

## Retarus Managed Capture Services: Digitize Order Forms and Automate Processing

### The challenge

Wholesaler delivery processes are mostly digitized nowadays — from online order forms to warehouse planning and logistics, right through to billing by means of an ERP system. Communication with suppliers and manufacturers is also usually completely automated using electronic data interchange (EDI). Although digitization has advanced greatly on the wholesaler side, this is not necessarily the case for their customers. Particularly in the ordering process, there is inevitably some unwanted media and integration disruption. Many retailers simply do not have the technical capability and financial means to transmit data in a structured way. As a result, they use template-based paper order forms or unstructured electronic forms. Wholesalers receive these via fax, email or by post.

### The background

Entering orders manually in an ERP system is always time-consuming for employees. Furthermore, this process is extremely prone to errors and automated content checks are seldom carried out. This is not merely bothersome for customers — a bad experience can negatively impact their relationship with suppliers over the long term. The resulting queries and corrections complicate the order process even more, resulting in customer service that is extremely costly.

### The solution

Retarus Managed Capture Services can facilitate the automation of manual order processes to a significant extent. Even forms that are filled out by hand pose no barrier — regardless of whether they are sent by fax or scanned and attached to an email. Retarus Services can integrate these orders efficiently and with transaction security in a company's digital infrastructure.

### Customer benefits

- ✓ Digitization of all order processes
- ✓ Easy integration into the customer's existing infrastructure
- ✓ Seamless integration of all communication channels
- ✓ Connection using standard interfaces
- ✓ Manual processing is kept to a minimum

## Benefits at a glance



Operated in Retarus data centers in compliance with the strictest data protection regulations



Customized and scalable bandwidth with high availability



Transparent reports



Comprehensive archiving options



Personal support

## Use Case

To receive orders by fax, Retarus can either assign a new fax number or use an existing connection and forward to the cloud infrastructure. Once the Retarus data center receives the order, a powerful automatic text recognition reader (OCR engine) reads the form, capturing not only the plain text, but also the layout of the form and other elements of the document. Thanks to the wholesaler's catalog data and master data, which is stored in the system and continuously synchronized through EDI, order information can be checked for content and assigned. Retarus then forwards all of the validated data in the required format together with the original document to the ERP system. Retarus Cloud Services support all common interfaces and file formats. Even native PDF documents or orders that are scanned and transmitted as email attachments are processed by the Retarus Services.

If certain details on an order cannot be read by the OCR because the handwriting is illegible, the corresponding EDI documents are flagged as blocked, which instantly makes it visible in the ERP system that manual processing is necessary. At the same time, the responsible customer service employee is forwarded the original order form in which all unreadable text and areas requiring verification are clearly marked. This makes manual post-processing much more efficient for customer service agents, as only erroneous information needs to be rechecked. With the help of Retarus Managed Capture Services, this type of digitization allows companies to accelerate the entire order process, improve reliability and substantially lower costs by reducing staff effort.



## Did you know?

*The Retarus Enterprise Administration Services Portal (EAS) provides you with all the information you need about the status, quality, and scope of incoming documents, helping you keep an eye on every single document.*

## Other scenarios

### Integrating barcodes

With Retarus Cloud Fax Services, wholesalers can also add recipient-specific barcodes to their order forms. Combined with an OCR engine, this serves as an additional way to fully automate the assignment of documents.

### Long-term archiving

Legal and industry-specific regulations require companies to archive their correspondence for many years. Retarus Cloud Fax Services make it possible to archive all incoming original documents as PDF files over the long term.

### Faxing in All-IP environments

Retarus Cloud Fax Services enable you to send and receive faxes reliably, even in the digital All-IP environment. Companies can continue to reliably send faxes with their existing mail clients and business applications, without the need for additional software or hardware.