Sales Order Processing Automation for ORACLE JD Edwards

Features + Benefits ▶

IntelliChief
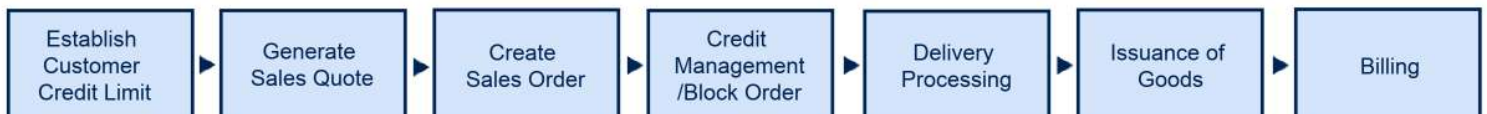Paperless Process Management

ORACLE Gold Partner

Quest Silver Partner 2020

Introduction

Companies that are reliant on paper-based, manual processing of 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 and must be keyed into JD Edwards (JDE). 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...they all drive up the cost to process a single transaction. And all the while, you will need to maintain communication with the customer to conirm 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. These issues drag out your process causing your Days Sales Outstanding (DSO) to spike.

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 digital repository and utilizing a workflow process that integrates all of these functions into JD Edwards, you are able to get control of processes that are costly, lack visibility, and are difficult to manage. You will be able to provide an even greater level of service to your customers and gain a distinct competitive advantage 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**

Sales Order Processing Automation for JD Edwards

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 in real-time. By capturing other documents related to customer orders (correspondence, acknowledgements, shipping documents and PODs, invoices, and payments) you will be able to build a complete electronic record of every customer transaction logged in JD Edwards.

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 eliminate 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 to ensure customer retention.

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

- Automate the Manually Intensive Order Entry Process
- Handle Any Complex Workflow, Including Made-to-Order
- Eliminate Paper Filing and Storage
- Consolidate Related Documents
- Eliminate Information Silos
- 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, such as eliminating the need for manual keying of data into JD Edwards.

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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 human intervention, and 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.

IntelliChief can handle complex, made-to-order workflows

Complete with notifications, escalations, and audit logs, IntelliChief will ensure that business rules are adhered to while processing orders via our industry-leading JD Edwards integration — 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 history.

With IntelliChief Analytics, reports and dashboards are made available to those who need it, in real-time, to allow for data analysis and prompt, informed decision-making. In the paper world, order information that isn't entered (or is entered improperly) into JD Edwards 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 as well as their amounts, review status, 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 visbilibibility into the inner workings of your business

Benefits

- Superior Control of All Workflows (i.e., MTO)
- Reduce Lead Time
- 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 for JD Edwards, 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, and JD Edwards is updated in real-time whenever an action is taken.

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. 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 offsite storage. Through a controlled user log in with limited access, you can even grant the auditor access only to the documents/information requested.

Benefits

Fast

- 1-Click Retrieval From JDE Inquiry Screen
- Automated Document Retention Policies
- No More Offsite/Remote Storage
- Instant Access to Digital Paper Trail
- Automatic Audit Preparation

Secure
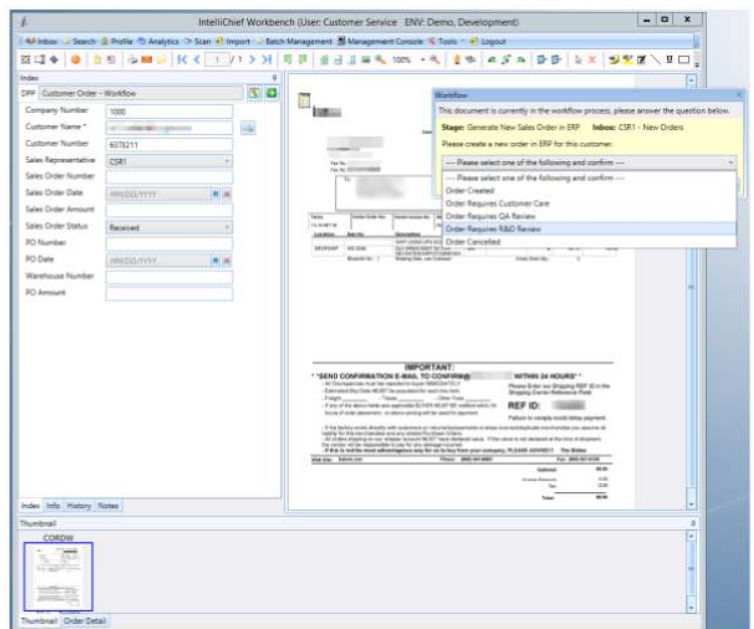
What Criteria Can I Use to Search?

▼

Reliable

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

Sales Order Processing Automation for JD Edwards

Integration

IntelliChief
Paperless Process Management

ORACLE
JD Edwards

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 a seamless Integration with JD Edwards, Order Entry, a solution is not truly complete. Through various proprietary and comprehensive JDE-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 by default and featuring the deepest JDE integration available, 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 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 your JD Edwards order inquiry screen with a single key stroke or mouse click

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Benefits

- Direct Access to JD Edwards Data
- No-Code Integration
- Intuitive for the End User
- Protects Data Integrity
- Integrates Disparate Systems and Users
- Digital Audit Trail

Summary

Sales Order processing automation does not have to be a costly, inefficient, and manual environment. By implementing the IntelliChief solution for Capture, Workflow, Storage, and Retrieval with full JDE integration, your organization can eliminate paper storage and handling costs, decrease order fulfillment times, and reduce DSO, all while making more informed decisions off of analytical data that would not be available otherwise. 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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