

Order Management Automation

Goodbye data entry, hello efficiency

Esker Order Management uses AI technology to address the most repetitive, low-value areas of order taking all through one secure, centralized, cloud-based platform. Users can electronically process and track any email, EDI, fax, portal or mobile order with 100% accuracy, visibility and efficiency.

Why automate with Esker?



Process orders faster with automation technology that optimizes staff productivity and reduces costly errors.



Improve customer experience through faster fulfillment, improved communication and AI agent-supported self-service.



Increase visibility over entire order flow, regardless of source, enabling users to track, monitor and improve KPIs.



Enhance bottom line by reducing operational costs, increasing business agility and generating new revenues.

How it works

Esker offers a comprehensive solution that automates every phase of order management — from reception of an order to sending a shipping notice, through its creation in the ERP system — replacing the need for human data entry and helping employees work smarter, not harder.

1. Order reception & triage

All orders, regardless of type or format (email, fax, EDI, portal, etc.), are identified and routed to the appropriate queue for electronic processing.

2. Data extraction & validation

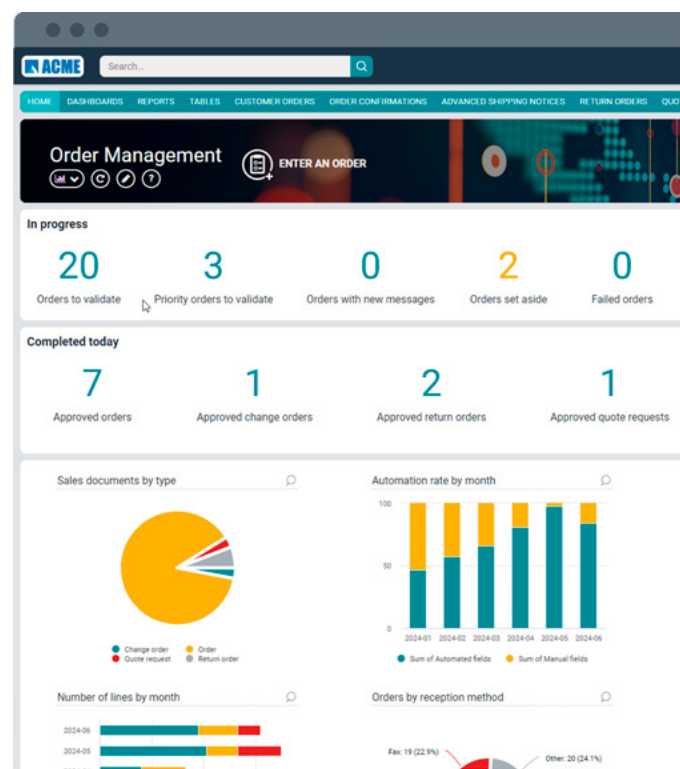
Different layers of AI-driven technologies accurately extract relevant data from orders, and verify it against the ERP master data, identifying potential anomalies.

3. ERP integration & archiving

Orders are automatically created in the ERP and archived for as long as specified, while a full audit trail of every touch point reveals who did what, when and where.

4. Order confirmation

Order confirmation and shipping notices are sent back from the ERP to customers, according to their preferences (email, portal, EDI, etc.).



Solution features

Esker's 40+ years of field experience and dedication to product development is the key to continued innovation. Some of the most prominent features of the solution include:



Email classification

Esker Order Management embeds a classification AI engine that leverages Natural Language Processing technologies to automate the identification of orders among other inquiries in an email flow and their routing to further order processing.



Advanced AI capabilities

Esker Order Management streamlines order data extraction and verification, eliminating the need for manual entry. The solution provides best-in-class automation thanks to Esker Synergy deep learning neural network that accurately identifies key information on first-time orders. Its auto learning capabilities ensure that the solution automatically learns from user corrections and continuously improves.



AI agent-supported self-service

Esker Synergy Agent enables intuitive self-service for B2B ordering, allowing customers to easily find the right products and place orders directly through the portal. Available 24/7, this AI-powered assistance simplifies the entire purchasing journey, increases customer autonomy, reduces CSR workload and delivers a smoother buying experience.



Dashboards & analytics

Esker Order Management is equipped with intelligent dashboards that display live, visual analytics (how many orders or priority orders are in the queue or set aside, automation rates, processing times, etc.). This feature is fully customisable so that users can choose what they want to see and track.



ERP integration

Esker Order Management integrates with any ERP system via APIs and/or flat files, and includes standard connectors for SAP® and Oracle® EBS. Esker can also provide simultaneous integration with multiple ERPs, simplifying diverse environments resulting from M&A activity.



EDI order processing

Esker enhances EDI order processing by bringing greater visibility, flexibility and autonomy to Customer Service. By converting machine-readable orders into clear, human-readable formats, customers using standard EDI formats (EDIFACT, X12, UBL XML, IDoc, etc.) can be onboarded instantly. This approach also makes EDI exceptions easy to manage, without IT complexity or added overhead.



E-commerce & mobile ordering

Esker's convenient e-commerce webshop allows customers to easily place and track orders directly from the website or from their procurement application through the PunchOut protocol, while the Esker Anywhere™ mobile application gives field sales teams the freedom to do the same while on the go. Esker Order Management offers one interface for all orders, regardless of reception channel or format: fax, email, EDI, as well as e-commerce portal and mobile orders.



Collaboration & communication

Before fulfilling orders, Esker enables CSRs to easily clarify them with internal departments (sales, logistics, credit, etc.) and with customers via tracked conversations linked to orders.



Confirmation delivery

In addition to automating order creation in the ERP, Esker also sends order confirmations and advanced shipping notices back to customers. These are automatically formatted according to the customer's reception preferences (email, portal, EDI, etc.). To close the order-to-invoice loop, e-invoices can also be sent in a similar manner.

Ready to automate more of your Customer Service?

Order management is only one piece of the customer service puzzle. CSRs also handle inquiries and resolve claims. Esker's Customer Service solution suite automates routine tasks across customer requests, orders and claims, freeing up the Customer Service team to focus on higher-value work while delivering an exceptional B2B customer experience.

