transcendSO

Sales Order Automation

Fewer errors and increased processing efficiency mean happier customers.

Effective and efficient sales order processing implemented through Optima's transcendSO intelligent automation capabilities assure that accurate and error-free order data is posted to the ERP. Customer purchase orders arrive from diverse sources: (email, Fax, XML, EDI, etc.) and having different formats are captured, relevant data is extracted and validated against the ERP master data. The solution provides automated user notification of exceptions and conversion of approved orders to sales orders. With transcendSO you can:

Accelerate order processing
Able to process orders arriving from multiple sources to improve order cycle time.

Improve customer inquiry response time.
Real-time access to all critical information facilitates customer service rep response time.

Avoid costly mistakes
Intelligent automation capture, extraction, and validation essentially eliminates manual processing by up to 90%.
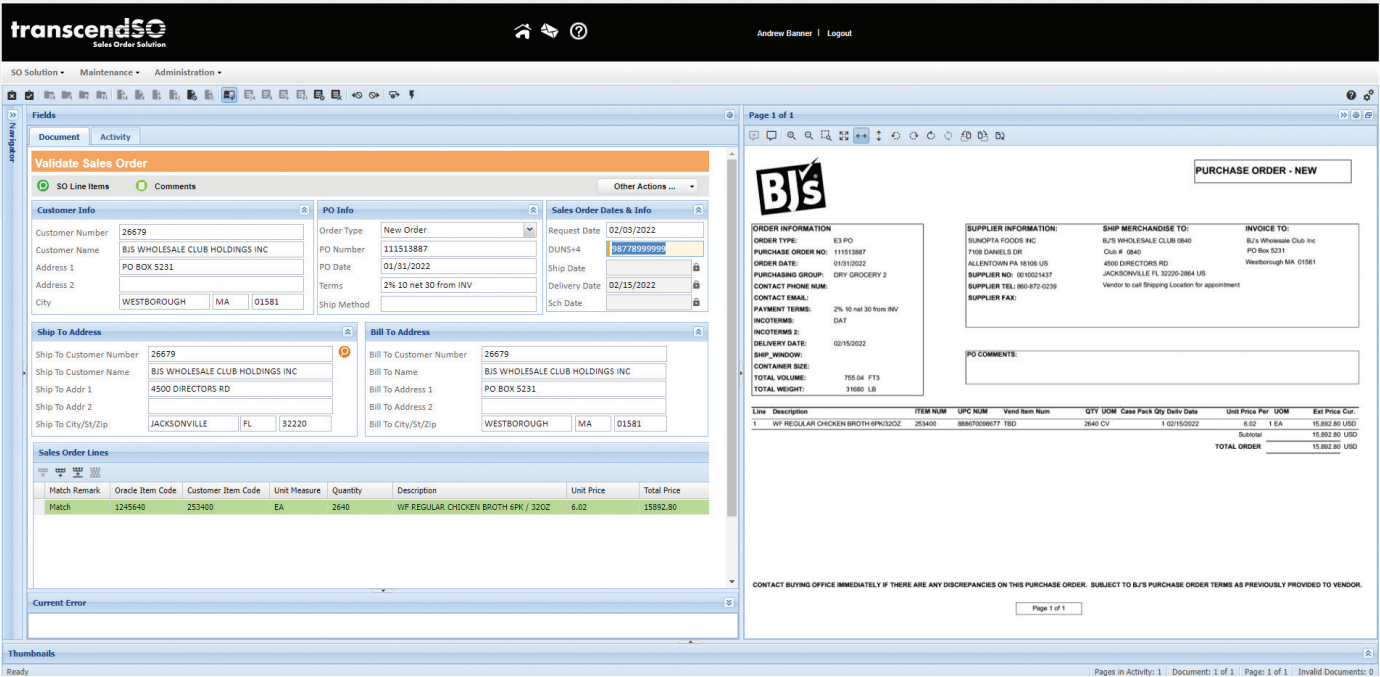
Manage cash flow more effectively
Shortening the time from purchase to order and invoice delivery improves cash flow.

INDUSTRY ACKNOWLEDGMENT

☆ 2020 Kofax Partner Solution of the Year Award

☆ 2018/2015 NJBIZ - 50 Fastest Growing Companies in New Jersey

☆ 2016 Kofax Inspire Award - Financial Process Automation Solution of the Year

☆ 2016 Kofax Ignite Award - Partner Solution of the Year

☆ 2015/2011 Inc. 5000 - Fastest Growing Private Company in America

☆ 2011 SI 100 - Top 20 IT Services Company

PRODUCT FEATURES

- Orders arriving from multiple input sources are straight-through processed and posted to your financial application in real time

- Automated data capture and validation assures accuracy of all relevant data and computed values such as totals and taxes

- Automatically converts customer data to ERP codes (e.g., Item Code and UOM to your ERP's Item Code and UOM

- Dynamic learning recognizes unique attributes of orders, assuring continuous improvement

- Provides work queues for processors to address orders pending approval or exceptions

- Supports multiple country rates, tax formats, currencies, and character sets

- Supports multi-line item and multi-page purchase orders

BUSINESS BENEFITS

- Multi-channel intelligent capture provides a single source of truth for all incoming data

- Timely and accurate order information enhances customer satisfaction

- Customer service reps can quickly address customer inquiries

- Purchasing departments are better able to accurately forecast inventory

- Billing departments gain timely access to sales orders to validate order fulfillment and generate invoices

- Developed on Kofax Intelligent Automation Platform for supporting additional Optima Global or custom solutions