

Powered by AI and Machine Learning



Capture

Automatically and accurately capture emailed sales orders from your customers, distributors and partners.



Validate

Automatically validate and enrich the data extracted according to your specific business rules, price and policies.



Process

Automatically acknowledge the order, manage exceptions and route documents to the correct person if approval or manual intervention is required.



Integrate

Post sales order to your ERP, CRM or other internal systems as required.

Sales Order Automation

Automatically capture emailed orders and process with no manual order entry. Save time and reduce errors.

iDocuments Sales Order automation is simple to deploy and uses Artificial Intelligence and Machine Learning powered technologies to ensure that you never miss or lose an order.

- No manual keying of orders: 90%+ orders can be automated.
- Your customers experience faster response times and improved service.
- Orders are automatically captured, validated, processed and archived in seconds.
- Orders are automatically routed for exception handling via web interface or mobile app.
- Orders can be retrieved and queried quickly from the archive using Smart Search.

CAPTURE

Customers and distributors email their orders and attached PDFs. iDocuments uses AI and machine learning powered technology to automatically capture data from the order at header and line level and then archive documents and data.

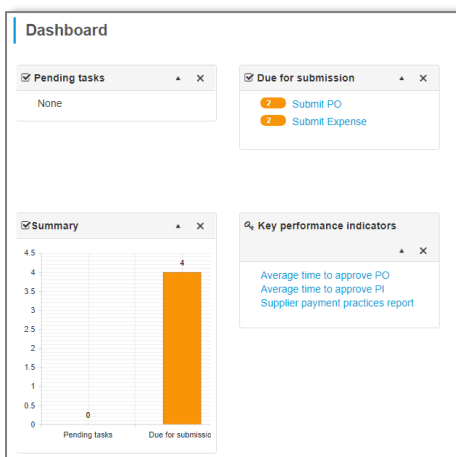
VALIDATE

Data is automatically validated to comply with your specific business rules and criteria. The order data can be enriched automatically with up-to-date pricing, discounts, tax codes and analysis information from your internal systems.



Work anywhere

iDocuments is available as web-browser interface, iPhone or Android app.



Never miss or lose an order.

IDOCUMENTS APPLICATION FRAMEWORK

iDocuments incorporates a standard framework and set of tools that are designed to simplify day to day business activities, reduce manual and repetitive tasks and improve control and visibility.

Web browser-based user interface

A state-of-the-art web browser-based user interface makes the system easy to learn and simple to use so your team can focus on running the business.

Mobile apps

iPhone and Android phone apps allow budget holders, cost centre managers and other approvers to review and approve documents whilst on the move as well as enter expenses, timesheets and time-off requests.

Seamless finance system integration

One of iDocuments major strengths is its integration with your existing ERP or finance system which ensures consistent and accurate information and financial management reporting across your entire business.

Dashboard

iDocuments incorporate a flexible dashboard facility which can be personalised for each user. The dashboard provides users with details tasks requiring their action and operational managers with a rich, accurate and timely view of their area of the business.

Archive and retrieve documents using *Smart Search*

iDocuments incorporates an integrated digital document archive with an intelligent Smart Search facility enabling authorised users to quickly locate documents and associated information.

IDOCUMENTS APPLICATION FRAMEWORK - continued**Powerful workflow engine**

The iDocuments workflow engine allows you to define rules for automatic routing of documents for review and authorisation by the correct budget holder or cost centre manager. Out of budget requests can be automatically directed to another approval path.

Automatic out of office workflow routing

Approvals are automatically re-directed when authorisers are out of office on holiday or on other absence.

Flexible business rules and application configuration

iDocuments business rules and configuration allow you map the system to your specific business needs, requirements, policies and information sources.

International reach

iDocuments is a multi-company, multi-language and multi-currency solution.

Automated alerts and notifications

Automatic alerts and notifications such as overdue approval reminders cut-out bottlenecks.

Audit trail and history

A full audit trail and history of all document transactions is maintained to provide comprehensive visibility and transparency.

Business ready KPI and analysis reports

The system is delivered with a comprehensive range of business ready reports to provide you with real-time information to help you manage your business and help you make better and more informed decisions.

Focus your sales team on customer service not manual order entry.

