



Industry Snapshot: Sales Order Automation

Still Doing It Manually? Time to Automate Your Sales Order Process

A purpose-built, fully automated sales order solution that transforms incoming electronic documents into 100% data-accurate touchless outcomes can save money, reduce errors, and improve the customer experience—all while accelerating your digital transformation efforts.



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Introduction

U.S. sales processed through B2B ecommerce sites and online consumer marketplaces such as Amazon increased 10.9% to reach \$9 trillion, the highest ever, according to the 2020 U.S. B2B Ecommerce Market Report. Even more impressive, the report says, is that B2B ecommerce grew more than 18% in 2019 to \$1.3 trillion.

Despite this proliferation of electronic sales transactions, customers still tend to fax and email purchase orders that companies need to manually enter. With a high volume of customers, this antiquated approach to orders sets companies up for errors, delays, and wasted resources.

In fact, almost half (49.3%) of total B2B sales are still conducted manually, according to a 2018 B2BecNews survey of 276 manufacturers, wholesalers and distributors by personnel such as account managers and salespeople. Therefore, anything that manufacturers and wholesale distributors can do to simplify processes and reduce the time it takes to get products and services to the customer —without errors—can save money and earn repeat customers.

“Manufacturers increasingly believe that what sets them apart is not the product, rather it is their ability to deliver superior service in a highly competitive market,” says Mark Toffoli, Vice President of Sales and Business Development for Conexiom. “The one who can deliver the most efficient transactions and do it with zero errors is going to retain the most customers and have the most profitable business. Error-free service becomes a differentiator when products become very similar.”

“Purpose-built Sales Order Automation (SOA) solutions can eliminate the need for human intervention and provide touchless transactions for all orders with 100% accuracy.”



What Is Sales Order Automation?

Fortunately, there are solutions on the market that take the manual labor out of generating, processing, and analyzing sales orders. A purpose-built sales order automation solution that delivers 100% data accuracy and touchless orders will save costs and create efficiencies. But in the long run, you can understand the buying history of your customers to help direct marketing efforts and generate new business.

The sales order process seems simple enough. A customer service rep must key purchase order information into their ERP system so that it becomes a sales order for the seller. Once it becomes a sales order in the seller's system, it sets off the chain of events from order fulfillment to billing.

For businesses that do low volumes of sales, a human can take care of most tasks. As volume increases, however, the potential for mistakes increases and costs build up as more personnel are hired to handle sales orders.

With Conexiom, a buyer sends a purchase order via email, and the information is taken out of the email and populated into the ERP system automatically. This completely eliminates the need for manual entry and makes the process 100% touchless.

There are many benefits to purpose-built Sales Order Automation (SOA) solutions, including the following:



Touchless transactions eliminate the need for human intervention and provides 100% accuracy.



Less human interaction reduces potential for errors and increases transaction speed while maximizing efficiency and profitability.



Pure SOA solutions automate all transactions regardless of their format, complexity, or repeatability, and work with all sales order formats.



Through machine learning, customized business rules are automatically applied to repeat customers' purchase orders.



Mature solutions differentiate between structured and unstructured data in any digital document to find patterns and populate sales orders in seconds.



True Automation

Not all SOA solutions are created equal. While some SOA solutions feature partial automation such as optical character recognition (OCR) or robotic process automation (RPA), many don't offer True Automation. True Automation enables information to be extracted from a digital document with 100% accuracy and transformed into a touchless order in a company's enterprise resource system (ERP).

Some companies that claim to offer automation are really just workflow solutions, meaning they can take customer orders and put them into a customer's sales order platform. In reality, however, they only deliver about 60% to 70% automation, and validation with a customer service representative or a sales team is still required.

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Consider the following features of a truly automated SOA solution:



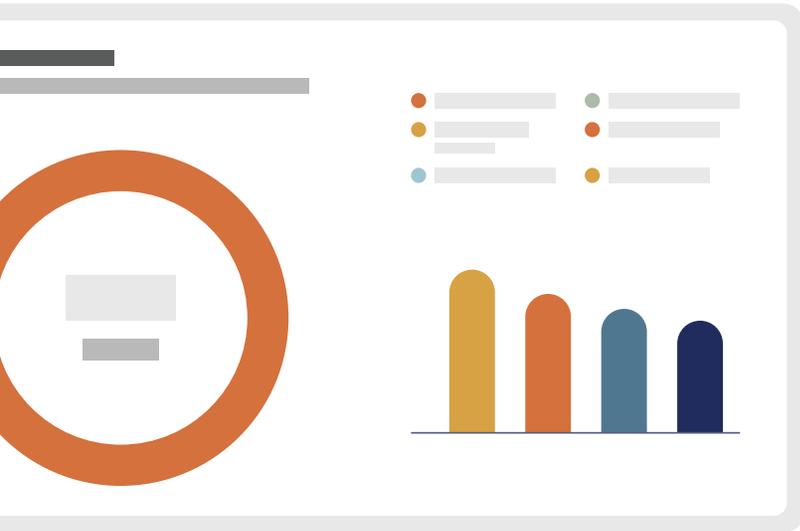
For organizations already employing EDI and other electronic means of producing sales documents, truly automated SOA can seamlessly integrate with existing systems, such as Salesforce, with little or no extra investment in hardware or software.



Comprehensive automation can take information from a hard copy or emailed sales order in more than 50,000 unique formats, and immediately populate information such as part number, customer number, and prices into a company's ERP system within minutes.



In some cases, orders can be fulfilled and on the way to a customer from a company's warehouse within 15 minutes.



“A fully automated SOA solution can eliminate costly human error in supply chains, while ensuring there is an electronic audit trail if there is a problem.”

Benefits of a Purpose-Built SOA Solution

Cloud-based sales order automation solutions can remove the need for manual entry of sales orders, freeing up salespeople and customer service personnel to deliver a first-class customer experience and sharpen their competitive edge. The average CSR spends up to 50% of their day manually typing in sales orders—that’s valuable time that could be freed up with SOA, to be better spent on higher-value activities that deliver a superior customer experience.

One of the biggest benefits is exceeding customer expectations of business outcomes. A fully automated SOA solution can eliminate costly human error in supply chains, while ensuring there is an electronic audit trail if there is a problem. With more than 1,400 unique algorithms to accommodate all the high degrees of variability in sales orders, Conexiom can make sure there are no errors in production from sales to procurement to AP invoice payment.

For recordkeeping, electronic archives save a copy of the purchase order to ensure both an electronic notification and an audit trail. Artificial intelligence (AI) helps power a data assessment engine that can organize, sort, and analyze thousands of emails to help you better automate your sales orders and give the best service to your customers. Sales order analytics can sift through thousands of emails, assess high and low volume customers, and help target marketing efforts to future sales.



The Right Tool for Digital Transformation

The pandemic has changed the way that companies do business, and contactless is now the preferred method of handling transactions. For organizations looking to step up their digital transformation, now is the time to upgrade.

“If you’re a manufacturer or distributor, there probably isn’t a better time to digitally transform, whatever that means to your specific organization,” says Judd Marcello, Chief Marketing Officer for Conexiom. “Modernizing your approach to processes, specifically manual processes, with automation is now the imperative.”

Where do you start? You start with processes that are costly, inefficient, and error prone. Upgrading or accelerating an SOA project could be the perfect way to get started on that digital transformation project your organization has been meaning to accomplish.

With the right SOA transformation partner—like Conexiom—time to value can be as little as 30 days. The best part: No one on the buyer or the seller side has to change their processes to benefit from our unique approach to SOA.

The results appear almost instantly; just look at the satisfied customers. Conexiom’s SOA tools helped Grainger, an industrial distributor, by ensuring that 95% of their orders are processed in under 2 minutes. The company also helped eliminate \$3.3 million in yearly manual entry costs at electrical distributor Werner Electric Company. Finally, at a leading global manufacturer of aerospace systems, Conexiom’s automation software reduced order processing time from 1 to 3 hours to less than 2 minutes.



Modernize Your Customer Experience with Sales Order Automation

Working with a vendor that provides a purpose-built SOA solution that delivers true automation can help your business enjoy lower costs, accurate orders, and happier clients.

While it's easy to take the word of companies that offer automation to the sales order process, only Conexiom delivers true automation: 100% accurate and 100% touchless, across 100% of your orders. True automation can help modernize and scale your business to better serve your customers.



Maximize Efficiencies and Results with True Automation

Eliminate the manual processing of business-critical commercial documents with 100% data accurate, touchless transactions to exceed business outcomes and deliver a superior customer experience.

“Our staff loves Conexiom. Spending less time behind the computer and more time in front of our customers is the smartest move we ever made.”

Mick Gianetti
Systems Operations Manager
Standard Electric

Learn More

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About Conexiom

Conexiom's cloud-based automation platform eliminates manual entry and approvals in the order-fulfillment process by transforming complex data into 100% accurate, touchless transactions, delivered seamlessly into the ERP. Manufacturers and distributors across the globe, such as Grainger, Genpak, Prysmian, Rexnord, USESI, and Compugen, trust Conexiom to improve efficiency, speed and accuracy, increase profitability, and elevate the customer experience, while eliminating unnecessary costs from manual approaches.

Conexiom is based in Vancouver, British Columbia, and has offices in Kitchener, Ontario; London, England; and Chicago, Illinois.