

OpenText Solution Brief
OpenText ECM Suite for SAP
ECM for Sales Order
Management by OpenText

Objectives

Solution

Benefits

Quick Facts



Optimize Sales Order Management with Enterprise Content Management

Higher Efficiency and Speed in Sales Order Management for Competitive Advantage

A fast and reliable order management process results in customer satisfaction and helps to increase wallet share.

Optimizing sales order management is driven by a two-fold strategy: increase the percentage of orders received via new channels and at the same time automate the processing of orders received via traditional channels on paper and fax.

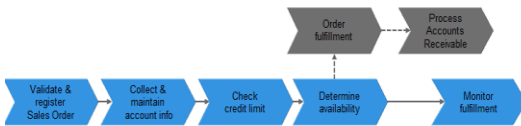
Even though new channels become of increasing importance, for many enterprise getting orders via traditional channel on paper and per fax is still a reality. The manual process of registering these orders is slow, unreliable and error-prone.

Not only speed and quality is important, but also to have complete transparency and process control, to be able to prioritize orders and to swiftly answer customer inquiries regarding order status. This applies to all sales orders regardless of the channel they came in.

Last but not least proactive notification regarding the order status as well as personalized correspondence will help to drive customer satisfaction and can even be leveraged for cross and up sell.

ECM for SAP helps customer to automate and speed up sales order processing, increase process transparency and customer satisfaction.

Higher Efficiency and Speed in Sales Order Management



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Automated Order Entry

ECM for Sales Order Management provides automated order entry with OCR for the traditional channels and complete transparency for all stakeholders in the process.

ECM for Sales Order Management processes sales orders received on paper, as fax or as email.

component can be configured to “learn“ the mapping from customer article numbers to the SAP material numbers.

Paper orders are scanned in, paper and fax orders are processed by an OCR engine (Optical Character Recognition), which automatically extracts order header and line item information like article numbers and description. The extracted data are validated against SAP master data and passed on to SAP, where a workflow is started.

The SAP workflow uses the OCR data to automatically populate the sales order creation transaction thus eliminating manual work and reducing sources for errors. Any further process steps can be configured to be part of the processing workflow, for example to validate the customer, check the credit limit and the availability of the articles ordered.

If a customer is not ordering based on a catalogue but rather uses his own article numbers for ordering, the validation

As soon as a sales order enters the system, it is registered in an sales order ledger, which provides an overview over all orders being processed, their status and agent working on it.

Automated Order Entry

Full Transparency with
Customer Folder

Targeted Customer
Communication



Full Transparency with Customer Folder

ECM for Sales Order Management provides a 360 degree view of all customer related information including the complete order history and order status.

ECM for Sales Order Management provides a customer folder with a 360 degree view on the customer.

All information related to customers including the complete order history can be accessed in role specific business process views, structured data from SAP ERP or SAP CRM as well as all documents and correspondence that have resulted from processes in marketing, sales, order processing, customer service or revenue accounting.

As a result, all customer facing roles are fully informed about the status and current activities regarding a customer, can swiftly respond to customer inquiries and make informed decisions regarding the account.

The customer folder is fully integrated in SAP ERP and/or SAP CRM and the respective SAP user interfaces with an intuitive user interface. Alternative access is provided outside SAP in the preferred environment of the user, be it MS Outlook, Windows Explorer, or the rich Web user interface of OpenText Business Workspaces.

Automated Order Entry

Full Transparency with Customer Folder

Targeted Customer Communication



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Targeted Customer Communication

Automated Order Entry

Full Transparency with
Customer Folder

Targeted Customer Communication



ECM for Sales Order Management enriches customer experience with multi-channel communication and targeted individualized messaging.

Customer communication is a powerful interface to the customer and can be a key differentiator. In the order-to-cash process it is essential to proactively inform the customer regarding any changes of the delivery date or delivery itself. With the multi-channel delivery, the preferences of the customer will determine, if he gets an email, an SMS or a paper document.

ECM for Sales Order Management provides a platform for consistent messaging and transforms ordinary customer communications into powerful, one-to-one marketing channels. Order confirmations can be used to advertise

additional individual offerings, and thus be leveraged for cross an upsell.

ECM for Sales Order Management consolidates, produces and delivers customized documents when and where you want them, ad-hoc letters or emails to the customer as well as mass documents like order confirmation.

Line-of-business users can design and deliver one-to-one messages by including targeted content on any type of enterprise document. The result is higher brand recognition and customer loyalty. At the same time it reduces IT costs by increasing communication efficiencies.



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Creating Shareholder Value with ECM for SAP

ECM for Sales Order Management automates sales order processes, reduces cost and helps to grow revenues.

ECM for SAP helps customer to automate sales order entry through traditional channels with automated order recognition bases on OCR technology. This eliminates manual work for the registration, reduces sources for errors, improves the quality and speeds up the entire process.

Customer Folder provides a 360 degree view of the complete customer information including order history and order status. With views adapted to the different customer facing roles, it provides easy and intuitive access. This results in faster response time to inquiries and informed customer interaction.

Secure retention and Records Management grants compliance with legal regulations and reduces operational and legal risks.

Customer Communication enables business stakeholders to design and deliver one-to-one messages by including targeted content on any type of enterprise document. It automates the document creation and multichannel distribution process and saves costs.

As a result the cost per sales order is reduced and the sales order process is fast and reliable. Together with targeted pro-active communication this increases customer satisfaction and leverages cross and upsell potential to increase wallet share per customer.

Creating Shareholder Value with ECM for SAP



Best run organizations have over 4 times less cost per sales order



\$6.8 Top Performer

\$16.0 Median

\$32.0 Low Performer

Average cost per sales order for orders received through "traditional" channels (USD)

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Summary

ECM for Sales Order Management automate sales order processes. It provides 360 degree view on customer information, including order history and order status, and comprehensive control of customer interaction with targeted multi-channel customer communication.

Objectives

- Fast, efficient and reliable order entry process with full process transparency
- Easy access to complete customer information, order history and status.
- Compliance with legal regulations regarding document retention
- Superior customer experience to increase customer satisfaction and in turn customer retention and wallet share.

Key Capabilities

- Automated order entry with OCR, SAP workflow and sales order ledger
 - 360 degree view on customer data and documents including complete order history
 - Targeted multi-channel customer communication based on branded templates
 - Tight integration in SAP ERP and CRM
 - Secure long term retention of customer records
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Benefits

- Higher efficiency & speed for sales order processing to reduce costs of sales (SG&A) and increase revenues.
 - Faster resolution time for customer inquiries, increased customer satisfaction and wallet share.
 - Higher messaging quality, brand recognition and customer loyalty.
 - Compliance and reduced legal and operational risks.
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www.opentext.com/sap

