



# From Order Entry to Epicor P21:

How Document Automation  
Ensures Business Growth  
and Agility



# Introduction

In today's challenging economic environment, delivering orders in full and on time is critical to maintaining happy customers, driving revenue, and increasing efficiency. Between expanding and contracting supply and demand, a potential economic downturn, supply chain disruptions, and more, digital transformation for manufacturing and distribution must be a business imperative.

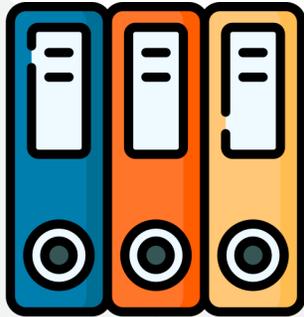
However, most organizations today still rely on manual data entry for processing orders and invoices. For every order submitted, there needs to be a human on the receiving end parsing through lines of part numbers and quantities to key each order into your Epicor P21 ERP system line-by-line. Over time, this process wastes thousands of hours while, overburdening your team and losing money. Additionally, because you must rely on humans to transpose data from one system to the next, it is inevitable that errors will occur, leading to unhappy customers, increased costs, and decreased revenue.

For manufacturers and distributors automating order and invoice processing, passing accurate data directly into P21 can become a competitive differentiator in today's complex business environment. In this ebook, we will walk through the key benefits of implementing a document automation platform, like Conexiom, that integrates directly into your ERP.





# Fulfill Customer Orders On-Time and Accurately



Whether you are a business owner, CFO, COO, or Head of Sales, the ability to fulfill customer orders on time and accurately is one of the primary metrics in manufacturing. That means a customer sends in an order and your company is not only able to ensure that the order is processed correctly, but that order is delivered to your customers when they need and expect the items. And, in today's world of immediate gratification, even B2B businesses are expected to process and deliver orders at the speed of Amazon.

However, if you rely on employees to manually enter orders into your Epicor P21 ERP, both metrics become challenging to achieve. Your Customer Service Representative (CSR) receives customer orders in various formats, like email, PDFs, Word Docs, and spreadsheets—to name a few. And even though you may have specified the fields that you need on each order, it doesn't mean your customers always follow that process. So, your CSR takes all these orders, toggles from application to application, and enters the data manually into P21. Meanwhile, since your CSR likely has multiple priorities, as she is processing the order, she might receive a call from a customer with a question that diverts her attention away from the data entry. By the time she gets back to that order, she's behind on delivering a rapid turnaround for her customer. Plus, because she got distracted mid-entry, the likelihood of errors increased exponentially.

For companies that want to ensure customers receive their orders on time and accurately, implementing a document automation platform, like Conexiom, decreases the time it takes to process an order and ensures that each order is processed with 100% accuracy.

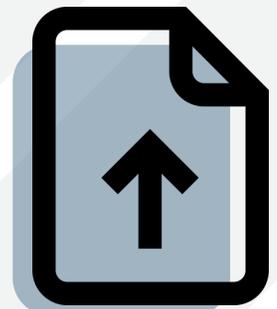
Conexiom's platform leverages a proprietary touchless automation technology that goes beyond your traditional OCR or RPA technology. By using pre-determined rules and logic, combined with our machine learning and automation engine, Conexiom delivers data into P21 seamlessly.

## Get Cash Faster

The faster you process your orders and deliver data directly into P21, the faster your business gets paid. And while realizing revenue has always been critical, it becomes even more important when facing economic uncertainty. To ensure that your business is more resilient and agile, you need to have a tighter grip on your cash flow—and that means getting invoices out the door and payment in hand.

Unfortunately, being bogged down by manual order and invoice processing impacts your ability to realize revenue. Not only does it take more time to enter data manually to process orders, but your ability to receive and process invoices is also impacted. Plus, you have to worry about order accuracy along the way because every time a customer gets an incorrect order, payment gets delayed.

By automating key document processing with Conexiom, you can seamlessly deliver data into P21 without relying on human entry, decreasing the time it takes to receive payment from your customers. Plus, Conexiom supports multiple document types like Purchase Orders, Accounts Payable Invoices, and Vendor Order Acknowledgements—all critical documents that work together to ensure every involved party achieves their ideal outcome.

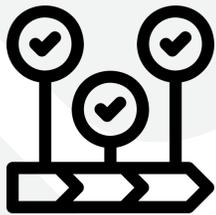




## Increased Efficiency



Manual order entry not only wastes time, but it also wastes money and increases overhead. Instead of allocating headcount dollars to your highest-value business initiatives, your employees spend countless hours entering data manually from one system to the next. Think back to our earlier example of the CSR who needs to handle a customer inquiry while she enters data—she must switch applications, stop what she is doing mid-stream, and not only is she more likely to process an order with errors, but she is also less likely to provide top-notch service to the incoming customer. Not to mention, when your employees are being bogged down by process inefficiency, they are more likely to experience burnout.



Additionally, if your technology systems are not connected to one another, you are reducing productivity and wasting time. When technology isn't streamlined, you will lose some of the value in your software purchase.



**Never underestimate the impact of sunk cost.**



By automating your order and invoice processing and ensuring that all orders are accurately input into your ERP, you can increase cost savings, fully realize the capabilities of technology you have already invested in, and re-focus key employees on moving the needle for your business—not manually entering data. In a time when retaining customers and getting the most out of your employees is even more critical to the success of your business, you can't afford mistakes and wasted time.

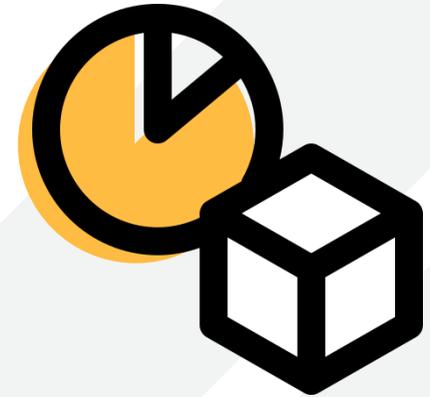
# Increased Customer Satisfaction

As we mentioned previously, today's customers expect immediate results. Even a B2B customer expects you to process and deliver their orders at the speed of Amazon. As a society, we've been conditioned to expect our orders to arrive immediately—often on the same day ordered – and even with supply chain challenges, your customers won't tolerate much wiggle room.

When your CSRs are manually processing documents, customer experience gets impacted in the following ways:

- Orders can be delayed
- Orders can arrive incomplete or incorrect
- Customer calls and inquiries might not get the attention they need

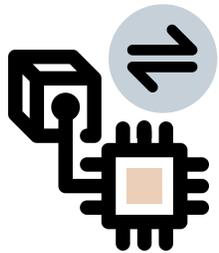
By automating order and invoicing processing with Conexiom, your customers can feel confident in your ability to get all their orders fulfilled fast and with 100% accuracy. Plus, because Conexiom can map document fields that align with your business logic and deliver them directly to P21, your customers don't have to change how they do business.



# The Conexiom Difference

For over a decade, Conexiom and Epicor have partnered to eliminate costly and error-prone manual processing of sales orders and invoices. Our extensive experience working with more than 150 Epicor customers enables us to truly understand your unique needs and assist you in maximizing business results and delivering a superior customer experience.

Conexiom provides the industry's only touchless order automation solution through the following features:



## Complex Data Transformation

Conexiom automates the transformation of millions of electronic documents, regardless of format, complexity, or repeatability.



## 100% Data Accuracy

Orders and invoices are transformed with 100% data accuracy at the line level.



## Touchless Transactions

Conexiom uses proprietary machine learning algorithms to eliminate manual processing and allow your team to focus on delivering an unparalleled customer experience.



# Conclusion

Today's manufacturers and distributors must be agile to respond to changes in the economy, supply chain slowdowns, increased customer expectations, fluctuating consumer demand, and the need to accelerate digital transformation. Relying on people to manually process your critical documents is no longer an efficient way to grow revenue. Instead, companies must embrace document automation and digital transformation to ensure that your organization can be resilient, no matter what obstacles you may have.

To learn more, visit  
[conexiom.com](https://conexiom.com)

