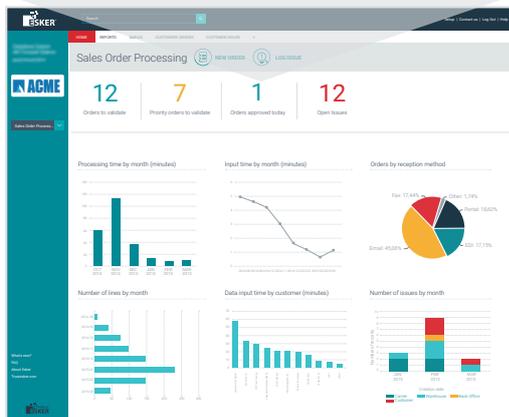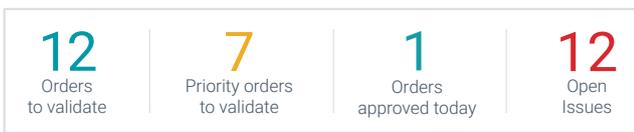# ORDER PROCESSING AUTOMATION:
Understanding Why and How
Esker's Cloud-Based Solution Is Used

As companies seek new ways to increase efficiency and gain a competitive edge, order processing has emerged as a business process brimming with added value and untapped potential. The faster orders can be processed, shipped and accessed means increased customer satisfaction, reduced operational costs, and improved accuracy and visibility — all common benefits that are achieved using Esker's cloud-based automation solution.

Key Benefits of Automation

Based on Esker customer results, typical benefits achieved by organisations using Esker's Order Processing solution include:

- Up to 80% faster order processing speeds
- Data entry accuracy rates of over 99%
- Return on investment realised in 3-6 months
- Up to 70% lower order-to-cash processing costs
- Increased staff productivity as much as 65%
- Order delivery times cut from several days to same day
- 100% visibility into order/issue management via a full audit trail and KPI dashboards for monitoring and reporting
- Strengthened customer service
- Improved customer satisfaction rates thanks to automation of issue management workflows

Order Processing Challenges

Processing orders the traditional way involves multiple manual touch points that can cost companies unnecessary amounts of time and money. These types of outdated paper-based methods are also a source of errors that can directly affect customer satisfaction as well as supply chain efficiency.

Using Esker's Order Processing automation solution, companies can address typical manual challenges including:

Visibility

Multiple manual touch points and numerous order viewing sources result in limited visibility into orders being processed, slower processing times, and lower efficiency, predictability and profitability.

Productivity

Multiple steps of keying-in, distributing, filing and retrieving paper orders slows down processing and consumes CSR time that could be assigned to more valuable and customer-focused tasks.

Errors

In Esker's experience, reprocessing a single order due to data entry errors or misplaced documents can inflate the average cost of processing by as much as 4 to 5 times the standard cost.

Costs

Because documents need to be printed for manual entry into the ERP system, an infrastructure of printers and fax machines must be maintained. This, coupled with the cost of potential errors, late invoices and the administrative work required can get very expensive.
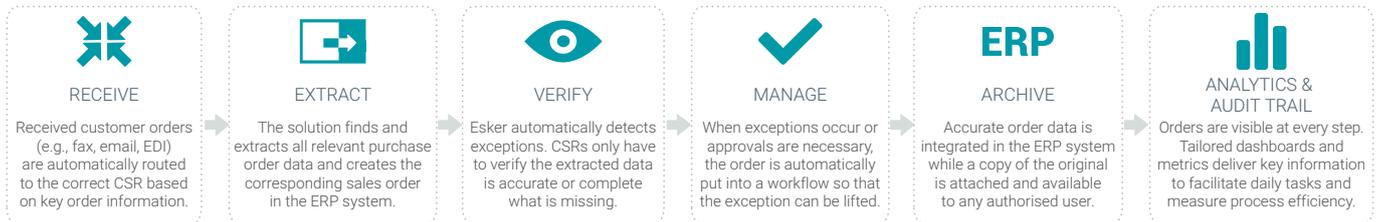
Customer satisfaction

The reputation of a company, and the company brand itself, can be negatively affected by claims that are poorly managed. Responding to customer issues in a timely manner can be difficult when using manual tools to process and monitor customer claims.

Deployment

Historically, companies have focused on automating transactions with large business partners, using EDI for only a small portion of their business. However, this leaves out many smaller trading partners — and leaves a lot of money on the table.
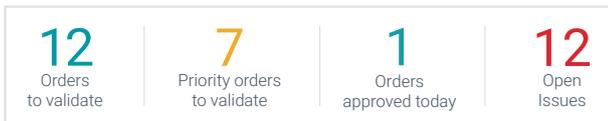
Inside Esker's Solution

Esker automates every phase of order processing — from the reception of a customer document to the creation of a corresponding sales order in the ERP system — minimising the number of manual touch points, IT resource requirements, and overall time and costs.

RECEIVE
Received customer orders (e.g., fax, email, EDI) are automatically routed to the correct CSR based on key order information.

EXTRACT
The solution finds and extracts all relevant purchase order data and creates the corresponding sales order in the ERP system.

VERIFY
Esker automatically detects exceptions. CSRs only have to verify the extracted data is accurate or complete what is missing.

MANAGE
When exceptions occur or approvals are necessary, the order is automatically put into a workflow so that the exception can be lifted.

ERP ARCHIVE
Accurate order data is integrated in the ERP system while a copy of the original is attached and available to any authorised user.

ANALYTICS & AUDIT TRAIL
Orders are visible at every step. Tailored dashboards and metrics deliver key information to facilitate daily tasks and measure process efficiency.

How it works

Esker takes the pain out of traditional order processing by removing all manual touch points. Using advanced automation functionalities and no predefined templates, each order is completely electronic, highly secure and fully visible throughout its entire lifecycle.

This allows companies to see when a particular order comes in, where it is in the system, who has it and what the next steps are. Additionally, it shortens the processing cycles, reduces the number of lost, incomplete or incorrectly entered orders, and helps companies quickly resolve customer issues.

Date/time submitted	Customer number	Priority ⌃	Customer name
6/25/2015 10:22:39 AM	1671	Immediate	Computer Club Market
6/25/2015 10:22:19 AM	1671	Immediate	Computer Club Market
6/25/2015 10:22:32 AM	3176	Normal	Computer 3000
6/25/2015 10:22:46 AM	1002	Normal	Omega Soft-Hardware Markt
6/25/2015 10:22:40 AM	1671	Normal	Computer Club Market
6/25/2015 10:22:49 AM	300712	Normal	Milton & Milton

12 Orders to validate

7 Priority orders to validate

1 Orders approved today

12 Open Issues

With 100% electronic order handling and processing, the need for manual data entry is eliminated and transactional excellence can be achieved.

- **Respond to inquiries faster and improve collaboration:** With immediate access to documents, CSRs are able to quickly and answer order status inquiries and maintain good customer relationships. And, thanks to collaboration throughout the customer portal, customers can chat directly with their CSR to clarify or ask questions.

- **Measure efficiency and accurately forecast:** Through the use of dashboards, orders are visible at all times and reports can be run to monitor valuable KPIs. Managers have enhanced visibility into the process, making it easy to identify areas of need and allocate resources.

Improved Resource Management

Along with freeing up staff to spend more time on customer service activities, automated order processing gives companies more control and insight into what is happening on a daily basis, resulting in:

- **Time savings:** Automated handling and routing enables companies to quickly process an order and save time.

- **Cost savings:** An automated solution reduces operation and administration costs, eliminating equipment and supplies and enabling the re-allocation of half the staff who previously managed manual processing.

- **Fewer errors:** By limiting touch points and human interaction, errors and reprocessing costs are reduced. The solution identifies any duplicate orders, and by doing so, eliminates duplicate entry, and shipping
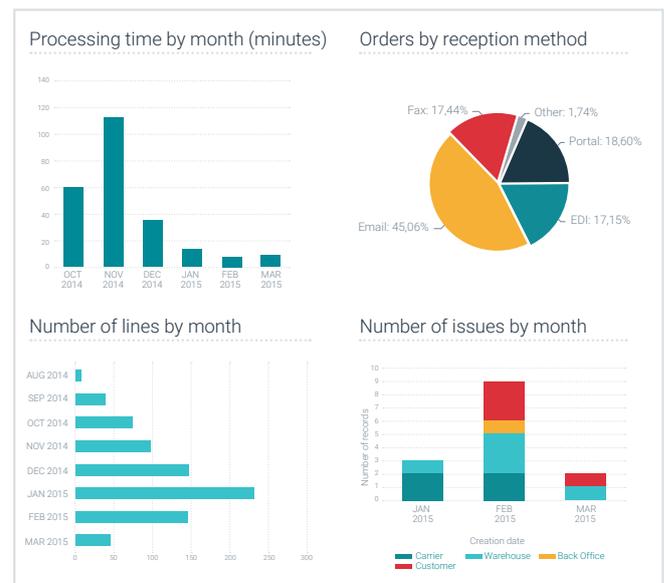
Better Customer Care

Order processing automation also helps organisations more effectively address customer needs and overcome pressure from competitors by being able to:

- **Prioritise urgent orders:** When orders come in, priority clients are recognised at once and companies are able to immediately address their needs. The risk of missing important orders is nonexistent.

Processing time by month (minutes)

Orders by reception method
Fax: 17,44%   Other: 1,74%   Portal: 18,60%   EDI: 17,15%   Email: 45,06%

Number of lines by month
AUG 2014, SEP 2014, OCT 2014, NOV 2014, DEC 2014, JAN 2015, FEB 2015, MAR 2015

Number of issues by month
Number of records
JAN 2015, FEB 2015, MAR 2015
Creation date
Carrier, Warehouse, Back Office, Customer

- **Deal with customer issues quickly.** CSRs can log, track and manage all claims in the same interface as their customer orders — improving efficiency by streamlining and truly automating issue management workflows.

Esker Solution Methodology

Cloud-based implementation

Esker offers the flexibility to allow businesses to easily deploy their automation solution according to their unique needs. Because all of the functionality is built into a single, collaborative platform, solutions can be implemented quickly with minimal upfront costs and without disrupting current processes.

Requiring nothing more than an Internet connection and web browser (i.e., no additional hardware, software or maintenance investments), Esker's on-demand offering is specifically designed to help customers avoid lengthy deployment cycles. Pre-built integrations can quickly solve 80-90% of typical order processing issues.

Agile and Change Management

Esker's solutions are implemented using Agile methodology and Change Management practices. This type of collaborative and phased approach allows users to get hands-on solution experience early on in incremental stages while also being more receptive to procedure changes once the solution is in place.

Benefits of Agile and Change Management include:

- Gaining the benefits more rapidly with faster ROI
- Ability to make decisions with context and experience
- Quickly receiving new features to test
- Direct involvement in the project; greater process insight
- Investing resources in the most valuable features
- Reducing risks and lowering overall startup costs

ESKER®
Document Process Automation

Esker Document Automation Asia Pte Ltd
47 Scotts Road — #05-04
Goldbell Towers
SINGAPORE 228233
Tel: +65 (6735) 6882 — Fax: +65 (6826) 4374
info@esker.com.sg — www.esker.com.sg

Esker Document Automation (M) Sdn Bhd
L3-I-5, Enterprise 4 — Technology Park Malaysia
Lebuhraya Puchong — Sg.Besi, Bukit Jalil
57000 KUALA LUMPUR, Malaysia
Tel: +603-8996 8088 — Fax: +603 2178 4775
info@esker.com.my — www.esker.com.my

Get Social

Visit our blog!
blog.esker.com

SS-EOD-SG-018-E