**Data Sheet**

# Sales Order Automation Solutions

## No touch sales order automation

## Solution overview

**While trading with your customers electronically (EDI) will give you the best results your organisation will still receive many sales orders via email.**

B2BE's Sales Order Automation solution is an OCR, AI based solution that digitises the sales orders so they can be automatically integrated into your ERP or business system in the same way and EDI order is.

The Sales Order Automation solution is highly configurable to allow AI based automation combined with workflows to manage data and the validation ensuring what you receive electronically will not create issues in your system, and if it will you can be notified in advance.

## Key Features

### AI learning
The Sales Order Automation solution uses AI as part of the OCR data capture process which means where issues are identified the system learns so if your customers send or create the same issue on a sales order the system will automatically pick this up to ensuring the data can be accurately captured.

## Validation and workflows

The Sales Order Automation solution, while using OCR and AI based technologies, can also be setup to validate the data within the sales order when it is in electronic form. Validation rules can be set within the workflow and any data related issues created by your customer can be identified and rectified before the sales order is integrated into your ERP or business system. Rectification may mean fixing the issues or rejecting it to the customer where there's fundamental issues.

## Access and usability

The Sales Order Automation solution is available via the Order to Cash Portal which also houses all your workflows, documents and much more and as a cloud based solution it means it's easy to use, easy to grant access to, or not, and full audit trails and management reporting is available to ensure sales orders are being managed more efficiently.

## Visibility

All sales orders are highly visible as they pass through the B2BE Sales Order Automation solution. The files that were received, PDF's and on-sent electronically files sent to your organisation are available via the Order to Cash Portal and available historically. Where the sales order is linked to a O2C solution it can be linked to other documents in the transaction set to make it easier to see all the moving parts and for different parts of your organisation. Link invoices and POD's, for example.

## Address API validation

If your organisation has customers which you manage a lot of direct shipments for the shipping address changes on each sales order. Transport companies rely on the address to be accurate so B2BE can validate shipping addresses, or any address for that matter, as the sales order passes through the system to auto rectify or identify issue addresses using Google's address validation API.
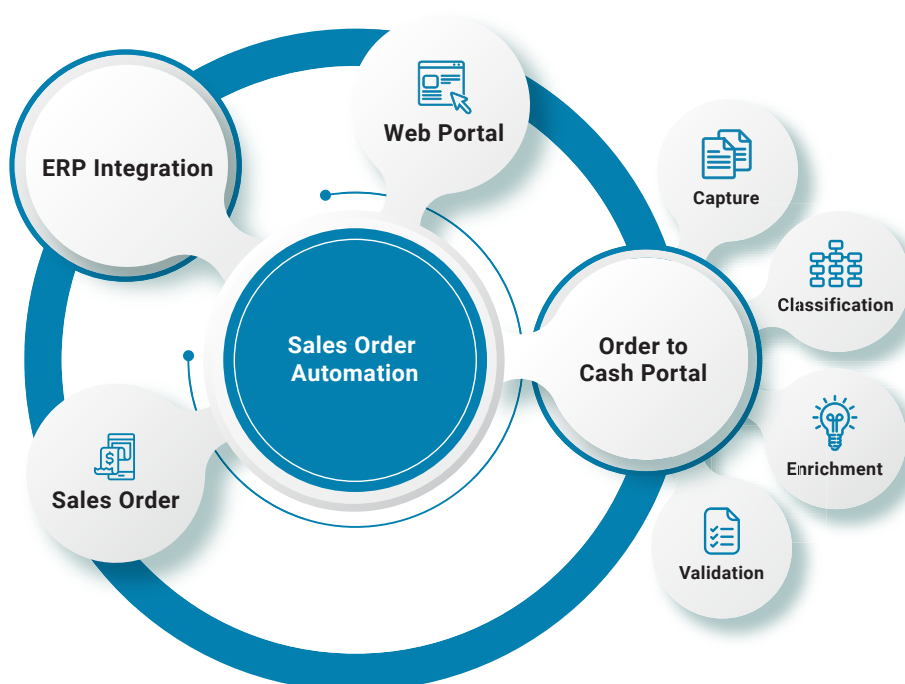
# What can you achieve with B2BE's Sales Order Automation solution

**Multi channel sales order management**

If you use the B2BE Sales Order Automation solution combined with a Document Management solution, specifically EDI, for example it means that all your sales orders will arrive via the same channel and the same rules and processes will apply making it much easier for customer services teams to manage and process sales orders.

**Error reduction and automation**

When applying both AI logic and validation via B2BE's document validation workflow means issues can be identified automatically so your customer services teams will only need to manage exceptions and they can get on with servicing clients and being pro-active rather than re-active or at worst administrators

**Confidence rules**

Some information is more important than other information. For example item codes and prices are very important whereas the terms and conditions less so. The sales order automation solution can be configured to capture what your system needs and confidence levels can be set in the OCR software so data that creates an issue can be identified quickly.

**Reporting**

The sales order automation solution has a range of reports to understand the health of the system and solution, report of throughput and volumes and provide snapshot information. Similarly errors or certain rules can also trigger automated emails and alerts so you have the right information at your fingertips at anytime.