



Ebook

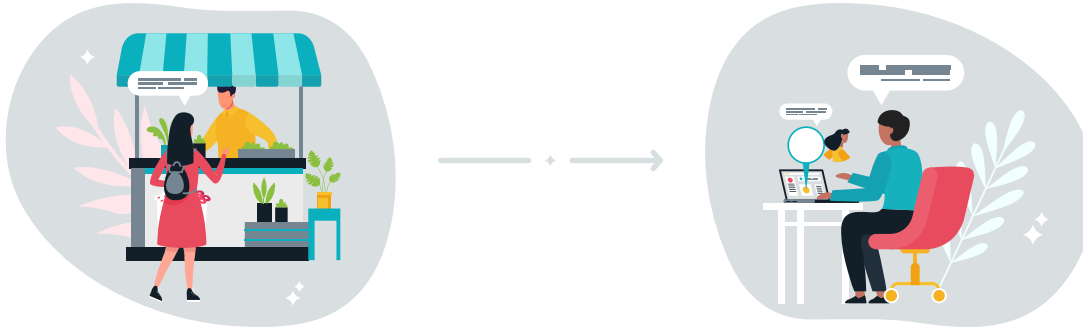
# Making Multichannel Order Transmission Easy for Everyone



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# Capturing orders, then and now



Believe it or not, merchants of yore used to have a similar approach to order placement as we do these days: the order was received through a variety of channels – person-to-person, a hand-written list, or later by telephone. The idea is, still, kind of the same, only that now the handwritten note is a smartphone or computer and the clerk is increasingly a robot that picks the items from enormous warehouses.

Now, with all the latest technologies adding layers of both ease and also some level of complication, modern-day B2B vendors need to re-conceptualize the entire sales process, from products, to prices, IT systems and workflows, to keep up with the changing demands of business purchasers. Leveraging the evolving technologies, increasingly focused on AI, can make a multichannel order management process as easy for the Customer Service teams as for the purchasers themselves.

**This ebook showcases how AI-driven technologies can optimize and streamline these processes, so that the customer receives the correct order at the right time and the right price.**

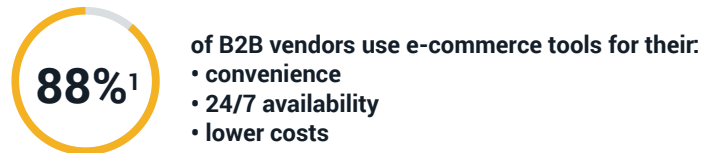
# Digital shopping: B2C habits inform B2B processes

In the B2C world, businesses increasingly focus on creating a seamless customer experience across all channels, referred to as omnichannel ordering. This way, a customer can start the buying process in a store, follow product updates and special pricing on social media, and make the final purchase on the web.

Having evolved to make things easier for everyone, these changes in B2C also spilled over into B2B ordering, as buyers have the heightened expectations for convenient purchasing in their professional life as in their private life.

Purchasers in the B2B market were also able to avoid some detrimental effects of sluggish supply chains and cash availability on company finances by making use of the digital ordering pathways during the COVID-19 pandemic. Some of the specifics are different for B2B transactions as well: they usually involve larger order quantities, more detailed specifications and longer lead times.

This is why more and more B2B vendors are adopting the multichannel approach for purchasing.



...with the result  
of watching their  
revenue grow by



<sup>1</sup> Main, Justin. "3 Trends Driving the Consumerization of B2B E-Commerce." Forbes.com, Nov. 28, 2022.



# Challenges with common B2B order channels

The only way to make order management hassle-free for everyone is by giving customers a choice as to how to place their orders while ensuring that your business has the best tools for processing these efficiently.

Unfortunately, despite falling under the “automation” umbrella, many common B2B order solutions only appear more efficient. Partial solutions too often result in errors that still need to be corrected, missing data that has to be completed and customer questions that require answering.



## **EDI:**

This standardized electronic exchange of business documents between two parties is admittedly pretty convenient – as long as both parties agree on the formats. But maintenance costs can be high, and not every company is equipped to handle the resources of maintaining such a system. Forcing your customers into a system is, of course, the complete antithesis of “customer satisfaction.”



## **E-commerce channels:**

This seems like one of the most customer-friendly ways of placing an order. However, sometimes a Procurement team needs to place orders directly from their ERP, which means that they will have to retype everything into the supplier's web portal. For orders with a large number of line items this is simply not feasible.



## **OCR tools:**

Optical Character Recognition (OCR) is often considered a cost-effective way to read documents such as orders or invoices electronically. The problem is that, on its own, this tool is not sufficient, as it can read the information incorrectly and mostly does not have the capabilities to “understand” the information or verify it against other data.



# Order management automation

## What starts digital should stay digital

Now that orders are placed digitally, the next steps in the fulfillment process should ideally remain in the digital realm. Any conversions to different systems or manual steps only result in a higher potential for errors and a delay in getting the delivery to the customer. Additionally, the supplier will not be able to accommodate an increase in digital channels or accompanying order counts.

Order management automation enables the digital processing and tracking of orders, facilitates decision making with data-driven insights, and accelerates the entire order process so that customers receive the “perfect order.”

How customers place their order should not negatively impact this process. Whether it's through an e-commerce portal, EDI, or the various forms an email order can be placed, automation solutions should be able to handle them all. And while it's important that the purchaser preferences for order placement are catered to, what counts even more is what happens in the process after transmission.

An order management system that integrates directly with the ERP and can keep up with whatever the digital transformation throws at it next can create deeper levels of future-proofing for a business.



### What is a perfect order?

It's simply receiving the right products, with the right quantities, at the right time and place, with the right corresponding invoice.



# Esker Order Management

Order management automation is not unlike the general store clerks that had to decipher a customer's handwriting on a hand-written list. But now order reception, data extraction and routing to the applicable queues get a helping hand from Esker Order Management packed with AI functionalities. These not only optimize the entire process but also manage workflows and deliver valuable data insights.

AI capabilities such as NLP, OCR, machine and deep learning make it possible to correctly extract and verify data with high and continuously improving accuracy.

## Formats processed with Esker Order Management

**Structured formats:** EDI, other e-commerce platforms & more intricate channels like punchout catalogues & mobile devices



**Unstructured formats:** free-text emails or chat messages



**Semi-structured formats:**  
PDFs & spreadsheets



# Where does the robot come in?

Esker isn't making any robots... yet!

We do, however, pack our solutions with all the helpful tech that is available, including a variety of AI capabilities. These positively impact every step of the ordering process.



## Order reception & triage:

- Not only are both structured and unstructured formats received and accurately read by the solution, but the relevant data is extracted, verified, and the order then routed to the appropriate queue for further processing.
- When corrections are made to the information, machine learning algorithms jump into action and take these into account for the next time.
- Additionally, anomaly detection features point out when order amounts or item numbers are out of the ordinary range for return customers.



## Automatic ERP integration in real time:

- The order is simultaneously created in the ERP with the minimum of touches necessary and archived for the specified time, leaving a full audit trail.
- While Esker does not perform any direct warehouse inventory management, the integration with the ERP creates an accurate and up-to-date overview of product availability.



## Changed orders or returns:

- These are more easily managed when intelligent automation technology takes on the complicated data extraction tasks. Reconciling the claim with the original order is performed automatically, rather than printing out the document and comparing them manually.



## Spotting atypical quantities:

- AI will identify if order quantities or amounts are out-of-the-usual for that customer, based on historical records. CSRs can then easily reach out to verify the order, with the communications tracked for future reference.





## ZIMMER BIOMET

The merger between Zimmer and Biomet resulted in an additional 20,000 orders per month, which the team would not have been able to process without Esker. The ability to receive and process orders independent of format had an enormous impact on how streamlined the whole process now is.

[Read full story](#)



**“The dashboards really help us see the remaining orders in the pipeline and what we need to do before the end of the day.”**

**Eric Bertorello**  
EMEA IT Sales Region Leader,  
Zimmer Biomet



Accord Healthcare is a leading multinational pharmaceutical company. Its Spanish subsidiary receives more than 6,500 monthly orders, primarily from hospitals and pharmacies by fax, email and EDI. Before automation, four Customer Service team members divided the fax and email orders by geographical zones and manually entered them into the company's ERP system. EDI orders were printed out which often delayed fulfilment due to the many steps involved.

Esquer Order Management automatically splits all received orders by product type, then routes and assigns them to the right CSR according to geographical zone. This makes the order reception virtually touchless, and even Excel files with multiple line items can be easily managed.

[Read full story](#)



**“Even if a CSR is temporarily unavailable or on vacation, order processing is not delayed. The complete visibility we have over our order process and the reduced time it takes to process each order, including EDI, has greatly improved our efficiency KPIs.”**

María Carmen Cano  
Head of Customer Service & Commercial Admin,  
Accord Healthcare

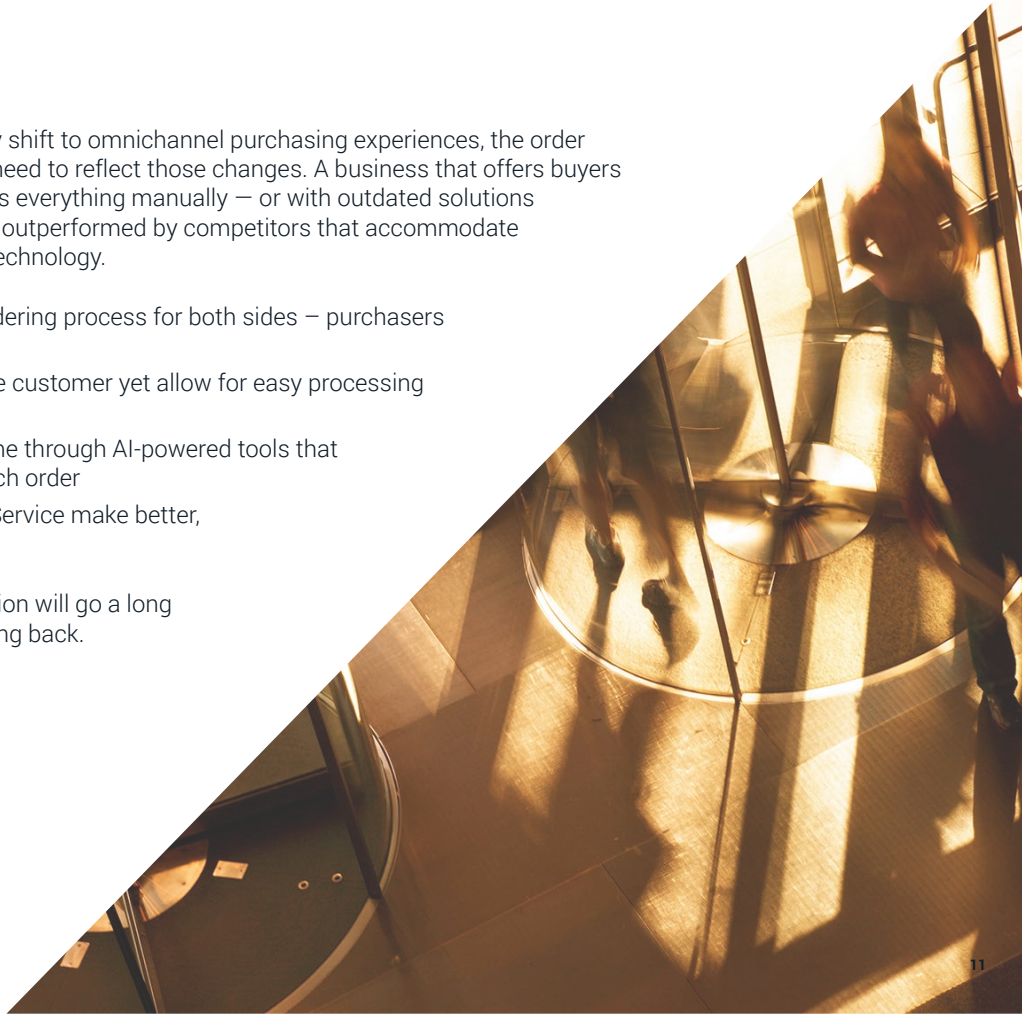
# Conclusion

As retail customer interactions increasingly shift to omnichannel purchasing experiences, the order management systems for B2B purchases need to reflect those changes. A business that offers buyers a new way to place an order yet still handles everything manually – or with outdated solutions – behind the scenes, runs the risk of being outperformed by competitors that accommodate customer expectations and leverage new technology.

Esker Order Management facilitates the ordering process for both sides – purchasers and suppliers – with:

- Order reception methods that work for the customer yet allow for easy processing on the vendor side
- A reduction of both errors and delivery time through AI-powered tools that learn and become more accurate with each order
- Data-driven insights that help Customer Service make better, faster decisions.

Implementing order management automation will go a long way in keeping customers happy and coming back.



# Hi, we're Esker

Founded in 1985, Esker is a global cloud platform built to unlock strategic value for Finance, Procurement and Customer Service leaders and strengthen collaboration between companies by automating source-to-pay (S2P) and order-to-cash (O2C) processes.



## 39

years of experience with 20+ years focused on cloud solutions



## 1,000+

employees serving 850k+ users & 2,500+ customers worldwide



## 15

global locations with headquarters in Lyon, France, & Madison, WI



## €178.6

million in revenue in 2023, with 90+% of sales via SaaS activities



## Business success is best when shared

At Esker, we believe the only way to create real, meaningful change is through positive-sum growth. This means achieving business success that doesn't come at the expense of any individual, department or company — everyone wins! That's why our AI-driven technology is designed to empower every stakeholder while promoting long-term value creation.

