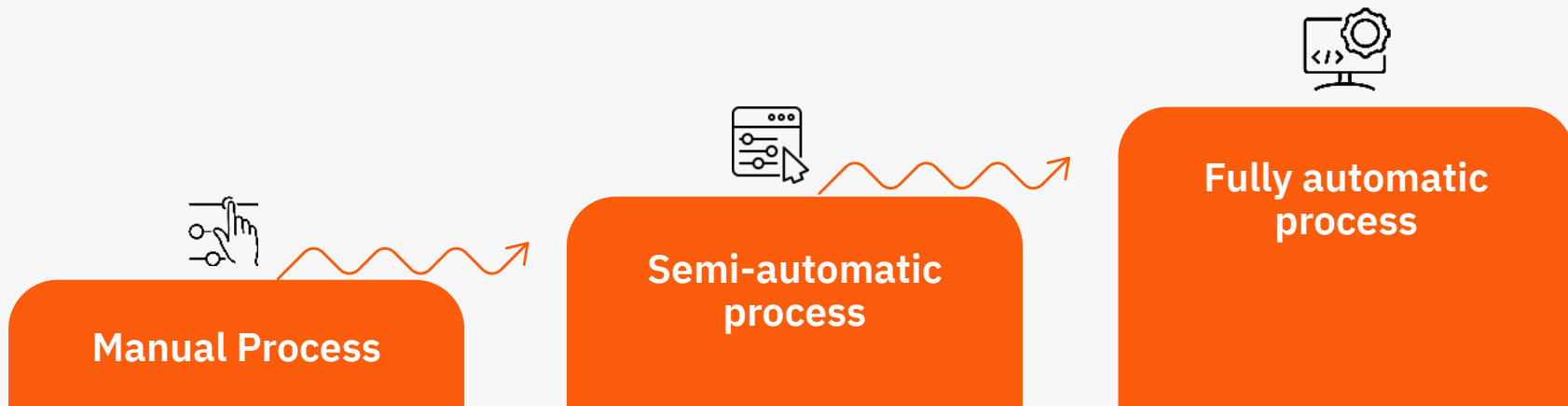
●
No usage
monitoring
required



Collecting rules automates process everywhere

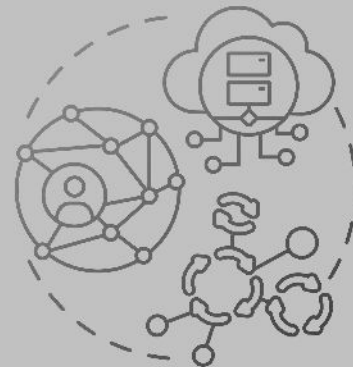
- Google searches web pages using query [advertisement]
- ChatGPT generates answers based on the data it was trained on [sometimes incorrect answers]
- Luca generates correct decisions trained on manual decisions

Collective knowledge that is easy to share



Data security and rule sharing

- Tenants for Accounting Offices and subtenants for their clients
- Gathering community knowledge based on rules shared among tenants
- Process-Level Security based on roles and groups
- Data encryption
- Secured communication with Bexio and other accounting systems



MULTITENANT
ARCHITECTURE



Key technical takeaways

- Building solutions for communities **differs** from building solutions for organizations
- The heart of processes are **decisions** which are the fuel of automations
- Building **self sustaining** model of decision is a natural way of collecting professional knowledge



What if we get it right?

There are over **600.000 SMEs** in Switzerland, creating **2/3 of the jobs**.

They receive about **120.000.000 documents** a year.

We will have a self-filling accounting model for all of them.



BeOne

ROBOTIC
LEDGER

Q&A



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