



# ORDER PROCESSING BUYER'S GUIDE

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16 Questions for Maximizing  
Your Order Processing  
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 needed to select the most cost-effective and well-suited solution for your organization's order management requirements.

Esker has developed 16 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?

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 customer claims 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:



High cost per invoice



Limited control and processing



Complex IT environment



High error rates and incorrect shipments



Customer dissatisfaction



Decreased order processing speed

Manually processing sales orders is inherently labor-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 prepare, 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 processing automation can:

- Process orders 80% faster
- Cut processing costs by 50%
- Realize ROI in 3-6 months
- Increase staff productivity as much as 65%
- Process 100% of orders regardless of how they arrive
- Achieve data entry accuracy rates of over 99%

# 16 QUESTIONS FOR MAXIMIZING YOUR ORDER PROCESSING AUTOMATION INVESTMENT

## 01 END-TO-END ELECTRONIC PROCESSING

***“We would like to eliminate as much manual processing and 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 minimized. 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 no 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 labor costs. Esker processes and tracks any order or customer claim with complete accuracy, visibility and efficiency.



RECEIVE



EXTRACT



VERIFY



MANAGE

ERP

ARCHIVE



ANALYTICS &  
AUDIT TRAIL



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## 02 DASHBOARD & METRICS

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

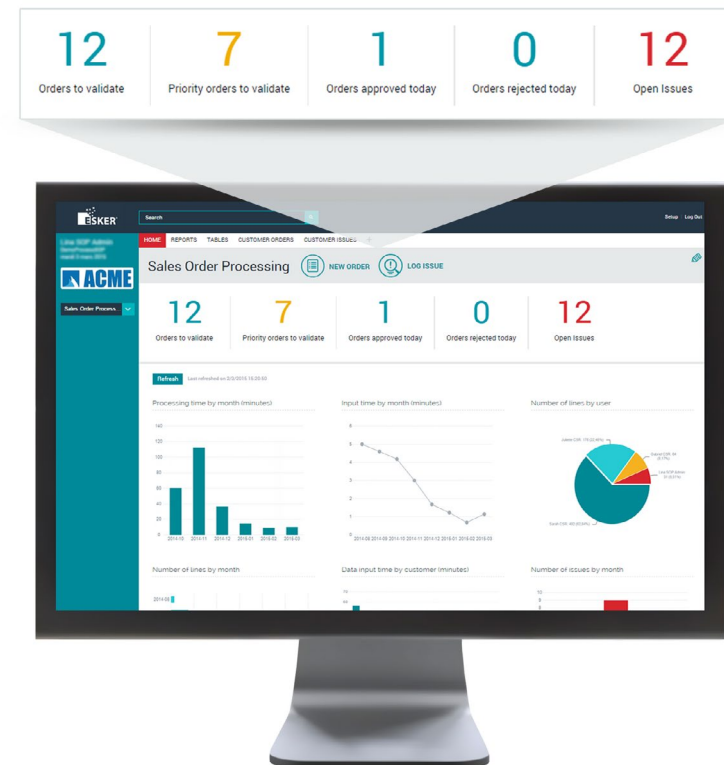
Your provider’s solution should offer packaged key performance indicators (KPIs) and dashboards that provide real-time visibility and other analytical tools. This type of enhanced control and monitoring makes it easier for everyone involved to perform daily tasks, monitor performances, analyze areas 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 customizable 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, gain insight on team capacity, review sales activity and trends, and much more.



## 03 CUSTOMER SATISFACTION

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***“Our customer claims are hard to track and manage, resulting in frustrated customers and CSR teams. Do you have an effective way to improve our claims processing and customer satisfaction rates?”***

The reputation of a company and the brand itself can be negatively affected by claims that are poorly managed. By automating issue management workflows, companies are able to respond to customer issues in a timely manner and eliminate inefficiencies and added costs associated with processing customer claims manually.



### Why Esker?

Esker logs and tracks all customer issues related to orders in the same interface as your orders, improving efficiency by truly automating issue management workflows.

CSR teams can create, manage and track customer issues while maintaining full visibility over the whole order process — from the moment an order is created, to the moment your customer is fully satisfied with the product received. With immediate access to documents, CSRs are able to quickly answer order status inquiries and maintain good customer relationships.

## 04 CUSTOMER PORTAL

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

Your provider's order processing solution should include an online customer portal, which simplifies exchanges and removes the hassle of keeping your customers up-to-date on their order status. Additionally, customers can place and track their orders directly online, accelerating the order processing time.



### Why Esker?

Esker's customer portal provides an open line of communication and a range of self-service options. Your customers can chat directly with CSRs to clarify or ask questions, facilitating collaboration and improving communication.

Customers can easily and securely send and track their orders with complete autonomy. With real-time access to product and order information, customers get essential data quicker and at their own convenience regardless of how they have submitted their order (e.g., fax, email, EDI, etc.).

## 05 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 and manage EDI-related errors?”***

Your solution provider should be capable of efficiently processing all received orders, including fax, email, paper and EDI. By processing all orders through one channel, CSRs, customers and business partners have the flexibility needed to meet their specific requirements.

EDI orders are rarely error-free. 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 errors.



### 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.

All EDI orders are automatically processed, even if they have errors. Esker takes information captured from an EDI order and creates a human-readable version that CSRs can then complete or correct and start the workflow as usual. Orders can be processed in complete autonomy without assistance from the IT staff. When EDI orders are error-free, Esker applies “touchless” processing, delivering improved efficiency and reduced costs.

Esker's Order Processing solution can easily be configured to work with your existing IT installations at your own pace – no need to make any changes to your EDI or ERP infrastructure.



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## 06 ELECTRONIC ARCHIVING

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***“We want to electronically 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 authorized 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 are always accessible to any authorized 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.

## 07 ACCURATE & INTELLIGENT DATA CAPTURE

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

Your solution provider should deliver intelligent data analysis tools to speed up the automation process and provide better accuracy and security for order processing.

To ensure accurate processing and minimize 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.).



### Why Esker?

Esker easily handles different order formats from one or multiple customers without the need for a specific template.

OCR and free-form technology are embedded in the solution, allowing it to easily deal with diverse content. Data validation and multi-pass verification ensure that the extraction is accurate. Character sequences are deciphered via context-based recognition, key words, fuzzy search, number computation and automatic data validation (where extracted data is cross-checked against databases). The technology automatically learns how to recognize desired information as corrections are made to the default recognition.



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## 08 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 processing 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 applications, is configured to address the unique needs of any business, and easily integrates with your current infrastructure.



#### Why Esker?

Esker offers independent workflow functions which provide flexible integration options should you need to connect with several applications used by different subsidiaries or departments within the company.

Esker is compatible with a wide range of ERP systems (e.g., SAP, Microsoft Dynamics, Oracle E-Business Suite, JD Edwards EnterpriseOne, etc.), desktop applications, legacy products and other business platforms.



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## 09 INFORMATION SECURITY & INTEGRITY

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

Hosting and processing other companies' business and financial documents brings up the question of internal controls and security issues.

SSAE 16 and ISAE 3402 audits are international reporting standards that analyze a service organization's control over information technology and related processes. A successful audit completion indicates that processes, procedures and controls have been formally reviewed.

In addition, the U.S. Department of Commerce and the European Commission have agreed on a set of data protection principles and FAQs (the Safe Harbor Principles) to enable U.S. and European companies to satisfy the EU law requirement that personal information transferred from the EU to the U.S. be adequately protected.



### Why Esker?

Esker's successful completion of an audit conducted by A-lign® for its on-demand automation solutions means that Esker's processes, procedures and controls have been formally reviewed and are documented in accordance with the SSAE 16 and ISAE 3402 Type II guidelines. SSAE 16 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 also adheres to the principles set forth by the Safe Harbor Privacy Policy in respect to transfers of personal information from the European Economic Area to the U.S. Consistent with its pledge to protect personal privacy, Esker has been certified by TRUSTe, an independent third party online privacy solutions provider.



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# 10 BUSINESS CONTINUITY

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

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 also make crucial business functions available to customers and suppliers at all times.



## Why Esker?

Each Esker server platform uses high-availability cluster technology that offers internal redundancies to counter any possible hardware failure. The platforms in North America and Europe back up one another, to maintain timely document transmission at all times.

Esker production centers feature solid architecture for document security. For example: data transfer by secure protocol (SSL) identical to those used for banking transactions, secure server bays, controlled temperatures for humidity and pressure, electric infrastructure with backup generators, fire prevention measures, and 24/7 monitoring offering continuous availability of worldwide services.

## 1 1

## ONE PLATFORM VS. STAND-ALONE SOLUTIONS

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***“Should we pull together different technologies from multiple solution providers or go with an integrated solution from one vendor?”***

In order to maximize simplicity and overall costs, the best-case scenario is to find a solution provider who can deliver all of the necessary technology to automate order delivery in a single solution. A truly integrated automation solution improves business processes and efficiencies, and delivers high ROI.



### Why Esker?

Esker provides all the necessary functions and technologies for fully electronic order processing all via one universal and source-independent automation platform. No need to rely on multiple products from various technology vendors — Esker has it all.

# 12 EXPANDING TO OTHER BUSINESS PROCESSES

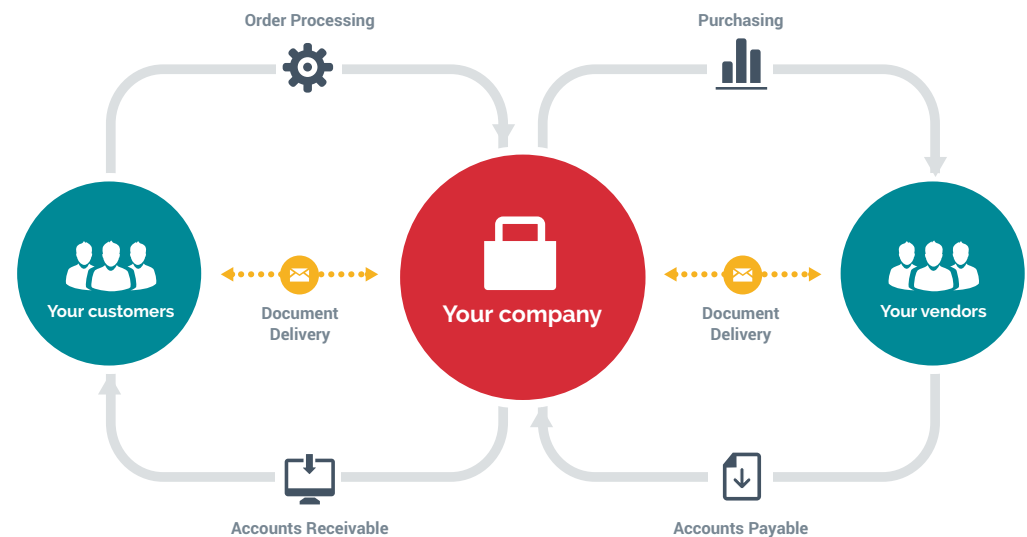
***“Today we’re in the market for an order processing solution, but tomorrow we may need to automate other business processes – can you support our growing business needs?”***

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 cash conversion cycle – not just order processing – to automate other business processes (e.g., accounts payable, accounts receivable, purchasing, etc.).



## Why Esker?

Esker allows you to control all of your document process improvement efforts in one shared and collaborative platform that spans the entire cash conversion cycle. Whether you want to automate and capture any inbound documents (e.g., sales orders, vendor invoices) or electronically deliver any outbound document (e.g., customer invoices, purchase orders), Esker allows you to automate as needed using a shared group of technologies.



# 13

## CAPITAL EXPENDITURE

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***“We cannot afford to invest significant IT resources or budget into a solution. What are our options to easily and affordably automate our order management process?”***

Software as a service (SaaS) is a delivery model in which software is centrally hosted in the cloud (i.e., on-demand) and accessed via an Internet web browser. SaaS delivers a more economical solution for many customers and has become a common delivery model for most business applications.

With no software or hardware to install, on-demand solutions allow companies to get up and running and experiencing a positive impact on their business quickly. Rather than mobilizing IT resources and investing in a large on-premises IT project, SaaS delivers a scalable, secure and affordable solution to streamline the order management process.



### Why Esker?

Esker offers customers the choice of implementing their automation solution on-demand or on-premises. This means you do not have to wait for IT resources to be available or budget to be allocated in order to get your project moving.

Companies can get the expected capabilities from an on-premises software solution or immediately benefit from an on-demand service that requires little to no upfront investment, and features a pay-per-use pricing model.



# 14

## SAAS VS. OUTSOURCING VS. ON-PREMISES

### ***“Why should we go with a SaaS model over an outsourcing service or hosting the solution on-premises?”***

Issues associated with Business Process Outsourcing (BPO) include: failing to meet service levels, unclear contractual issues, changing requirements and unforeseen charges, as well as a dependence on the BPO which reduces flexibility. Additionally, a major drawback with BPO is security risks both from a communication and privacy perspective.

Understanding the benefits of automating software with a SaaS model over BPO is key for prospective businesses. With a SaaS model, you maintain data ownership and visibility, gain flexibility to adapt to changing business conditions, benefit from security and confidentiality assurance, and enjoy a faster ROI.

While hosting a solution on-premises offers many of the same functional capabilities, it requires ongoing maintenance and investments in software and hardware.



#### Why Esker?

Requiring little to no upfront investment, Esker offers a pay-per-use SaaS platform that allows you to implement order processing automation rapidly and cost-effectively without the need to build or expand an in-house network while moving from capital to operational expenditure.

This approach helps preserve capital by automating without additional IT complexity or expenditures. Plus, the web-based nature of SaaS lets you expand approval workflow beyond the walls of the company (e.g., to subsidiary offices, manufacturing facilities, etc.) without having to open the corporate firewall. More than 5,000 SaaS customers and 200,000+ SaaS users worldwide rely on Esker every day to automate key business processes.

# 15 EXPERT CONSULTANCY & PROJECT METHODOLOGY

## ***“Will our solution will be implemented on time and within budget?”***

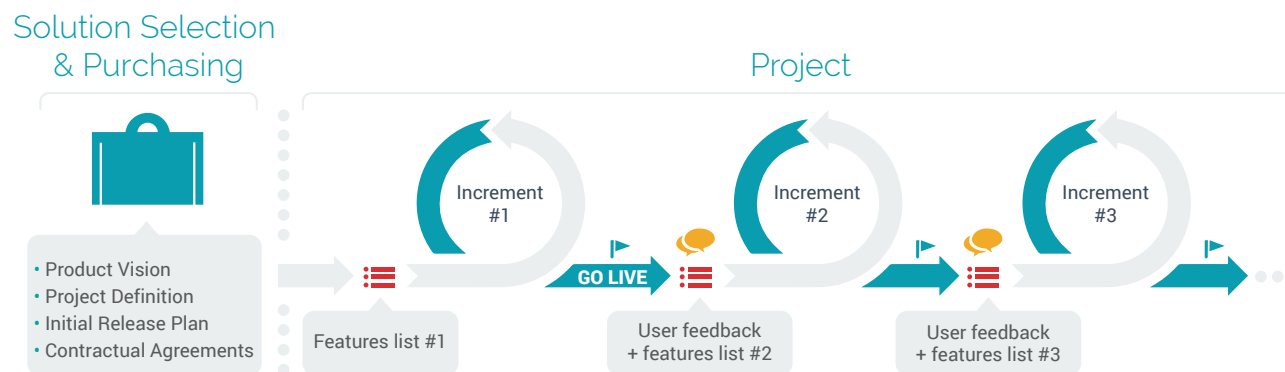
To get the greatest amount of business value in the shortest amount of time, you should be afforded a high level of involvement early in the planning and throughout the project. A skilled solution provider with years of solution implementation experience understands the importance of respecting timelines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



### Why Esker?

Esker's use of Agile methodology creates an adaptive environment of self-service and enhanced process insight so that customers, business partners and their key stakeholders are actively involved throughout and achieve maximum value in every phase of solution delivery in the shortest amount of time.

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 early and often throughout the solution delivery process.



# 16

## GLOBAL PRESENCE

***“Can you support our multiple offices and 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 (full DBCS support included) 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.

The Esker web user interface is available in numerous languages and local language support is available in many countries. 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 ORDER PROCESSING 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/business system — minimizing the number of manual touch points and allowing you to quickly process and track any order, regardless of format, with complete accuracy, visibility and efficiency.

### 6 ways Esker improves order processing

1. Ensures you never miss an order again
2. Eliminates 99% of order processing errors
3. Processes all order types: fax, email, paper or EDI
4. Makes every order and customer claim visible in real time
5. Helps customers meet SLAs
6. Provides a clear view of your order backlog



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## HOW THE SOLUTION WORKS



## REAL RESULTS ACHIEVED BY ESKER CUSTOMERS

- Reduced order processing time from 10 minutes to 60 seconds
- Savings of 9,100 hours and \$170,000 in the first year of automating orders from just 2 customers
- Achieved an ROI of 128% in just 10.7 months
- Saved \$100,000 in infrastructure costs
- Facilitated a 40% annual growth rate without hiring additional staff to process orders
- Reallocated 9 CSRs to Inside Sales positions, helping to generate additional revenue



Our people now have the ability to provide quicker answers. One of our mottos is 'one call, one answer' and Esker's solution contributes to that.

Director of Customer Advocacy, Pentair, Inc.



Esker has enabled our customer service department to work smarter, better and faster. We're able to be more responsive to our customers.

Director of Global Customer Support, MEDRAD, Inc.



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



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## ABOUT ESKER

Esker is a worldwide leader in cloud-based document process automation software. Organizations of all sizes use its shared platform of solutions to automate accounts payable, order processing, accounts receivable, purchasing and more. Esker's solutions are compatible with all geographic, regulatory and technology environments, helping over 11,000 companies around the world in their efforts to Quit Paper™.



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.



## LEARN MORE

For more information on Esker and its solution, visit [www.esker.com](http://www.esker.com).

Follow Esker on Twitter at [twitter.com/eskerinc](https://twitter.com/eskerinc) and join the conversation on the Esker blog at [blog.esker.com](http://blog.esker.com).



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