

Solution Summary

Sales Order Processing

Speed order processing and improve customer service

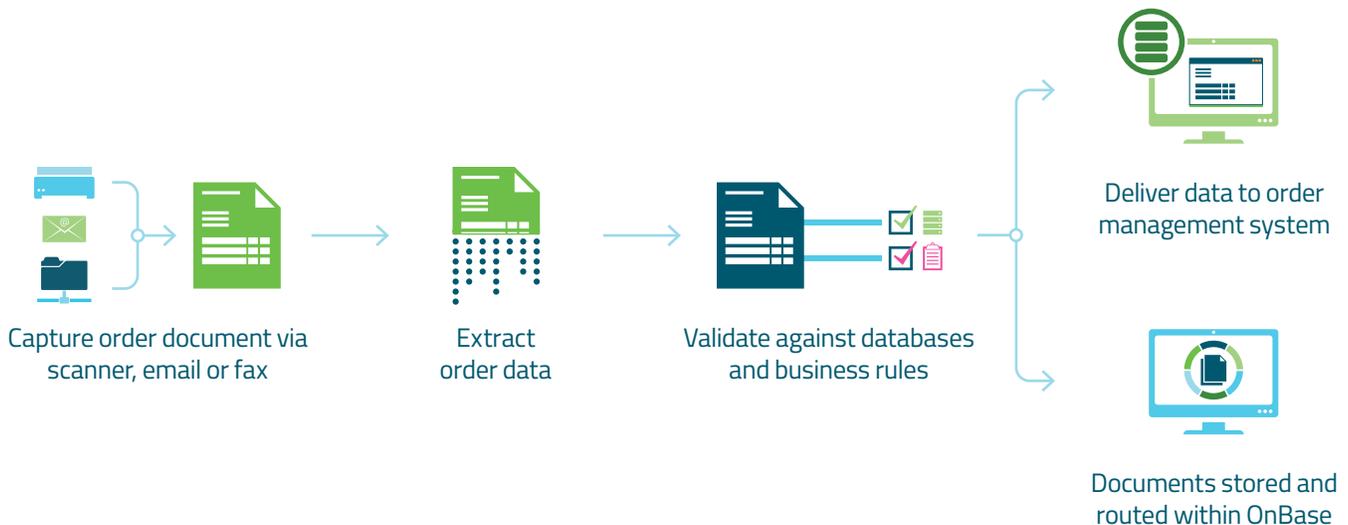
Creates efficiency through automated data entry and approval routing

Improves customer service with easy access to documents and accurate data downstream

Reduces days sales outstanding

When customer satisfaction is your number one priority, you depend on efficient and accurate sales processes. But when your order processing is manual and paper-based, you risk inaccurate data entry and a slow sales cycle.

OnBase speeds sales order processing by immediately capturing all incoming order documents and extracting order information. Documents and data are stored, posted to the ERP and routed to appropriate staff. With OnBase, you gain efficiency in order processing, improving customer service and ultimately speeding payment receipt.



One platform **Unlimited potential**

OnBase
by Hyland

Improving sales order processing positively impacts the entire order-to-cash cycle and customer relationship.

Gain efficiency through automated data entry and approval routing

In today's business world, your sales orders come in a variety of formats – whether in the mail, through fax, via email or as electronic orders. Dealing with those sales orders can be difficult, especially when your staff need to immediately access and process them. OnBase captures orders in any format, and makes them immediately accessible and searchable – even faxes directly from the fax server, so there's no need to print them.

OnBase automatically captures the critical information in the order documents, allowing organizations to reallocate staff devoted to manual data entry and reduce costs. Using OCR technology, with limited manual intervention, OnBase finds and captures information directly from sales orders. Then, the lifted information is validated using configurable rules and direct integrations with ERPs. For instance, OnBase intelligently recognizes the manufacturer's number on the purchase order and validates that number and price against the customer's contract list.

If there are remaining exceptions or errors, documents and lifted information are immediately presented to staff for review and correction. OnBase allows users to easily route documents and associated information to staff and management for approval and exception handling. OnBase can also automatically notify customers or sales teams when orders are rejected or approved to further simplify issue resolution.

Improve customer service with easy access to documents and accurate data downstream

OnBase not only acts as a capture and processing engine, it also stores documents, offering staff quick access later in the sales cycle and customer relationship. Staff and management can access order documents directly from their desktop or mobile device.

With specialized integrations, OnBase also facilitates access to documents from other systems, meaning users retrieve the information they need from whatever system they're most familiar with. By storing documents electronically, OnBase eliminates the need for staff to search through file cabinets. All of this amounts to quicker information access, empowering better customer service.

Reduce days sales outstanding

Improving sales order processing impacts the entire cycle and customer relationship. Speeding sales order processing shortens the overall order-to-cash cycle. As the order is processed quicker, the product or service can be delivered that much faster and payment is then received sooner, reducing days sales outstanding.

With revenue received and recognized faster as well as improved customer service, OnBase serves as your business's competitive advantage, increasing efficiency and lowering costs.

Learn more at OnBase.com »