

Sales Order Automation for Microsoft Dynamics GP

DocStar with Sales Order Automation offers accelerated time-to-value, reducing errors, lowering costs, and improving operational visibility.

DocStar Sales Order Automation software helps add value to your business, productivity to your process, and profit to your bottom line.

Faster. Smarter. Cheaper. Business today is more competitive than ever. Does your business have the tools to keep up?

Sales order entry is part of nearly all manufacturing operations, setting the tone if not the speed for the entire process. Too often, sales order entry is done manually, which is labor-intensive and time-consuming, not to mention expensive—costing between \$24–41 USD*, depending on the complexity of the order. Differences in the way orders are received—whether via mail, faxes, or email; as paper, Adobe® PDFs, Microsoft® Excel® or Microsoft® Word documents; or other electronic files — adds to the confusion and creates opportunities for errors.

Since sales order entry is a critical part of the sales transaction, it makes sense to automate the process and eliminate many of the errors associated with manual sales order entry. Epicor ECM Sales Order Automation (SOA), a module of DocStar®, takes the extra work and worry out of sales order entry.

Capture

DocStar SOA software uses Intelligent Data Capture (IDC) to automatically capture and extract sales order data such as customer, order date, and line items ordered. DocStar SOA software accepts and indexes sales orders, then moves the data on to the next step.

*According to a study by American Productivity and Quality Center, the average company spends \$24.21 to \$40.87 to process a sales order. <https://www.apqc.org/knowledge-base/documents/cutting-costs-sales-order-processing>

Microsoft® Dynamics GP®

DocStar Sales Order Automation Benefits

Help reduce overall costs

Improve transaction efficiency

Achieve measurable efficiencies

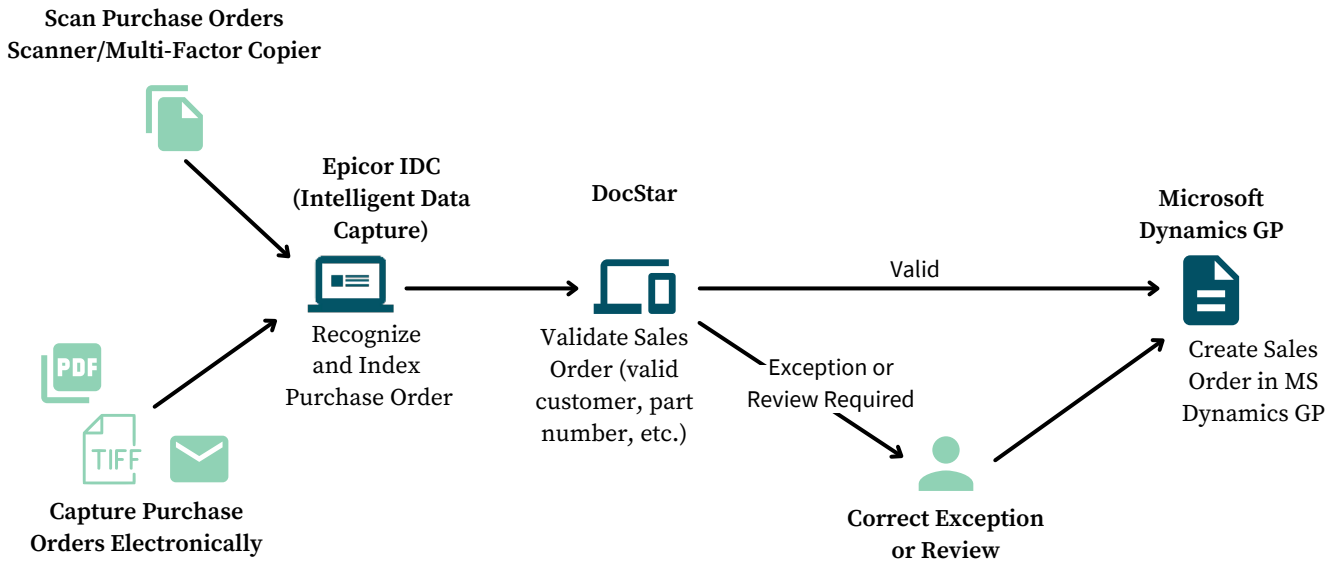
Enhance accountability

Accelerate business processes

Improve fulfillment speed

Eliminate transposition errors

Avoid losing or misplacing orders



Validate

DocStar SOA software integrates with Microsoft Dynamics GP for data lookup; confirms customer information, purchase orders, quotes, and validation such as credit check and part number verification; and detects missing, incomplete, or incorrect data. SOA lets you identify exceptions and automatically route them to the person tasked with resolving the issue.

Process

If all the conditions are met and there are no exceptions, the order is sent straight to Auto Allocation and fulfillment. For those orders with no exceptions, this is an easy way to accept, review, and initiate the orders—as quickly and efficiently as possible, but also with added human intervention as needed to facilitate and eventually finalize the sales cycle.

Helping ensure that the sales order information data is accurately entered into your system has traditionally been time-consuming, labor-intensive, and prone to error. Automating this process with SOA helps ensure accurate data is automatically entered into your system’s process—improving transaction efficiency and reducing fulfillment time. In other words, it can save you time and money. SOA accepts, reviews, and initiates customer orders more quickly—verifying POs, quotes, and parts availability to speed up the fulfillment process and help improve customer service.

Requirements

SOA for Microsoft Dynamics GP is an add-on module to DocStar that requires:

- DocStar version 19.0 or higher
- Epicor IDC for SOA
- Microsoft Dynamics GP version 2013 R2 or higher

EPICOR

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