Sales Order Processing Automation

Features + Benefits ▶

IntelliChief
Paperless Process Management

Introduction

Companies that are paper based and manual in their processing of customer sales orders lack efficiency, control, and visibility. A paper environment results in high costs for storage and management of customer order documents. And the manual nature of processing these types of orders results in high cost of labor. Think about your process when a customer order is received. The steps of sorting and labeling orders, verifying for accuracy, performing data entry, pushing that order through all the internal steps you have that lead to order fulfillment all drive up the cost to process a single transaction. And all the while you will maintain communication with the customer as to the status of their order. Now consider what happens to your costs when an order is lost or misplaced, a data entry error occurs, or a change/revision to an existing order arrives. And the longer it takes to process an order, the higher your Days Sales Outstanding (DSO) will be.

With IntelliChief, your Sales Order process can be transformed to maximize efficiency, lower processing costs, mitigate risks, and increase visibility to customer POs. By capturing and archiving customer POs and PO data information in a secure centralized repository, and utilizing a workflow process that integrates all of these functions into your core ERP/order entry application you are able to get control of a process that is otherwise costly, lacks visibility and is difficult to manage. You will be able to provide an even greater level of service to your customers, and gain greater competitive advantages to help drive revenue for your organization.

The Sales Order Process

| Establish Customer Credit Limit | ▶ | Generate Sales Quote | ▶ | Create Sales Order | ▶ | Credit Management /Block Order | ▶ | Delivery Processing | ▶ | Issuance of Goods | ▶ | Billing |

"IntelliChief's paperless process management has enabled Stainless Foundry's production lead time to be reduced by 50%."

— Steve Cooke, VP of Sales & Marketing, Stainless Foundry

Capture

Sales Order processing with IntelliChief starts with the capture of customer purchase orders. Orders received by email, fax, or paper can be automatically imported or scanned upon receipt thus allowing your order processing team instant control, visibility, and access to information. And by capturing other documents related to customer orders (correspondence, acknowledgements, shipping documents and PODs, invoices, and payment) you will be able to build a complete electronic record of every customer transaction.

Beyond the capture of documents, IntelliChief's Capture Enterprise for Sales Orders solution allows for the extraction, verification, and validation of data on incoming customer POs. Through IntelliChief Capture Enterprise you automate the functions like indexing, data validation, and order entry. This will drastically reduce the cost of processing orders, reduce order fulfillment times, and reduce data entry errors. In addition, it will allow your order entry team the ability to focus on handling order exceptions, analytics, and providing extraordinary customer service.

Scan	Enhance	Read	Validate	Verify	Deliver
Emails	Remove Stains	Printed Text (OCR)	Look Up Information	Review	Create ERP Transaction
Faxes	Enhance Images	Checkboxes (OMR)	Compare With ERP	Confirm	Save To Archive
Paperwork	Identify & Classify	Barcodes	Calculate	Send To Appropriate Employee	Export XML
PDFs			Apply Custom Rules		Electronic Data Interchange

Benefits

- Eliminate Paper Filing and Storage
- Consolidate Related Documents
- Eliminate Information Silos
- Automate the Manually Intensive Order Entry Process
- Mitigate Data Entry Errors
- Reduce the Risk of Lost or Duplicate Orders

What Is Optical Character Recognition (OCR)?

OCR lets you convert traditional documents into searchable data. While a document scanner can create a digital replica of a paper image, an OCR program can take information off the image and use it for other purposes.
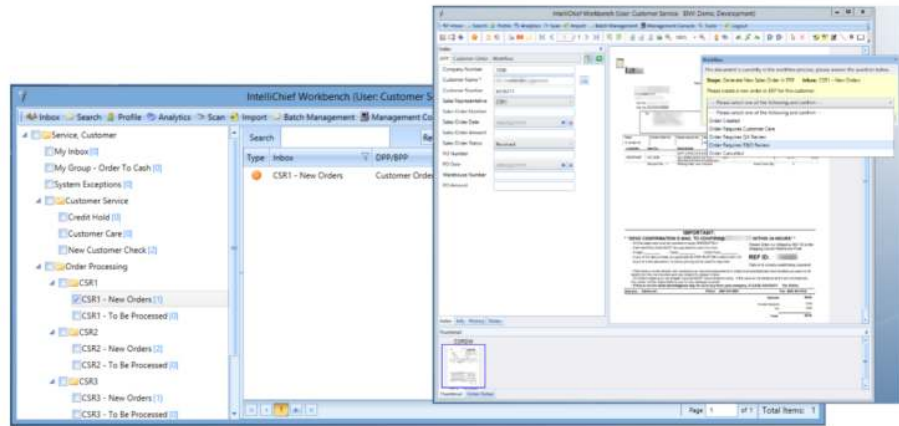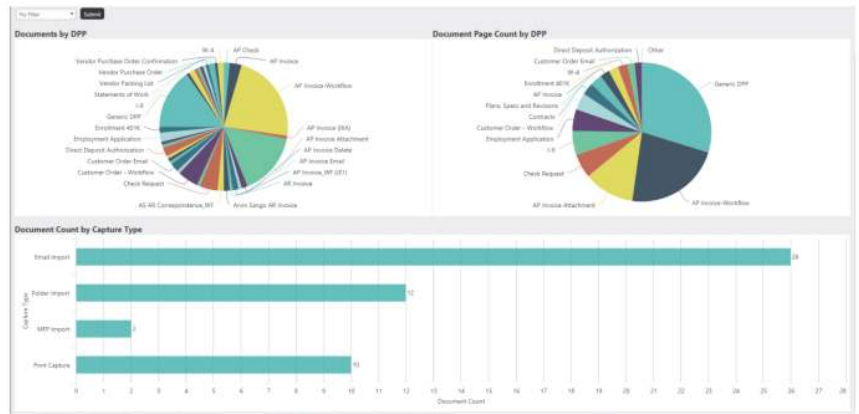
Workflow

Leveraging IntelliChief's powerful rules based workflow engine, customer POs can be routed between people, departments, and locations for the purposes of review, approval, processing, and exception handling. POs that are fully verified and validated can be processed "straight through" to order entry without needing to be touched. But POs that need further review or approval can be routed to those necessary within Sales, Customer Service, or other departments like Quality, Credit, or Accounting.

Complete with notifications, escalations, and audit logs, IntelliChief will ensure that business rules are adhered to while processing orders, even if the order needs to be escalated. Workflow provides the ability to see when an order was captured, viewed, routed, or approved with a full date/time/user stamp history.

And with IntelliChief Analytics, reports and dashboards are made available to those who need it, in real-time, to allow for data analysis and prompt decision making. In the paper world, order information not resident inside your ERP/order entry application is in fact outside your line of sight. But by capturing orders and their data at the beginning of the process and leveraging workflow automation, staff now have visibility to new and open orders, amounts, those under review, worker performance, and much more.

IntelliChief Workflow: Order routing for review, approvals, exception handling, and processing

IntelliChief Analytics: Real-time reports and dashboards for complete visbilibibity into the inner workings of your business

Benefits

- Eliminate Paper Filing
- Instant Tracking and Visibility
- Process Control
- Reduced Order Fulfillment Times
- Seamlessly Integrate Remote Workers

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Storage and Retrieval

The IntelliChief Archive is the basic foundation of the IntelliChief solution, as it serves as the secure, central repository for the electronic documents that you capture. Documents stored in the archive are secured based on a number of factors to ensure information is accessed by the permitted users. Beyond being able to see a document, or group of related documents, security extends down to the various permissions of each user. Functions like printing, emailing, annotating, and redacting can all be granted based on the role of the user.

With documents filed away in the IntelliChief Archive, they are able to be searched for and retrieved. Users have instant, real-time access to documents when they need to research a customer inquiry or provide sample transactions in audit sampling. From a robust search engine within the IntelliChief workbench, users can perform very broad or very specific searches for documents based on key data, data ranges, and more.

Through a single search, a Customer Care representative, Account Manager, or the VP of Sales can not only see an order in question but can at the same time drill down to any related document on the same screen at the same time without having to perform a new search or exit out of the existing window. And when preparing for an audit, the requested documents can quickly be retrieved and provided to an auditor electronically or as paper, without having to search through file cabinets or off site storage. Through a controlled user log in with limited access, you could even grant the auditor access only to the documents/information requested.

Benefits

- Eliminate Paper Filing Cabinets
- No More Offsite/Remote Storage
- Easier Compliance With Document Retention Policies
- Instant Access to Information
- Automatic Audit Preparation

What Criteria Can I Use to Search? 🔍

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Document Type
Date of Entry
Customer or Supplier Business Account #
PO #
Any Captured and Connected Data

Fast   **Secure**   **Reliable**

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Integration

The functions of Capture, Workflow, Storage, and Retrieval are all powerful components of the IntelliChief solution that are used to drive Sales Order process automation. But without Integration to the core ERP, Order Entry, and CRM applications used by the business as its system of record, a solution is not truly complete. Through various proprietary and comprehensive ERP-specific integration modules known as Integration Link and Import Link, IntelliChief becomes a natural extension of an organization's key systems instead of a separate disconnected silo of information. No-code in nature, and regardless of the application or its platform, whether it's on premise or cloud-based, IntelliChief will integrate for:

► Automatic and interactive look ups to Customer Master and other databases for the purpose of indexing, validating orders, and processing of customer orders

► Automatic capture and indexing of system/ERP generated customer documents such as Order Acknowledgements, Shipping Documents, and Invoices

► Automatic re-indexing of orders with information not present at the time of initial capture, such as Sales Order #

► Retrieval of a single document or group of related documents directly from any ERP order inquiry screen with a single key stroke or mouse click

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Benefits

- Direct Access to Core Line of Business Applications Data
- No-Code Integration
- Intuitive for the End User
- Protects Data Integrity
- Integrates Disparate Systems and Users
- Digital Audit Trail

Summary

Sales Order processing does not have to be a costly, inefficient, and manual environment. By implementing the IntelliChief solution for Capture, Workflow, Storage & Retrieval with full ERP integration, your organization can eliminate the paper storage and handling costs, reduce order fulfillment times and DSO, all while making more informed decisions off of analytical data otherwise not readily available. The benefits are too great to ignore.

IntelliChief is a scalable, Enterprise Content Management (ECM) solution. In addition to Sales Order Processing and the Order To Cash process, IntelliChief can be expanded into many areas/processes in an organization such as…

Accounts Payable, Purchase to Pay, Travel and Expense, Human Resources, and More…

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