PO Acknowledgement

Automate Your Vendor Purchase Order (PO) Acknowledgement Process

Maintain Visibility and Minimize Risk

A purchase order created in your ERP system brings order to what otherwise could be a logistical nightmare—it makes orders easier to track, it allows an audit trail, and it makes it easier and quicker for most vendors to fulfill your request. But when you receive a PO acknowledgement in return from your vendor, it may be in the form of a formal acknowledgement printed from their system or it could be an unstructured email—or worse—a hand-written note. You dutifully checkmark "Acknowledged" on each PO line in your ERP and you do your best to store each document for future reference because a PO acknowledgement—no matter what form it is in— is a legally binding agreement between your company and your vendor. Multiply this PO acknowledgement process by thousands of PO lines and the situation is extremely difficult to manage—emails are flying all over the place or a paper acknowledgement is buried on someone's desk, and you have found out too late that a vendor cannot fulfill your order on-time if at all.

Bring order to the chaos with the PO Acknowledgement solution add-on to DocStar, an Epicor solution, combined with Epicor Intelligent Data Capture (IDC). It starts with input into the DocStar document repository from fax, email, scanner, or file drop. IDC reads the PO Acknowledgement document and matches document elements to indexable fields, such as PO number, vendor ID, item ID, quantity, price, to name a few. For those hand-written acknowledgements, the user has the option of indexing those scans manually. DocStar then auto-matches these fields to the Prophet 21 PO header and detail lines, marks, and dates each PO record "Acknowledged," and stores the document in the DocStar repository so that it is easy to find later. Any exceptions in the matching process are sent to a human to resolve and then complete the acknowledge-ment process.

Intelligent Data Capture

Instantly recognize and extract key information from inbound vendor PO acknowledgements. Using industry-leading OCR technology, combined with highly sophisticated artificial intelligence, the DocStar PO Acknowledgement solution achieves the highest possible levels of automation accuracy.
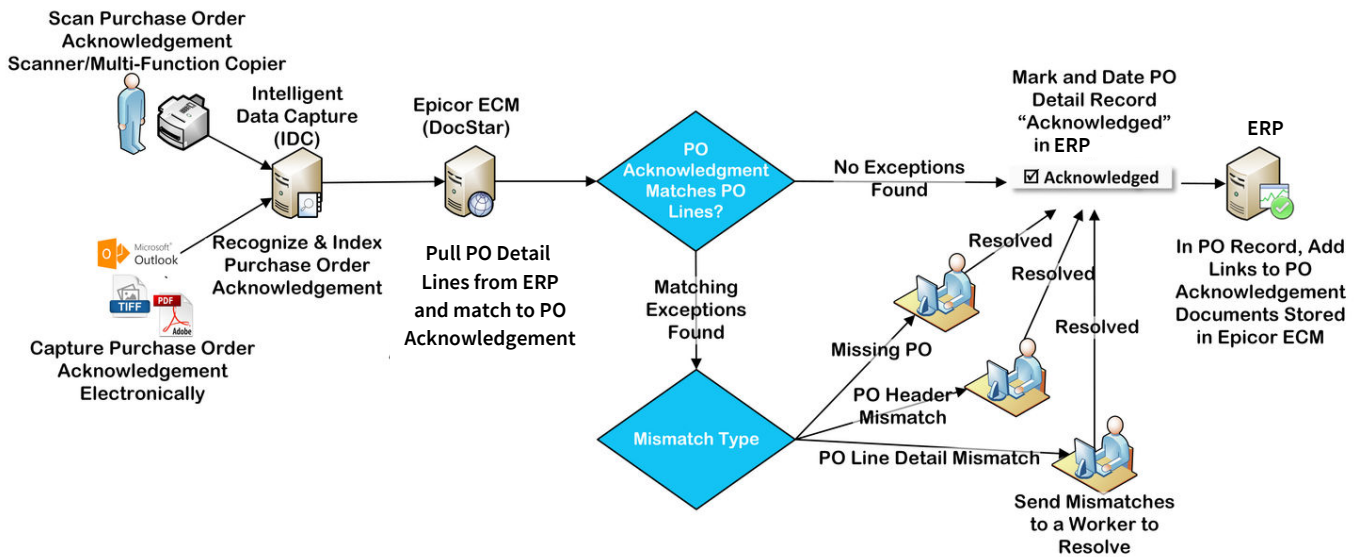
DocStar

Benefits

Gathers all associated PO Acknowledgement documents into a central, paperless, and secure repository accessible by workers, on-site or remote

Enables quicker visibility into your vendor's intent to fulfill an order, giving you the chance to find another vendor in the time needed

Identifies order discrepancies earlier in the process, before you reach the AP invoicing step

Contributes to increased digitization of the procure-to-pay automated process, especially when combined with these DocStar modules: AP Automation and Intelligent Data Capture (IDC)

Web browser-based user interface means no client software to maintain

Incoming PO acknowledgement documents are matched, stored, and check marked "Acknowledged" against the PO record

Epicor Intelligent Data Capture (IDC) allows you to:

- Automatically capture and process type-written PO acknowledgements
- Improve accuracy with automated data matching
- Speed PO acknowledgement match-to-PO processing time
- Eliminate the typical document capture setup process by using machine learning algorithms

Advanced Workflow

At its core the DocStar PO Acknowledgement solution benefits from one of the most powerful workflow engines available, balanced with an easy to use graphical workflow designer. Yet all this technology results in a highly intuitive solution for your team. We've done the hard work, so you don't have to.

- Automatically perform matching between your PO and vendor's PO acknowledgement
- Send exceptions—missing PO, header-level or line-level mismatches—to a human to resolve and complete the acknowledgement workflow
- If handwritten acknowledgements or other unstructured documents are received, scan and manually index them into the system
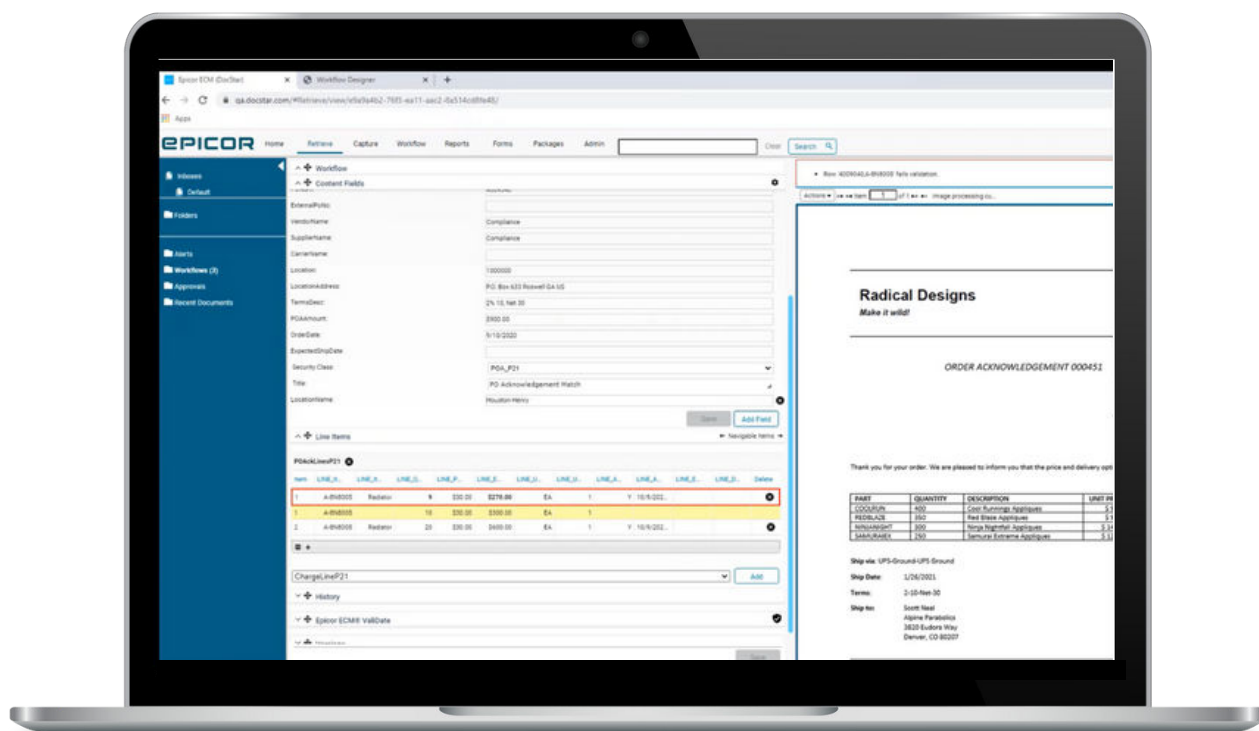
Help ensure Compliance

Let DocStar help ease the burden of regulatory compliance and retention requirements. Consistent and secure, DocStar combined with the PO Acknowledgement solution helps ensure that your organization is following the recommended procedures you've established for document attachments stored in the DocStar repository and linked to your PO records.

- View all associated PO documents—acknowledgements and printed POs
- Help ensure records retention compliance
- Monitor document access and activity with audit trails
- Guarantee file integrity with DocStar ValiDate authentication
- Keep your documents safe and secure in the event of a disaster with electronic document storage
- Gain greater business insight with full reporting tools

Key Features

- Flexible deployment option—on-premises or in the cloud
- Works with IDC (Intelligent Data Capture)
- PO and PO acknowledgement documents are stored in DocStar repository

Header Level Matching	Line Level Matching
Order Date	Item ID
Vendor	Quantity
Ship-to Address (Includes Direct Ship)	Price
PO Number	Extended Cost
Carrier	Unit of Measure
Payment Terms	Unit Size
Required Date & Expected Ship Date	Expected Date & Expected Ship Date

See PO acknowledgement line item discrepancies highlighted in red compared to original PO line in yellow

Requirements

- DocStar Concurrent Users, Versions 20.2.108 and higher
- DocStar Workflow, Concurrent Users
- DocStar PO Acknowledgment Module
- DocStar Intelligent Data Capture (IDC) Line-Item Detail

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We're here for the hard-working businesses that keep the world turning. They're the companies who make, deliver, and sell the things we all need. They trust Epicor to help them do business better. Their industries are our industries, and we understand them better than anyone. By working hand-in-hand with our customers, we get to know their business almost as well as they do. Our innovative solution sets are carefully curated to fit their needs, and built to respond flexibly to their fast-changing reality. We accelerate every customer's ambitions, whether to grow and transform, or simply become more productive and effective. That's what makes us the essential partners for the world's most essential businesses.

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