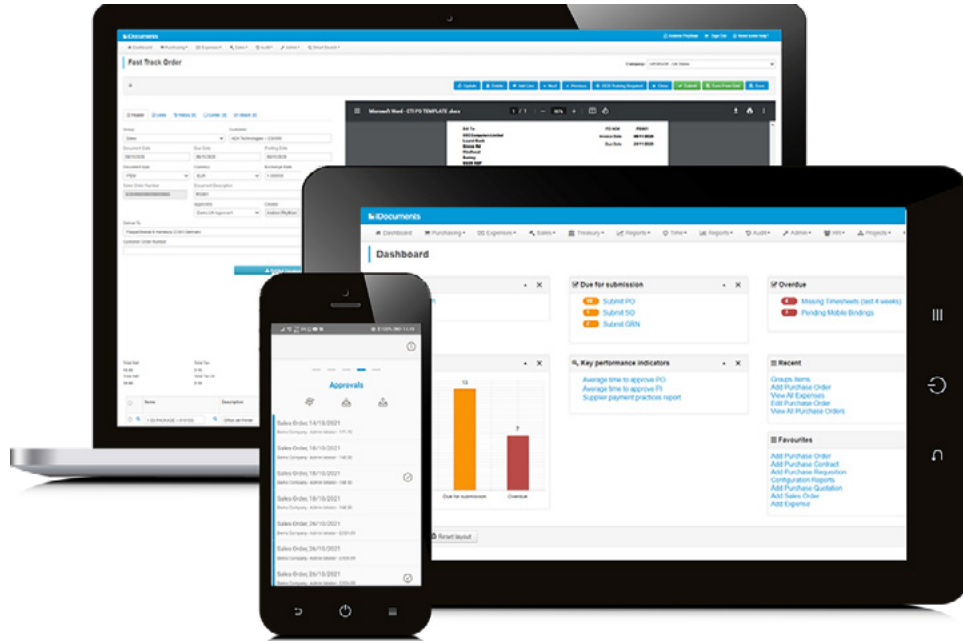# iDocuments
Sales Order Automation

Vision33

Decrease order processing time, increase profitability, and strengthen customer relations.

Inbound sales orders are the lifeblood of every company, but correctly processing them takes time and attention to detail.

iDocuments Sales Order Automation (SOA) empowers companies to automate the receipt and processing of inbound sales orders via email, freeing up sales teams for more valuable initiatives. SOA uses artificial intelligence (AI) and machine learning (ML) to automatically capture, validate, and process incoming order data at the header and line levels, eliminating the need to manually enter countless sales orders and their associated line items.

With iDocuments Sales Order Automation, you'll:

Reduce order processing time
Automatically receive, capture, and convert emailed purchase orders to sales orders, freeing up staff to sell more.

Increase profitability
Decrease order processing costs and consistently enforce order management practices such as limiting discounts to protect margins.

Strengthen customer relations
Give customer satisfaction a boost! Powerful OCR technology improves order accuracy and processes orders faster than manual, error-prone data entry.

Accelerate time to value
Eliminate costly EDI setups and benefit from a proven implementation methodology that ensures rapid ROI.
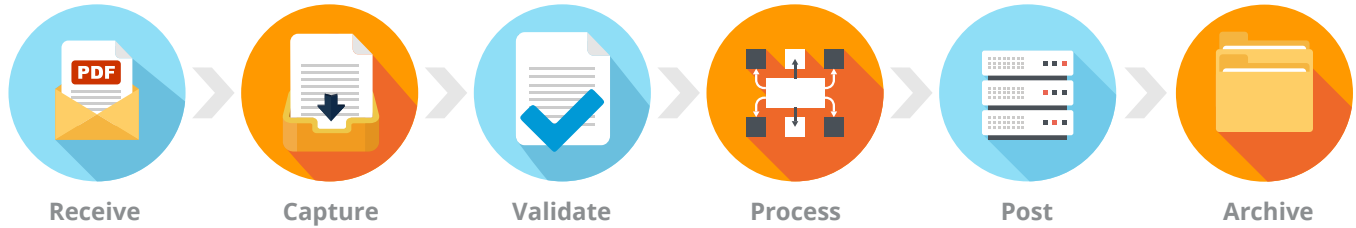
Get instant insights
Track and analyze order status with both out-of-the-box and custom-built reports and personalized dashboards.

Maximize existing technology investments
Integrate with core business systems, synchronize the data that flows between them, and eliminate costly, non-essential software licenses.

How It Works

Receive → Capture → Validate → Process → Post → Archive

Receive Receive inbound purchase orders by email as PDF attachments and automatically acknowledge receipt.

Capture Automatically capture order data, including line-level detail, using AI and machine learning.

Validate Match customer account, product, and pricing details with data stored in your ERP and in accordance with business rules and policies.

Process Manage exceptions and route orders to the correct person if approval or manual intervention is required.

Post Automatically create and post a sales order to your ERP, CRM, or other internal systems.

Archive Archive orders once they've been processed.

Key Functionality

iDocuments Sales Order Automation is powered by The Saltbox Platform, delivering robust functionality and agility.

✓ **Intuitive web interface and mobile app** Review and approve draft sales orders anywhere, anytime.

✓ **Integrate with any ERP, accounting, or financial management software** Ensure consistent and accurate data and financial reports.

✓ **Smart Search** Quickly locate sales order documents with Google-style search.

✓ **Flexible configuration** Configure the solution that best supports your policies, processes, and systems.

✓ **Powerful, configurable workflow engine** Apply your own business rules and logic to workflows to ensure compliance.

✓ **Support for multiple entities, languages, and currencies** Conduct business globally.

✓ **Personalized dashboards and out-of-the-box analysis reports** Analyze business performance with 24/7 access to your personalized dashboard and reports.

✓ **OCR data capture engine** Leverage artificial intelligence and machine learning to improve processing speed and eliminate manual data processing errors.

A Trusted Partner

Vision33 solves customer business challenges through the promise of technology and the value it delivers. We partner with organizations in the public and private sectors to understand their vision and help them attain it with the right blend of strategy, consulting, and technology. Vision33 is consistently recognized by the industry for its notable growth and dedication to helping customers achieve success.

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