

The Order Process Automation Playbook

*Proven Steps to Accelerate Accuracy,
Efficiency, and Fulfillment Speed*



Why Order Process Automation Drives Success

Purchase orders, sales orders, and bills of lading all contain valuable information to ensure smooth deliveries and communicate with customers, but this information is often siloed, leading to error-prone, duplicate data, and communication gaps between departments.

Order process automation using Intelligent Information Management (IIM) connects your staff and systems, enabling effortless, efficient processes. Here's why:



Manual data entry carries a [1-2% error rate](#) across invoices and purchase orders.



Shipment data is often lagged [23 days](#) due to manual processes.



Leading organizations are [63% more likely](#) than their peers to use automation to improve order throughput.

What You'll Find in This Playbook

This playbook outlines the benefits of order process automation, its importance for an efficient, connected business, and the crucial order process automation tools within intelligent information management systems to help you drive success.



Leaks in Your Process Without Order Process Automation

Customers expect fast service and communication from vendors, but achieving these expectations is often hindered by manual processes.



Inaccessible Information



Lack of Customer Transparency



Costly Errors



Monotonous Data Entry



Lack of Process Visibility



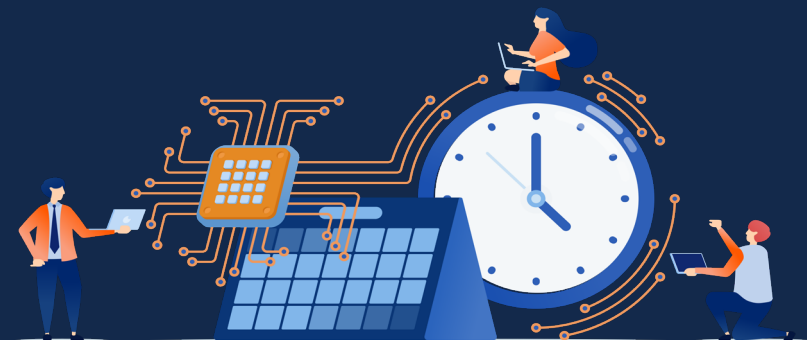
Compliance Risks

Quick Quiz: What are Manual Order Processes Costing You?

(1 point for each question that applies to your organization)

- ☐ Is entering data from purchase orders, sales orders, and bills of lading time-consuming and error-prone?
- ☐ Does validating information on sales orders and bills of lading take valuable time?
- ☐ Is order fulfillment slow and inefficient?
- ☐ Are service calls with customers bottlenecked by inaccessible information?

If you scored a point for even one of these issues, order process automation can provide substantial benefits for you.



Key Components of Effective Order Process Automation

Integrations enhance collaboration, information access, and efficiency by connecting information across your systems and automating additional tasks. But even with these benefits, a poorly implemented integration can set back your ROI immensely. The following steps will help ensure your integrations provide real, tangible value.

1. AI-Assisted Capture Automation



Eliminate errors and duplicate data entry for purchase orders, sales orders, and bills of lading. Ensure your teams have convenient access to all the information needed to fulfill orders, answer customer questions, and collaborate across departments.

2. ERP Integration



Route data from your documents directly to your ERP system of choice to effortlessly create sales orders and bills of lading. Gain complete oversight of data and processes for fulfillment, shipping, accounting, and more.

3. Automated Workflows



Effortlessly route purchase and sales orders for review and automate customer emails to keep them informed throughout the process.

4. Easily Searchable Archives

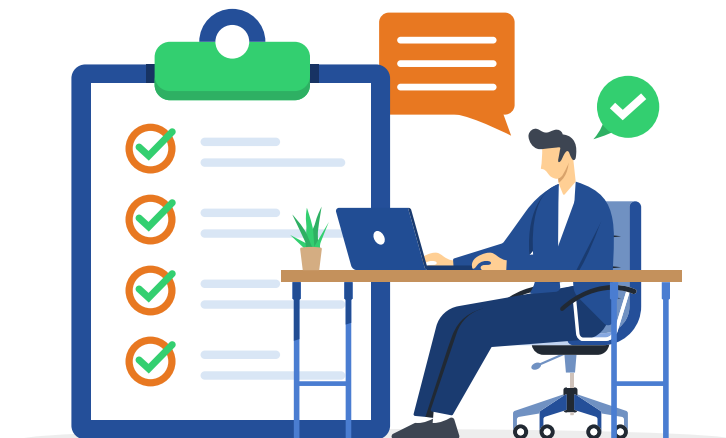


Retrieve the documents you need from a secure repository with just a few clicks. Manage compliance using tools such as audit trails, account-based access, and version control.

5. AI Document Summarization



Speed up the review process for your order documents with near-instant summaries of key fulfillment terms to reduce errors and deliver on time.





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Why Square 9

Square 9 Softworks is a generative AI-powered platform that removes the frustration of extracting data from documents, forms, and all external sources, so you can harness the full power of your information. Release your team from repetitive tasks while your work flows freely in areas like accounts payable, order process automation, onboarding, contract management, and more. The Square 9 platform captures your unstructured content, transforms it into clean, searchable data, and securely shares it across your organization to accelerate your decisions and actions.

Contact Square 9 for a no-obligation discovery session and see how transforming your organization can lead to more efficient, secure, and informed processes.

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