



A Closer Look

Intelligent Sales Order Automation for Sage X3.

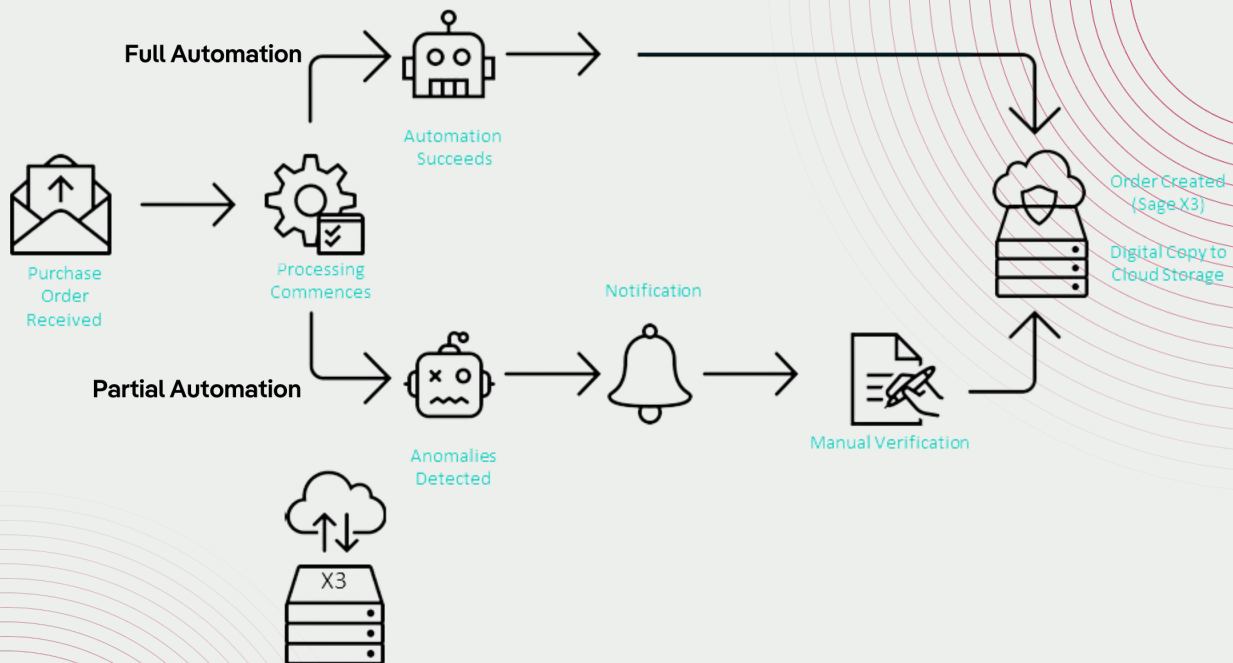
X3CloudDocs Sales Order Automation builds on the AP Automation tool (Inbound) making it possible to create Sales Orders from Purchase Order documents automatically. Purchase Orders can be received via e-mail or manually uploaded to X3CloudDocs. Data is extracted using OCR/TLX processing. Further validation is performed against master data uploaded from Sage X3. A Sales Order is then automatically created. A copy of the original document is stored in the cloud and can be viewed directly from Sage X3.

Functionality

X3CloudDocs Inbound SO streamlines the Sales Order Creation process by automatically processing and verifying customer purchase orders and creating the Sales order in X3. Key features include:

- Receive customer orders from a variety of sources (email, drag & drop, folder automation)
- Automatic notification of order receipts from customers
- Automatic or manual processing of customer orders, validated against Sage X3 data
- Text Layer Extraction (TLX) and Optical Character Recognition (OCR) automatically extract relevant order information for processing
- Multi-currency
- Duplicate PO checking
- Automatic Sales Order creation in Sage X3, with the customer's PO securely attached
- Uses existing Sales configuration in Sage X3 to validate inputs, with a dedicated control panel for monitoring and handling anomalies
- Works with your current Sales Order approval and notification workflows in Sage X

Sales Order Processing Workflow



Business Benefits

X3CloudDocs Sales Order Automation drives efficiencies in the sales department by automatically processing incoming customer orders removing the need for rekeying. Utilising a best-in-class enterprise-grade document and image processing engine coupled with AI and machine learning technology - customer orders are seamlessly converted into sales orders in Sage X3 without any manual intervention.

- Significant time and cost savings removing the need for any manual rekeying of customers' purchase orders.
- Automatic processing of incoming orders closes the gap between the time of ordering and stock allocation whilst also removing human rekeying errors.
- A best-in-class document and image processing engine means each customer can have their individual order document format and they don't have to change the way they interact with you meaning zero customer impact and a rapid ROI with no transition period.