



# Best Practices for Back Office OPEX and How PEX Drives Success



## Set Clear Objectives

Operational Excellence (OPEX) starts with identifying the gaps in back office performance and identifying priorities for improvement.

PEX offers a comprehensive spend and expense management solution that uses corporate cards, vendor cards, software integrations, and more to streamline financial operations and control spending. Whatever your objectives, PEX can help.



## Integrate Technologies

When you integrate technologies, instructions in one program drive actions in another, streamlining operations and reducing the steps needed to complete a task.

Out of the box, PEX integrates a range of corporate and virtual vendor payment cards with expense management. PEX also offers [off-the-shelf integrations](#) with accounting and ERP programs, plus an [API](#) to integrate PEX with other business systems.



## Use Scalable, Cloud-based Technologies

Robust, cloud-based solutions can offer greater scalability and security with no significant upfront capital investments.

PEX can let you scale to as many cards (customers have used thousands) or payments as you need. You can also scale the platform to serve multiple businesses and budgets. [PEX partners](#), in fact, issue cards with their own design to serve hundreds of customers and thousands of users on our platform.



## Don't Compromise on Security

Make sure your vendor transmits all transactions over a secure network with strong encryption, safeguarding data during the transmission process, like PEX's PCI-compliant network.

PEX software was built for security. You can [program corporate cards](#) (through manual or automated processes) to control when, where, and how they can be used. You can program our vendor cards so they work only for one vendor one day for one amount, making misuse almost impossible.



## Leverage Technology

Cloud computing. Enterprise Resource Planning. Artificial Intelligence. Technologies like these have helped countless companies operate more nimbly and efficiently. PEX's proven finance solution drives efficiencies through the spending lifecycle—from pre-purchase to payment and reconciliation, including approvals, purchase order and receipt storage, releasing funds for purchases, expense report routing, and more. [Request a free demo.](#)



## Automate Repetitive, Time-Consuming Tasks

For many, OPEX and automation are one in the same. It's proven to increase productivity, improve efficiency, and reduce errors.

PEX lets you automate any or all of the spending life cycle—issuing cards, [populating and processing expense reports](#), funding purchases, and more. Integrate PEX with your accounting system and you can see [90%+ efficiency gains](#) through automatic uploading approved spending to your ledgers—with no manual data entry.



## Prioritize Intuitive, User-Friendly Interfaces

Many business process improvement plans fail because staff can't use the new systems. Despite companies spending thousands of dollars on training and support.

PEX [top-rated user experience](#) starts with [the application](#) and continues right through implementation and launch. Most users can learn the system in minutes. Many log into their account and issue cards and payments in the first minutes after opening an account.



## Repeat

OPEX is a process, not a goal. Smart companies are always on the lookout for new efficiency and cost cutting opportunities. You should always be asking what you can do better.

Which, in fact, is what we do here at PEX. So far in 2024, we've added more than a dozen [new features and tools](#) to our platform (with no downtime) to drive efficiency in the spending and expense cycle. Many were requested by customers. All improve the customer experience.



See firsthand how PEX can drive OPEX in your back office. [Request a free demo.](#)