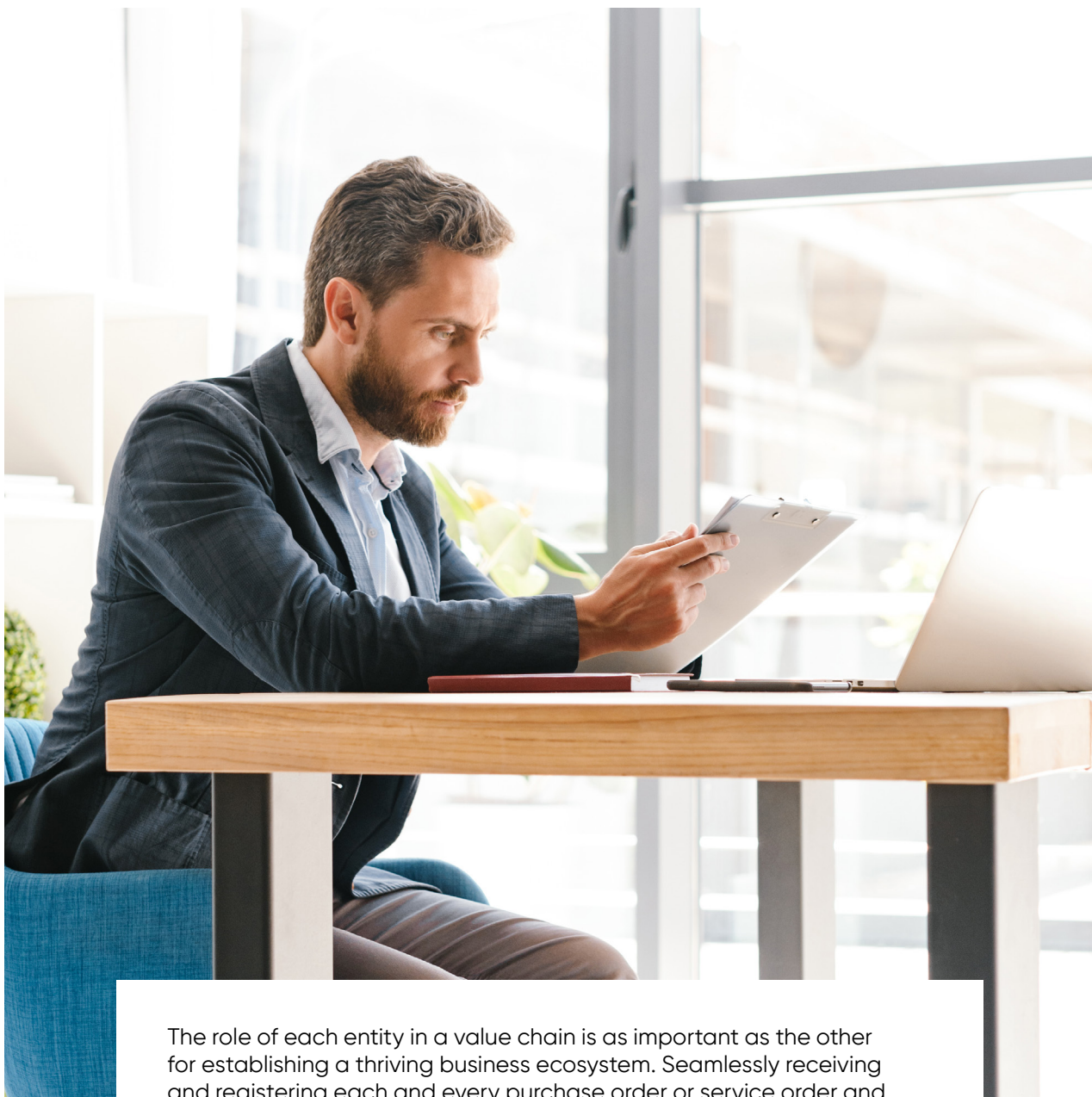




## WHITEPAPER

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# ACCELERATE ORDER PROCESSING WITH A DIGITAL O2C AUTOMATION PLATFORM



The role of each entity in a value chain is as important as the other for establishing a thriving business ecosystem. Seamlessly receiving and registering each and every purchase order or service order and prioritizing the order execution and meeting commitments is imperative for the business. A value chain involves high interdependencies, and hence the Order to Cash mechanism has to be less human-dependent and fool-proof. **Order to Cash (O2C) Automation** is the first leg in establishing a successful value chain.

# PROBLEM STATEMENT

Order processing is a tedious process in a just-in-time value chain. Prioritizing order processing as per customer standing, timely payments, creditworthiness, and multiple other criteria and receiving the cash in time for sustained operations is a mammoth and error-prone manual task.

## SOLUTION

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**Intelligent Automation** backed Order to Cash (O2C) platform allows businesses to improve the efficiency across all the touchpoints in order processing. It enables them to seamlessly tap the orders in an omnichannel environment and prioritize them in real-time for further processing and receiving payment for sustenance, growth, and expansion. AI / ML component of the Intelligent Automation platform provides cognitive identification and prioritization to process the orders through different gates -

### 01 | Order Receipt and Management

An automated platform that integrates the customer relationship management system with the order management system ensures that each and every purchase order is received. The integrated approach eliminates the oversight and delays that accompany manual order management and processing. This data can be integrated further with the core business systems and F&A systems. This Intelligent Automation platform ensures that all the orders are efficiently received and managed, inward and outward inventories are monitored throughout the fulfillment cycle, and sales are tracked for final P&L calculation.

### 02 | Credit Management

This is a crucial stage in the automated O2C platform where a customer's financial standing is analyzed through reviewing its payment history, third-party sites, and social media presence. This study assumes great importance before accepting new and fresh incremental orders. The automated O2C platform adds immense business value by segregating defaulters and late-paying customers to minimize risk exposure to the business. It allows to reinforce automated credit limits and advance payment clauses as per the credit history, credit scores, and creditworthiness of the customers. The platform also allows businesses to analyze credit history for cross-selling and up-selling products and making bundled offerings.

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## 03 | Fulfillment

Once the order is prioritized for execution, the product assembly and services department fulfill the order as per the SLAs. They tick off the fulfilled criteria as per the assigned order number and key in remarks and append the corollaries, if any, for the digital invoice generation.

## 04 | Invoice Generation

After the product or service is delivered, the automated O2C platform fetches details from purchase orders that are integrated with the ERP or core business system, any other corollaries that are appended by the product or service fulfillment team, and generates the invoice. An integrated, common platform for all fulfillment-related documents and interactions allows businesses to generate digital invoices to be sent through a digital medium to the customer. The approach eliminates manual errors and invoice processing overheads.

## 05 | Payment Receipt

A digital, integrated fulfillment and invoice platform also allows customers to make digital payments. At times, an independent customer portal allows the customers to see the order processing progress, fulfillment status, digital invoice, etc., and promptly make payments. Digital engagement saves time, effort, and costs for both the business and its customers. This approach improves the overall efficiency of the entire value chain.

## 06 | Cash Application

On receiving customer payments in the business' account, the automated cash application approach allows the business to reconcile payments received with the invoices and orders at an accelerated pace. It allows them to tide over an otherwise tedious and error-prone manual process.

## 07 | Reporting and Dashboarding

The automated digital O2C platform allows businesses to generate standard as well as DIY reports and dashboards to understand the real-time status of orders, fulfillment, and cash flow. It allows the business to identify the impediments and actionable insights to improve its operational efficiency.

# BENEFITS OF AUTOMATED O2C PLATFORM

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The automated O2C platform provides a transformational approach to the business and its order processing mechanism and –



Offers a fool-proof catchment area for tracking purchase orders from all channels



Automatically tracks customer journey from order receipt to cash collection



Performs credit analysis in the fraction of the time required for manual analysis



Allows to transition to digitally signed invoices and digital payments platform



Ensures a sustained cash flow irrespective of force majeure events



Accelerates the payment reconciliation & closure across the bank and business records



Offers seamless real-time reports across an integrated digital platform





# CONCLUSION

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The automated O2C platform is the backbone of a healthy value chain. It transforms the business' operational landscape. It allows to seamlessly prioritize orders as per the customer's credit score card and also ensures timely receiving of customer payments for a sustained cash flow.

## KEY TAKEAWAYS

- 1 Intelligent Automation backed O2C improves the efficiency across all touchpoints
  - 2 It offers automated credit scores of customers and auto-prioritization of orders
  - 3 It ensures sustained cash flows for products and services even during Force Majeures
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# ABOUT THE AUTHOR

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## **NAVIN GUPTA**

Executive Vice President  
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Navin spearheads all quality related endeavours and works towards achieving client satisfaction by ensuring all of Datamatics' deliverables reach its clients with top grade quality.

He is responsible for operational excellence, institutionalizing and building operational rhythm.

Navin has over 26 years of experience in managing operations, software and services delivery, system analysis & design, business analysis, management consultancy, corporate planning, equity research and financial analysis. He has a rich experience of working in both IT Outsourcing and Manufacturing setups. Before joining Datamatics, Navin has worked with several reputed IT organizations, including iGate, Genpact, Birlasoft and Polaris. Navin holds Masters degrees in Economics and Oracle Application and a DBF from ICFAI. He is also trained in TQM and is Six Sigma Certified.

# ABOUT DATAMATICS

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Datamatics provides intelligent solutions for data-driven businesses to increase productivity and enhance the customer experience. With a complete digital approach, Datamatics portfolio spans across Information Technology Services, Business Process Management, Engineering Services and Big Data & Analytics all powered by Artificial Intelligence.

It has established products in Robotic Process Automation, Intelligent Document Processing, Business Intelligence and Automated Fare Collection.

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