ARTSYL | **Intelligent Process Automation** | For **Acumatica** The Cloud ERP

Acumatica CERTIFIED APPLICATION · FULFILLED BY Acumatica The Cloud ERP · OA

OrderAction

AR Automation – Solution Brief

Accelerate Order processing with Artsyl's OrderAction

ABOUT Customer Order Automation
What Happens when Customer Order information is NOT data yet?

OrderAction is a comprehensive end-to-end Order processing automation solution which accelerates the availability of validated Order data in Acumatica. Based on Artsyl's Intelligent Process Automation (IPA) platform, OrderAction has pre-configured *process specific* automation bots with foundational Order processing intelligence which utilizes transformation technologies such as; Robotic Process Automation, AI Cognitive Services, Machine Learning, OCR/ICR, and iPaaS and more. OrderAction accelerates the availability of validated Order data in Acumatica.

CHALLENGE

Before you can transact Orders, manual processes to extract and validate data from Orders is slow, error prone and resource intensive. This causes delayed revenue, poor customer satisfaction and late or duplicate payment errors to suppliers.

This diminishes your investment in Acumatica to help your business more efficient, competitive and sustainable

SOLUTION

OrderAction automates all the manual steps to process aCustomer Order. End-to-end.

Transform text to data, validates this data with your system databases and routes Orders for Approval and/or exception resolution.

Fully integrated with your ERP, OrderAction enters data in the appropriate modules an/or other platforms for collaboration or compliance requirements

Transform This
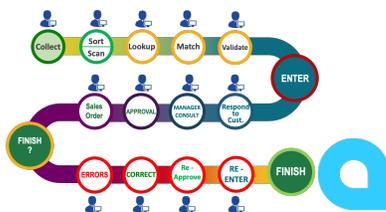
Into This

USE CASE Customer Order Automation (AR)

A Wholesale Distribution company has thousands of Orders that come in for fulfillment from hundreds of customers with various entry points and file formats. The cost of processing Orders manually increases with company growth and jeopardizes customer satisfaction and financial performance in the future.

OrderAction will monitor all entry points, ingest the Orders in any format, classify them by customer, extracts, validates and enters relevant data into financial systems. This enabled a reduction in the Customer Support resources and improved Order fulfillment accuracy while reducing Days Sales Outstanding (DSO) liabilities per quarter .

65% Reduction
Days to Process
13 → 4

60% Average overall reduction in processing costs with Order Automation

78% Savings
Cost per Document
$13.00 → $2.85

59% Reduction
Exception Rate
18.2% → 7.4%

Did You Know?

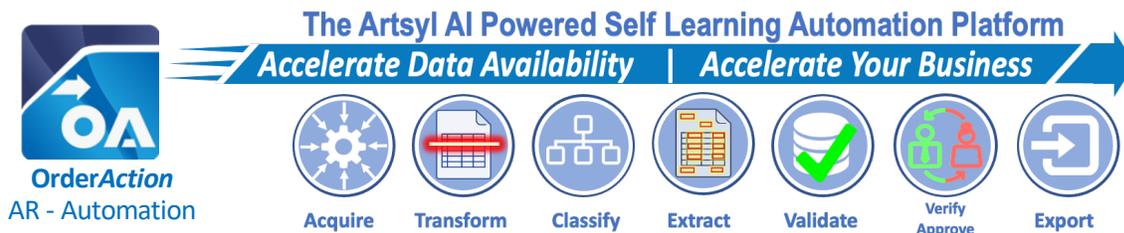**InvoiceAction** complements OrderAction bringing the same efficiencies to AP Invoice process automation

ARTSYL
Intelligent Process Automation

For **Acumatica** The Cloud ERP

Acumatica CERTIFIED APPLICATION

FULFILLED BY Acumatica The Cloud ERP

OrderAction

Business Efficiencies

1. Optimizes cash management
2. Reduces operational costs
3. Increases transparency
4. Platform can be used for any document-based business process

Improved Worker Efficiencies

1. One unified workforce of technology and people
2. Increases data accuracy from Orders
3. Increases user productivity
4. Accelerates approvals
5. Continuous improvement - Minimizes exceptions

ENTERPRISE BENEFITS

OrderAction
AR - Automation

The Artsyl AI Powered Self Learning Automation Platform
Accelerate Data Availability | Accelerate Your Business

Acquire | Transform | Classify | Extract | Validate | Verify Approve | Export

---

HOW IT WORKS

Order action can be deployed as a Cloud or On-Prem subscription.
All bots have foundational intelligence which are customizable to meet your specific requirements.
As Orders come in, they are picked up and processed, routed for approval and entered in financial systems. *Spend more time working ON your business and less time IN it!*

Acquire: Monitors or searches various input sources, including email servers, Network file shares, Web-Portals, Fax, integration with scanners. Registers invoices with Invoice Action.

Convert: OCR – IWR – OMR
Transforms embedded text (Scanned, PDF, tiff, fax ....) to machine readable data. AI and OCR engines are used in combination based on document type to assure highest data extract accuracy.

Classify
Sorts Invoices by vendor, and assigns the proper process for extraction, validation, business rules and data entry.

Extract
Extracts data based on classified vendor and by utilizing:
- Generic foundational InvoiceAction intelligence.
- Machine Learning intelligence from prior user actions.
- Dedicated definitions based on customer customization requirements.

Validation | Matching
Could be the single most important step for time and resource savings. Also ensures the proper process is followed and data entered is highly accurate and most current.
- Performs arithmetic checks of itemized tables with sub-totals and totals
- Matches relevant extracted data from invoices with internal databases.
- Substitutes extracted data with most current database information.
- Returns database information that is not on the invoice but required for either approval, exception resolution or as supporting information.

Verify | Approve
Routes and notifies proper Approver
- Reviews | inputs data | makes comments | Approves
Routes to Exception resolution resource.
Presents document image and data to Users to address any data extraction or business rules violations.

Data & Image Entry
Enters data and invoice image into proper ERP or financial system. The data and image can be split and entered in multiple business applications

---

Machine Learning

Continuous Improvement
As users are performing actions such as making corrections or adding newly required extraction fields or on-boarding new Customers, **Machine Learning** is recording all user actions – such that the next time through, it will have learned and not cause the same exception again.

Did You Know?
InvoiceAction complements OrderAction bringing the same efficiencies to AP Invoice process automation

Request a Demo Today

LEARN MORE**:** **Acumatica Marketplace**

Request a Demo Today

IPA Platform Factsheet

Architecture

Framework	.NET	SQL Server	SOA	WCF	Open .NET API	Multi-tenant
Core Platform	Auto Registration	Recognition	Batch Manager	docAlpha Server	Statistics Server	Export
User Clients	Thick & Thin Verification	Approver	REST API	Portal	Image Acquisition	Scanning
Admin. Services	Administration Station	Monitoring Station	Design Station	Web Monitoring & Dashboard
Cloud	Azure - Multi-tenant	Artsyl Cloud to Cloud support
Data Extraction	Artsyl utilizes and provides you best-in-class technologies. Hand-print	Text and Checkmark recognition	Signatures	Automatic redactions OCR: Nuance, A2ia, Tesseract , MS AI · · · · ICR, IWR: OpenText (RecoStar)	A2ia Check Processing: A2ia · · · · · · · · · · Barcode (1D, 2D, patch codes)
OCR Languages UI Localizations Currencies	OCR supports over 100 languages UI localized for: English	German	French	Spanish	Russian	Chinese Multi-currency processing support Supported extractions: AUD	CAD	USD	GBP	JPY	TWD	CHF	CNY
ERP Integrations	Acumatica |MS Dynamics	SAP B1	Oracle-NetSuite	EPICOR	SAGE-Intacct	ERP	SYSPRO | Harris	IFS	Infor	QAD	QuickBooks	IPaaS	Cloud to Cloud
ECM Integrations	CMIS	Altec	App. Extender	DocStar	DocuWare	FileBound	ImageTag	LaserFiche | MaxxVault	OnBase	PaperVision	Questys	SharePoint	WebDocs
Deployment Options	Cloud and On-Premise	36 Month Subscriptions Cloud Options: Cloud to On-Premise	On-premise to Cloud	Cloud to Cloud

Notable Features

Intelligent Data Capture	Acquire	Classification	Data Extraction	Validation	Document routing
User Wizards	Easy to use wizards guides users through data verifications	rules validation	escalations
Included Clients	USER: Approvals - Comments| Portal	Dashboard Power User: Verification	Machine Learning	Monitor	Scan	Image acquisition
Machine Learning	▪ Learns from User actions making it easy to create and/or update profiles ▪ Easily defines extraction fields with "Click-capture" ▪ Contextual anchors	Self Learning Tables	Cascading Static Text Binding ▪ Amends and takes priority over Profile Definitions and can be shared throughout the enterprise
Data Extraction Confidence	Each data field's confidence level can be prioritized such that only mission critical data has high confidence threshold. This minimizes character confidence exceptions.
Classification	Classifies and provides most current information via cascading database lookups, minimizing OCR extractions and verifications
Validation	▪ Quotes	Customer Credit	Price Matching	Item Availability	Terms	Shipping ▪ Performs line-item arithmetic checks and line-item data against host system databases. ▪ Returns the most current information via cascading lookups ▪ Validates business rules, applies action and routes documents for Verification and/or Approvals
Approvals	▪ Logic based routing of Orders to appropriate resource ▪ Customizable data fields and User views