# **Cloud-based Order Automation**

Making it easy for businesses of all sizes to gain the advantages of automated sales order processing, Esker offers a best-in-class solution designed to minimize cost, time and IT resource requirements. Esker Sales Order Processing on Demand is delivered as a cloud service for quick deployment and fast results, offering robust functionality in an affordable solution.

# **How Esker Sales Order Processing on Demand Works**













## Order Receipt

Order is received and routed to a queue in the Web-based Document Manager.

- Inputs and file formats include: fax, email and Esker Loader with Microsoft Word, Microsoft Excel, TIF, JPEG and PDF attachments
- Easily create multiple views into the queue

## **Intelligent Capture & Full Text OCR**

Intelligent capture and optical character recognition (OCR) engines extract data from the image and retrieve data from customer and material master tables.

- Header data: customer name, customer number, PO number, PO date, subtotal, total and due date, ship-to and sold-to
- Line item detail: material number, description, quantity, unit of measure, unit price, line item total, due date and sales area

#### **Data Integrity Checks**

Multi-pass checks execute automatically upon OCR and order approval, providing an added layer of insurance that order information is correct before processing. For example:

- Is the material number valid?
- Is the customer name and number valid?
- Do subtotals add up to the PO subtotal (without tax & shipping)?
- Is this a priority or rush order?
- Consult Esker for a full list of data integrity checks

#### **Order Approval**

Orders can be saved for later processing, approved or forwarded for exception handling.

#### **Creation of XML File**

A file with all order data (Esker standard XML\*) and the order image are produced and made available for pickup and processing by the ERP system.

#### **Archive**

Images with key index fields are archived on the Esker on Demand platform or made available to a third-party archive.

\* Consult Esker for details.