

# OTC DataBridge Copilot.

A 10 to 12 week governed pilot to cleanse, map, and validate Order to Cash master data at SAP migration scale, with data stewards in control of every decision.

**DURATION**

► 10–12 weeks

**WORKSTREAM**

► Order to Cash

**MODEL**

► Human-in-the-loop

**AUDIT**

► 100% coverage

## 01 WHY THIS MATTERS

- **Master data is revenue.** Customer, pricing, EDI, and tax fields decide whether an order ships, an invoice clears, and cash arrives on time.
- **Defects become disruptions.** Small data errors cascade into blocked orders, incorrect invoices, deductions, and delayed cash.
- **Migration multiplies risk.** At cutover scale, manual SME triage does not keep up. The wrong defects ship into the new system.

## 02 FOUR PAIN MECHANICS WE SOLVE

1

**CUSTOMER MASTER****Blocked Orders**

Missing ship-to records and broken hierarchy links stop orders before they can be released.

2

**PRICING & TAX****Incorrect Invoices**

Stale condition records and broken tax codes create billing errors and downstream credit work.

3

**DUPLICATES****Deduction Leakage**

Inconsistent customer hierarchies and duplicate records cause unrecovered deductions and disputes.

4

**MIGRATION****SME Bottleneck**

Manual record-level triage does not scale across millions of rows in a cutover window.

**THE QUESTION**

How do we cleanse, map, and validate OTC master and transactional data at migration scale, without losing steward control or the audit trail?

### 03 THE DATABRIDGE COPILOT, IN FIVE STAGES

| Stage 01                                                                        | Stage 02                                                                         | Stage 03                                                                        | Stage 04                                                                         | Stage 05                                                                     |
|---------------------------------------------------------------------------------|----------------------------------------------------------------------------------|---------------------------------------------------------------------------------|----------------------------------------------------------------------------------|------------------------------------------------------------------------------|
| <b>Ingest &amp; Profile</b><br>Statistical fingerprint of every in-scope field. | <b>Detect Anomalies</b><br>Similarity scoring surfaces duplicates and conflicts. | <b>Recommend &amp; Remember</b><br>AI mapping proposals with confidence scores. | <b>Review &amp; Approve</b><br>Stewards approve, override, or reject every call. | <b>Record for Audit</b><br>Full decision trail captured for SOX and cutover. |

### 04 OTC DATA IN SCOPE

| MASTER DATA · DOMAINS  |                                      | TRANSACTIONAL DATA · RECORD TYPES |                             |
|------------------------|--------------------------------------|-----------------------------------|-----------------------------|
| Customer Master        | <i>Sold-to, ship-to, hierarchies</i> | Sales Orders                      | <i>Open and recent</i>      |
| Pricing & Conditions   | <i>Discounts, rebates, currency</i>  | Billing Documents                 | <i>Invoices, credits</i>    |
| EDI / Trading Partner  | <i>Message maps, cross-refs</i>      | Deliveries & Shipping             | <i>Fulfillment records</i>  |
| Tax & Compliance       | <i>Jurisdictions, attributes</i>     | MRP & Inventory                   | <i>Availability signals</i> |
| Material / Sales Views | <i>Sales-org, item categories</i>    | AR & Open Items                   | <i>Aging and disputes</i>   |

### 05 SUCCESS MEASURES

|                                                                         |                                                                   |                                                                   |
|-------------------------------------------------------------------------|-------------------------------------------------------------------|-------------------------------------------------------------------|
| <b>25 – 40%</b><br>Manual review hours avoided across in-scope domains. | <b>&gt; 80%</b><br>Duplicate candidate precision on scored pairs. | <b>&gt; 70%</b><br>Steward acceptance of mapping recommendations. |
| <b>20 – 30%</b><br>Defect reduction in mock-load validation cycles.     | <b>30 – 50%</b><br>Faster exception aging and adjudication cycle. | <b>100%</b><br>Audit coverage on every in-scope decision.         |

### 06 THE DATABRIDGE PILOT · 10 TO 12 WEEKS

|                        |                           |                       |                       |                      |                |
|------------------------|---------------------------|-----------------------|-----------------------|----------------------|----------------|
| Wk 1–2                 | Wk 2–4                    | Wk 4–7                | Wk 7–9                | Wk 9–11              | Wk 11–12       |
| Scope & Rule Alignment | Data Profiling & Baseline | Recommendation Engine | Adjudication Workflow | Mock-Load Validation | Scale Decision |

### 07 GOVERNANCE & GUARDRAILS

|                                    |                                                                                                                                                                              |
|------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>GOVERNANCE &amp; GUARDRAILS</b> | <b>Stewards approve every AI recommendation.</b> Commercial fields route to commercial owners, tax exceptions route to tax owners, and customer merges require steward sign- |
|------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

off. Least-privilege access and an enterprise AI environment protect data privacy. Every action is logged.