

Order Automation Salesforce Solution



Many B2B manufacturing companies are still relying on outdated and manual processes for placing and fulfilling orders. Whether by email, phone, or a rep-managed portal, these solutions place a strain on employees and provide a sub-par experience for customers.

Delivering Order Management Efficiency

Our Order Automation solution helps you establish an integrated back-end system that makes order processing, execution, and visibility easier.

The baseline solution works with a range of ERPs and other platforms, though does require Salesforce Sales Cloud or Service Cloud. We can then further customize or advance the solution to meet your needs.

Here's how it works.

- A customer's order, sent via email as a PDF, is processed using intelligent document processing (IDP) and robotic process automation (RPA) and logged in Salesforce.
- The document is then converted into an order in Salesforce OMS.
- OMS is configured to deal with your company's custom order flows and needs.
- Salesforce OMS is integrated with the company's ERP (such as SAP) for all order servicing.
- Also integrated is the company's email platform to send updates directly to the customer.



An OMS and RPA Offering in 14 Weeks

Our team of Salesforce and MuleSoft analysts, developers, architects, and specialists work alongside you every step of the way to ensure our solution is tailored to your business needs. Our comprehensive, sprint approach provides you with a fully functional solution in as little as 14 weeks (dependent on scope).

And because we are not in the business of shutting down after the launch, we also offer additional post-launch support and ongoing managed services to keep your investment optimized.



Our Solution Components

1. Customer portal
2. Imported existing product, pricebook, and contract data
3. Automated processing of incoming orders from a mailbox or file system into Salesforce (and subsequently, the ERP)
4. Integration of order status from ERP back into Salesforce
5. Order report for internal users

Our Proven Process

- Discovery
- Definition and design
- Build and configure
- QA testing and issue resolution
- Client acceptance testing
- Launch
- Post-launch support