

# DocStar® ECM Sales Order Automation



## Product

DocStar® ECM  
Sales Order Automation

## Benefits

- ▶ Reduce overall costs
- ▶ Improve transaction efficiency
- ▶ Achieve measurable efficiencies
- ▶ Enhance accountability
- ▶ Accelerate business processes
- ▶ Improve fulfillment speed
- ▶ Eliminate transposition errors
- ▶ Avoid losing or misplacing orders

## Key Features

- ▶ Intelligent data collection and data mapping
- ▶ Workflow for order handling, validation, and issue resolution
- ▶ Integration with ERP
- ▶ Customer credit hold checking
- ▶ Duplicate sales order checking
- ▶ Part number /item validation
- ▶ Secure storage for permanent archiving
- ▶ Documents screen to indicate what is supposed to happen to the document
- ▶ Demand screen that is designed for order entry
- ▶ Drag and drop attachments to emails that will get “scanned” into the system through an OCR application

## Adding value to your business, productivity to your process, and profit to your bottom line

Faster. Smarter. Cheaper. Business today is more competitive than ever. Does your business have the tools to keep up?

Sales order entry is part of nearly all manufacturing operations, setting the tone if not the speed for the entire process. Too often, sales order entry is done manually, which is labor-intensive and time-consuming, not to mention expensive—costing between \$24–41 USD<sup>1</sup>, depending on the complexity of the order. Differences in the way orders are received—whether via mail, faxes, or email; as paper, Adobe® PDFs, Microsoft® Excel® or Microsoft® Word® documents; or other electronic files— adds to the confusion and creates opportunities for errors.

Since sales order entry is a critical part of the sales transaction, it makes sense to automate the process and eliminate many of the errors associated with manual sales order entry. DocStar ECM Sales Order Automation (SOA) takes the extra work and worry out of sales order entry.

## Capture

DocStar ECM SOA uses Intelligent Data Capture (IDC) to automatically capture and extract sales order data such as customer, order date, and line items ordered. DocStar ECM SOA accepts and indexes sales orders, then moves the data on to the next step.

## Validate

DocStar ECM SOA integrates with Microsoft® Dynamics GP for data lookup; confirms customer information, purchase orders, quotes, and validation such as credit check and part number verification; and detects missing, incomplete, or incorrect data. DocStar lets you identify exceptions and automatically route them to the person tasked with the resolving the issue.

## Process

If all the conditions are met and there are no exceptions, the order is sent straight to Auto Allocation and fulfillment. For those orders with no exceptions, this is an easy way to accept, review, and initiate the orders—as quickly and efficiently as possible, but also with added human intervention as needed to facilitate and eventually finalize the sales cycle.

# DocStar ECM Sales Order Automation

Scan Purchase Orders  
Scanner/Multi-Function Copier



Intelligent Data  
Capture (IDC)

Recognize &  
Index Sales  
Order



Capture Purchase  
Orders Electronically

ERP

Validate Sales  
Order (valid  
customer, part  
number, etc)

Valid

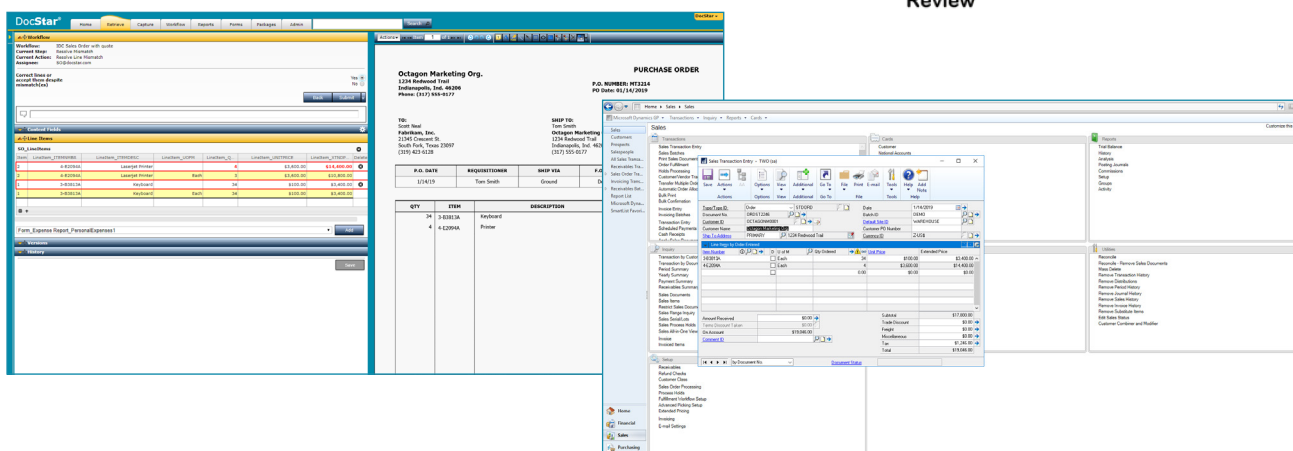
Exception or  
Review required



Correct  
Exception or  
Review



Create Sales  
Order in ERP



Ensuring that the sales order information data is accurately entered into your system has traditionally been time-consuming, labor-intensive, and prone to error. Automating this process with DocStar ECM Sales Order Automation ensures accurate data is automatically entered into your system's process—improving

transaction efficiency and reducing fulfillment time. In other words, it can save you time and money. DocStar accepts, reviews, and initiates customer orders more quickly—verifying POs, quotes, and parts availability to speed up the fulfillment process and improve customer service.

1 According to a study by American Productivity and Quality Center, the average company spends \$24.21 to \$40.87 to process a sales order. <https://www.apqc.org/knowledge-base/documents/cutting-costs-sales-order-processing>

## About DocStar

DocStar is a browser-based enterprise content management and process automation platform that enables global digital transformation. Easy to implement and use—both in the cloud and on premises—DocStar offers proven technology and global process expertise to empower organizations to work smarter, reduce costs and invest in growth.



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