

ARTSYL

Intelligent Process Automation

Hydronic and Plumbing Manufacturer Caleffi accelerates sales order processes with docAlpha and SAP

// *Intelligent Capture reduces customer order cycle times by eliminating manual data entry for thousands of line items each month in SAP*

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The Challenge

When the weather in North America turns cold, business heats up for Caleffi, the Milan-based manufacturer of HVAC and plumbing equipment. For the Milwaukee, Wisconsin-based North American office, the heating season often threatens to overwhelm the two-person customer service team—especially when it comes to processing long, complex orders with dozens of line items.

With over 4,200 line items to process in a given month, and business continuing to grow, Caleffi North America Communications Manager Mary Olson was tasked with helping to implement an automated system that would give the customer service team more control and visibility over the process. The goal was to leverage their existing SAP system, but take the pain out of complex order processing so that the team could process orders more quickly, without sacrificing accuracy.

“We wanted to try to do something to help the team out,” Olson said. “The mind set going in was that we wanted to simplify and automate the order process. One, for speed, naturally, and two, for accuracy.”

The Solution

The key to transforming Caleffi’s sales order process was to rely on the docAlpha smart process platform to automate data entry, validate customer and order information and create transactions within their SAP ERP system. This ensured that even the most complex-multi-line orders were processed efficiently, with data tracked and managed within SAP. At the same time, by relying on their Maxim ECM as part of the integration, Caleffi can reliably and efficiently manage customer order data and documents with minimal manual effort.

With docAlpha providing intelligent capture as part of their automated order process, Caleffi cut the time and effort spent entering orders by 66% for multi-line purchase orders.



Client

Caleffi North America, Inc.

www.caleffi.com

Industry

Manufacturing (Heating, Cooling, Plumbing and Process Works Applications)

Needs

- Accelerate processing for sales orders—especially complex, multi-line orders for staff optimization
- Automate order entry data stream with existing SAP ERP system
- Validate sales order data and create SAP transactions

Challenges

- Complex, multi-line sales orders
- Multi-channel order submission (Fax, email, etc.)

Solution

- Artsyl docAlpha

"The docAlpha system is fantastic. When we have orders with 20 or 30 line items, docAlpha processes them and voilà – the software interprets the information automatically. The Customer Service Agent isn't manually entering orders and shifting through different SAP screens," said Olson.

As of 2016, Caleffi was relying on docAlpha to manage their high-volume accounts, automating 35% of the company's orders. In November 2016, for example, docAlpha handled 1,500 line items automatically, eliminating the need for manual data entry or processing.

"One of the things that we wanted was for our Customer Service Team to rethink what they do," said Olson. "For example, docAlpha automatically matches up the billing information, the ship to numbers, etc., so that's all taken care of. It works brilliantly; the customer service agents don't have to worry about it; it's done automatically for them."

The immediate impact of automating the process will lead to a projected expansion of the process to account for more than 80% of orders, with only simple, low-volume orders to be handled manually.

"On the higher-number, line item orders, docAlpha is hands down a winner. There's no question. Orders that would take five to seven minutes to enter were pared down to about two," said Olson.

"The accuracy of docAlpha is really a win for us too," Olson added. "It's different when you're not manually keying in information and you're just doing a visual check. We rely on docAlpha's verification station to make sure that orders are accurate and legitimate. If there's an issue, we get an error message right away and can correct things before the SAP transaction is created."

Artsyl

For over a decade, Artsyl has delivered smart process automation solutions that begin with the most painful and inefficient step in any process — manual data entry. By leveraging data and documents to intelligently handle data capture, extraction, classification and routing, Artsyl streamlines end-to-end operations for improved efficiency, visibility, compliance and control.

Artsyl's docAlpha platform reduces manual document handling, eliminates data entry, increases data accuracy, accelerates workflows and ensures standards compliance. Supported by robust reporting that increases process transparency, Artsyl solutions empower organizations to monitor KPIs, eliminate approval bottlenecks and reduce cycle times while providing instant auditability.

Functionality

- Automated document handling and matching of quotes, orders and invoices
- Automated data entry for customer orders in SAP ERP
- Integration with Maxim ECM to intelligently manage all sales order documents

Results

- 66% improvement in order processing
- Reduced errors and exceptions due to data entry
- 100% liability tracking and process transparency

Benefits

- Faster sales order processing
- Better accuracy
- Greater scalability to manage peak periods

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Caleffi Hydronic Solutions

A leader in the production of components for consumer and industrial heating, air conditioning and plumbing systems for over 50 years, Caleffi employs more than 1,000 professionals throughout Europe, Americas, China, Japan and Australia.

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