

ORDER MANAGEMENT

BUYER'S GUIDE

12 QUESTIONS FOR MAXIMISING YOUR ORDER
MANAGEMENT AUTOMATION INVESTMENT



PURPOSE OF THIS BUYER'S GUIDE

Looking to automate your order management process? Most businesses understand the purpose of order processing automation but could use guidance on the assortment of features and choices. This buyer's guide arms you with the knowledge you need to select the most cost-effective and well-suited solution for your organisation's order management requirements.

Esker has developed 12 essential questions to ask any potential solution provider — and the answers you should expect — to make your decision-making process easier and project outcomes successful.

WHY AUTOMATE ORDER PROCESSING?

PURPOSE OF THIS BUYER'S GUIDE

As companies seek new ways to increase efficiency and gain a competitive edge, order processing has emerged as an area ripe for improvement. The ability to quickly process, ship and access orders and is at the core of an automation service model, with benefits that include: reduced operational costs, accelerated order processing time, eliminated manual data entry, and improved accuracy and visibility. Symptoms of inefficient order management include:



Limited control & visibility



High error rates & incorrect shipments



Difficulties retaining talent



Missed customer SLA



High cost per order



Customer dissatisfaction

Manually processing sales orders is inherently labour-intensive, time consuming and error-prone, requiring valuable resources to manage each part of the process. When using conventional methods, it can take hours to receive, enter and archive a sales order. Reducing the time it takes to turn an order into money offers strategic benefits to the company while strengthening customer relationships.

BASED ON ESKER'S EXPERIENCE, COMPANIES LEVERAGING ORDER MANAGEMENT AUTOMATION CAN:

- Process orders 80% faster
- Reduce manual order processing errors by 70%
- Achieve 100% visibility and improve entire order management process
- Cut processing costs by 70%
- Increase employee satisfaction and talent retention
- Improve the customer experience

12 QUESTIONS
FOR MAXIMISING YOUR
ORDER MANAGEMENT
AUTOMATION INVESTMENT

END-TO-END ELECTRONIC PROCESSING

“We would like to eliminate as much manual processing & human intervention as possible. Does your solution deliver a completely electronic order automation process?”

Order processing runs most efficiently when human intervention and manual tasks are minimised. Your vendor should provide a solution that ensures orders are automatically verified (via predefined criteria), complies with business and audit policies, and enables a fully electronic processing environment where limited manual data entry is required.



WHY ESKER?

Esker offers a comprehensive solution that automates every phase of order processing — from the reception of an order to its creation in the ERP/business application — replacing the need for any human data entry and dramatically reducing your order processing labour costs. Esker processes and tracks any order with complete accuracy, visibility and efficiency.

ORDER RECEPTION → DATA EXTRACTION → ERP INTEGRATION → E-ARCHIVING

DASHBOARDS & METRICS

“It’s important that we keep an eye on the pulse of our business. Are you able to provide control & visibility into overall order management performance?”

Your provider’s solution should offer packaged key performance indicators (KPIs) and dashboards that provide real-time visibility and other analytical tools. This type of enhanced control and monitoring makes it easier for everyone involved to perform daily tasks, monitor performances, analyse areas of improvement and allocate resources and workloads.



WHY ESKER?

Esker dashboards enable you to facilitate daily tasks, monitor performances and react quickly to prevent problems or spot opportunities early, making every action smarter and more strategic. The dashboards are customisable so that users can choose what they want to display and to which user or profile. Users of Esker dashboards can easily: see how many orders have been approved and how many are still awaiting approval; measure long-term performance; monitor automation rates and processing times; gain insight on team capacity; review sales activity and trends; even on the go.



CUSTOMER COLLABORATION

“How can we facilitate communication between our CSRs & customers, as well as provide our customers with more autonomy in managing their order process?”

Your provider's order processing solution should include an open line of communications, which simplifies exchanges when clarifying orders and removes the hassle of keeping your customers up-to-date on their order status. Additionally, customers should be able to place and track their orders directly online via a portal, thereby accelerating the order processing time.



WHY ESKER?

Esker provides a single platform where teams can collaborate, gather and evaluate information, and work within. Esker's customer portal and mobile application, Esker Anywhere™, gives both customers and sales staff the freedom to place and track orders. CSRs can easily collaborate with customers to clarify their orders. Conversations are automatically attached to the corresponding order and archived with it.

EDI ORDERS

“We receive orders in all formats, including EDI. We still want to let our customers maintain their delivery preference — can your solution handle any EDI standard & manage EDI-related errors?”

Your solution provider should be capable of efficiently processing all received orders, including fax, email, paper, web, mobile and EDI. EDI allows companies to exchange information electronically directly from machine to machine. Through the use of structured and standardised files, orders can be created in the ERP directly, without human intervention. In theory, EDI order processing should be perfect — it isn't. Orders may arrive in the proper format, but the item details may be incorrect (e.g., reference, address, price, etc.) and difficult to correct, resulting in order mistakes, customer dissatisfaction and lost profit. Your solution provider should be able to process all EDI orders, including those with exceptions, with the same business rules used for email or fax orders, while maintaining visibility over the flow of EDI orders.



WHY ESKER?

Esker addresses the problems of manual order processing on your end by turning every order electronic, and in turn, still allowing your customers to send orders in any way they choose: fax, email, EDI or even paper. Esker brings visibility and agility into your EDI process by allowing users to apply the same business rules to all orders – no matter the order channel. For example, anomalies can be automatically detected based on a customer's order history and prevent an order with unusual and potentially incorrect quantities from being automatically created in the ERP system. By turning a machine-readable order into a human-readable version, anyone can check any order and EDI exceptions can be managed easily without the IT hassle.

Businesses achieve end-to-end visibility, thanks to Esker's centralised platform and built-in solution dashboards, users can access valuable data previously lost in the technical weeds of EDI.

Esker EDI Services can further elevate your EDI performance by simplifying the setup or migration of EDI connections with partners or networks.

ELECTRONIC ARCHIVING

“We want to e-archive our orders to avoid storing mounds of paper. Will we be able to access our documents easily?”

Your solution provider should be able to automatically archive your orders electronically. There are no legal requirements to keep a paper copy of your orders, allowing you to eliminate the time-consuming responsibilities of manual filing and paper storage. Additionally, orders should be backed-up with security offered by your solution provider's infrastructure and always accessible to authorised personnel from any location for as long as you choose.



WHY ESKER?

With Esker's powerful multi-criteria search engine, you only need to enter one or more search criteria in the web interface, and your order is quickly identified. Orders can easily be pulled up in the event of a customer claim and auditors can easily access an order corresponding to an invoice. Orders are always accessible to any authorised personnel from any location for as long as you need them, and access to your document is secured using advanced login security policies. A backup of your archive is always available and a digital media copy can be requested.

ACCURATE & INTELLIGENT DATA CAPTURE

“How does your recognition technology accurately identify content from different order formats & do we need to set up a template for each order layout?”

Your solution provider should deliver intelligent data capture or recognition tools to speed up the automation process and provide better accuracy and security for order processing. To ensure accurate processing and minimise human intervention, your solution provider's recognition technology must be able to accurately extract all relevant information from orders regardless of the format (e.g., EDI, scanned image, fax, email, etc.) and scale.



WHY ESKER?

Built on a set of technologies designed to mimic human intelligence, Escher's Artificial Intelligence (AI) Engine can manage and analyse both structured and semi-structured order data by matching it against ERP master data. For example, Escher Synergy technology has the ability to recognise fax and email orders received for the first time by identifying a matching layout in the network using deep learning mechanisms typically applied to facial recognition. Machine learning then comes into play to ensure that the system automatically learns from user corrections. Escher's technology allows users to benefit from high recognition rates from day one, which increases over time as the solution learns by itself.

ERP INTEGRATION

“Will your solution integrate with our ERP/business system?”

Implementing an automation solution should not require additional costs for custom development. If your order management solution does not work with your current ERP/business system, the payoff will take longer, coupled with a higher total cost of ownership (TCO). Ideally, you want a solution that's compatible with a wide range of ERP/business systems, is configured to address the unique needs of any business, and easily integrates with your current infrastructure.



WHY ESKER?

With 70+ unique ERP or home-grown solution integrations to date, Esker's integrated cloud platform provides multiple services and business packages to automate complex business processes and orchestrate actions across departments.

Esker's Order Management solution has standard connectors for SAP ECC, SAP S/4HANA and Oracle® EBS. Live connection via web services allows users to check prices, availability and more when processing orders. Esker also provides simultaneous integration with multiple ERPs, simplifying diverse environments resulting from M&A activity.

INFORMATION SECURITY & INTEGRITY

“How can we be confident that our business documents will be securely handled & stored?”

Hosting and processing other companies' business and financial documents brings up the question of internal controls and security issues. The Statement on Standards for Attestation Engagements (SSAE) No. 18 and the International Standard on Assurance Engagements (ISAE) 3402 are reporting standards that analyse a service organisation's control (System and Organisation Controls (SOC) compliance) over information technology and related processes. A successful audit completion indicates that processes, procedures and controls have been formally reviewed.



WHY ESKER?

Esker completed its SOC 1® Type 1 examination in 2012, and SOC 1® Type 2 examination in 2014, by A-lign, an independent, third-party auditor, in order to enhance the level of security and assurance it provides to all its on-demand customers. SSAE 18 and ISAE 3402 standards validate the quality and integrity of Esker's internal control processes and procedures for on-demand customers and address the rules of internal control outlined in the Sarbanes-Oxley Act legislation.

Esker has achieved ISO 27001 certification for its Information Security Management System (ISMS) of on demand services. Customers using Esker's cloud solutions can be confident their data is safe, properly controlled, and that security best practices are in place.

Consistent with its pledge to protect personal privacy, Esker has been certified by TRUSTe, an independent third party online privacy solutions provider.



BUSINESS CONTINUITY

“We can’t risk delays in business processes or the chance of losing critical information. Do you commit to delivering business continuity, particularly in challenging times?”

Documents must be transmitted in a timely fashion with a redundant, always-on and backed up infrastructure so that information is handled in a secure, confidential and traceable manner. Your solution vendor should make crucial business functions available to customers and suppliers at all times, even when working remotely. This is particularly true today as more companies make the necessary transition to a remote workforce.



WHY ESKER?

Esker represents an essential critical infrastructure that enables businesses to remain operational during times of unprecedented change. Esker’s cloud-based platform with 24/7 availability is not location dependent and enables support to all customers, suppliers and partners from remote environments.

Esker’s Business Continuity and Security teams have well-established support plans in place to give customers peace of mind. Two independent operational centres in different locations continually monitor the operational continuity of Esker’s platform. Esker brings together both physical and virtual infrastructure to offer the highest levels of security, flexibility and performance to help organisations protect their confidential information at all costs.

Regarding order management specifically, critical commitments must be upheld — the right orders still need to get to the right customer at the right time — Esker’s flexible solution and services mean that customer service departments can easily continue managing customer interactions from home.

ONE PLATFORM FOR ALL CUSTOMER INTERACTIONS

“Today we’re in the market for an order management solution, but tomorrow we may need to automate other customer processes — can you support our growing business needs?”

Your solution provider should provide all the technology, solutions, service and support needed to respond to your expanding needs. That means having the capability to address the full order-to-cash cycle (O2C), not just order processing.



WHY ESKER?

Esker’s O2C solution enables businesses to seamlessly manage all customer interactions through a single, centralised solution. From credit to order management to customer e-invoicing, collections, payment and cash allocation, Esker provides users with an integrated, end-to-end platform to drive added value and efficiency in every phase of the O2C cycle.

Esker’s Customer Management helps your business obtain a 360° view over your customers’ behaviours in one integrated platform. By providing real-time visibility into every customer account situation via an intelligent dashboard and KPIs, users benefit from simplified performance monitoring and easier issue identification and resolution.



EXPERT CONSULTANCY & PROJECT METHODOLOGY

“Will our solution will be implemented on time & within budget?”

To get the greatest amount of business value in the shortest amount of time, you should be afforded a high level of involvement early in the planning and throughout the project. A skilled solution provider with years of solution implementation experience understands the importance of respecting timelines and budgets.



WHY ESKER?

Esker's use of Agile methodology minimises project delays and gets customers to their desired destination -- go-live -- as quickly as possible. Stakeholders are actively involved throughout the process and achieve maximum value in every phase of solution delivery.

As opposed to the traditional “waterfall” approach, Agile methodology enables decisions to be made with context, invests resources in the most value-added features, and allows solution features to be tested and used in a short amount of time.

GLOBAL PRESENCE

“Can you support our multiple offices & multi-language needs? As a global company, we need to be sure your solution can be scaled out.”

In today's global marketplace, companies need an international solution provider who can support their automation needs across a network of offices around the globe, offer multi-language capabilities and have proven, cross-border deployment successes.



WHY ESKER?

With offices around the world, Esker operates globally and has a track record of many successful worldwide implementations. Esker's on-demand platform allows for a rapid solution rollout to various countries without the need to plan for multiple instances or larger, more complex infrastructure. Esker's web interface is available in seven languages (English, French, Spanish, German, Italian, Chinese, Japanese), technical support is available in five languages and OCR is available in over 130 languages for order documents.



ESKER'S ORDER MANAGEMENT SOLUTION

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

WHY AUTOMATE WITH ESKER?

- **PROCESS ORDERS FASTER**
with automation technology that optimises staff productivity & reduces costly errors
- **INCREASE VISIBILITY**
over entire order flow, regardless of source, enabling users to track, monitor & improve KPIs
- **IMPROVE CUSTOMER EXPERIENCE**
through faster fulfillment, improved transparency, self-service & collaboration tools
- **ENHANCE BOTTOM LINE**
by reducing operational costs, increasing business agility & generating new revenues

HOW IT WORKS

Esker offers a comprehensive solution that automates every phase of order management, from reception of an order to its creation in the ERP system.

1 - ORDER RECEPTION

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

2 - DATA EXTRACTION

Different layers of AI-driven technologies accurately extract relevant data from orders, no matter if they are text or image-based documents.

3 - ERP INTEGRATION

Once the order data is verified against the replicated master data, the corresponding sales order is automatically created in the ERP.

4 - E-ARCHIVING

Orders are e-archived and linked back to the ERP for as long as specified, while a full audit trail of every touch point reveals who did what, when and where.

REAL RESULTS ACHIEVED BY OUR CUSTOMERS



“Ultimately, we found that automation could help us provide higher quality customer care and faster turnaround time versus simply hiring more staff. And, the ability to grow as a company without growing our team was big for our bottom line.”

DIRECTOR OF CUSTOMER EXPERIENCE | PARTS TOWN



“A specific feature that has been well received by our customer service team is the ability to quickly and effortlessly retrieve archived sales orders. This not only saves time, but it also provides a higher level of service to our customers by being more flexible and responsive.”

HEAD OF CUSTOMER SERVICES EUROPE | GE HEALTHCARE



“Esker allows us to be very accurate with our orders, which is important to us. Customers are receiving their orders faster and we are spending less time processing them and correcting errors. Everybody wins.”

BUSINESS ANALYST | IPC GLOBAL SOLUTIONS



“We have reduced the number of order entry errors due to manual handling and sped up our processing times. As a result, we have been able to invest more time on higher-value tasks, which has led to an increase in customer satisfaction.”

ORDER MANAGEMENT MANAGER | HEINEKEN SPAIN



Accord Healthcare reduced time to process an order, from 3 minutes to 33 seconds and has freed up 190 hours per month, enabling CSR teams to spend more time on higher-value tasks



Cerpadics processes 59% more orders without staff increases



Garcia Carrion boasts 99% order entry accuracy rate

ABOUT ESKER

Esker is a worldwide leader in AI-driven process automation software, helping financial and customer service departments digitally transform their procure-to-pay (P2P) and order-to-cash (O2C) cycles. Used by more than 6,000 companies worldwide, Esker's solutions incorporate AI technology to drive increased productivity, enhanced visibility, reduced fraud risk, and improved collaboration with customers, suppliers and internally.

GLOBAL EXPERTISE

Founded in 1985, Esker operates in North America, Latin America, Europe and Asia Pacific with global headquarters in Lyon, France, and U.S. headquarters in Madison, Wisconsin. In 2019, Esker generated 104 million euros in total sales revenue.





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