

Customer Order Management

- Optura Customer Order Management is a prepackaged composite application that works within existing ERP systems to streamline and automate creating, managing, and coordinating customer orders and related customer order information. Customer Order Management provides centralized visibility into the process of generating, tracking and managing orders across departments and between companies. Optura Customer Order Management allows companies to efficiently monitor overall order status, anticipate disruptions, evaluate performance and establish order workflows. Implementing Customer Order Management optimizes the customer order lifecycle and enables companies to be more attuned to customer needs.

BACKGROUND

Orders are the lifeblood of most companies. It is therefore critical that the process of receiving, managing and fulfilling orders be efficient, accurate and secure. For some organizations, the process of receiving orders is simple with a one step process and delivery against a single product line. Today's enterprise companies however, are facing increasingly complex ordering processes with orders consisting of component parts, customized configuration, make-to-order systems and the inclusion of services. Orders may include content or digital assets and can require products and services from subcontractors or multiple partners. In addition, products and services may be delivered through a distribution channel (multi-tier) adding an additional layer of complexity to the process of determining and fulfilling customer requirements.

The management of customer orders can directly affect multiple business operations including production capacity, manufacturing, inventory management and warehousing and indirectly affect other departments such as customer support and finance. Problems in any of these areas can in turn affect the profitability or viability of a company.

Optura Customer Order Management provides a comprehensive solution that virtually consolidates order information for central aggregation and management while providing for decentralized input and distributed visibility. Customer Order Management integrates with existing ERP systems to consolidate order information from sales, marketing, credit, finance, tax, customer service and approval information for streamlined access and use. All auxiliary, subsidiary and ancillary information that affects customer orders can be exposed for visibility and modification.

PRODUCT OVERVIEW

Optura Customer Order Management provides secure order entry, consolidated customer pricing, sold-to/ship-to/bill-to information, order status and order history. Information is pulled from and supplied to existing ERP systems and available for access and manipulation using workflow methods and applied business rules and policies. Optura Customer Order Management is a composite application that simplifies and streamlines the process of order management through the complete order lifecycle. Order information is virtually centralized for management but logically decentralized for access and modification by different departments and by customers for self-service.



Figure: Optura Customer Order Management enables customer self-service as well as visibility into the entire order process.

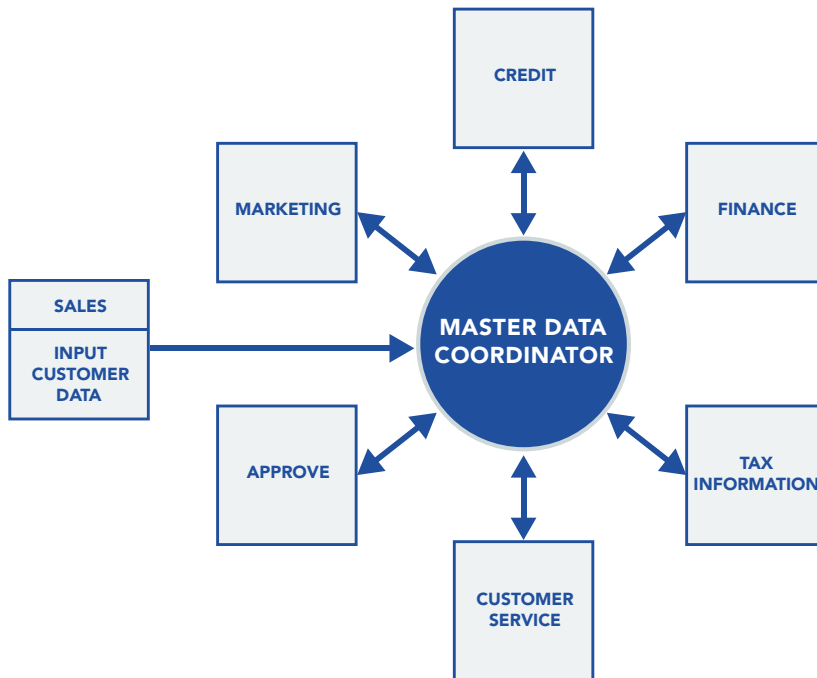
Optura Customer Order Management features include the following:

- **Customer Profile Management**— Aggregate and normalize all information about an order and the customer including Sold-to, Ship-to, Bill-to and customer profile information.
- **Customer Self-Service**— Provide customers with self-service views and access to order information including order entry, profile content, self-registration and order and delivery status. From a single view, customers can see order information, pricing, contract terms and historical information.
- **Order Workflow**— Orders become part of workflow with process paths based on business rules and policies. Routings are automatic and include approvals, where required, based on roles and responsibilities.
- **Visibility**— Both internal and external stakeholders are provided levels of visibility into the routing and status of customer orders. Bottlenecks and cycle times are surfaced and reports are generated indicating performance and throughput.
- **Exception Handling**— Orders requiring special consideration can be automatically escalated with routing and approval for timely fulfillment.
- **Centralized Control**— All information from dissimilar systems relating to and affecting a customer order can be aggregated for coordination. Synchronization can take place between customer service, supply chain management, tax, approval, marketing, credit, finance, sales and production systems.
- **Dashboard Access**— The Customer Order Management user interface is graphical, intuitive and provides a dashboard view of customer order status and information. Category tabs and drill down methods provide easy and fast access to all relevant data.
- **Rapid Deployment**— Optura's prepackaged solutions using standards-based Web services, application servers, and Java connectors are easily deployed and rapidly integrated.
- **Streamlined Communication**— Interaction and communication can span departments and multiple enterprises. Orders can be processed through multiple constituents with visibility and status still maintained.

- **Industry Diverse Application**— Customer Order Management can be applied across a diversity of industries applying to catalogs, make-to-order, service provisioning, digital assets distribution, content aggregation and more.
- **Legacy System Integration**— Optura integrates with existing legacy systems, preserving investment in enterprise resource planning, supply chain management, and customer resource management applications.

HOW OPTURA CUSTOMER ORDER MANAGEMENT WORKS

Optura Customer Order Management provides a high-level process flow for the setup, creation, review and monitoring of customer orders. It works in conjunction with standard ERP systems and provides best-practice processes for order entry, order specifications, work order instructions and item information.



THE TECHNOLOGY

Optura Customer Order Management works in conjunction with existing ERP systems such as SAP to improve workflow and collaborate inside and outside the application. Application logic resides both inside the ERP system and external to the ERP system in a middleware layer based on J2EE application standards. As a composite application, Optura Customer Order Management interacts with legacy applications, providing input and acting as a user agent.

Key components of the Optura Customer Order Management solution reside on an application server, using connectors and J2EE portal technology. Optura pre-packaged solutions work with all major application server products such as IBM WebSphere and SAP NetWeaver. Optura's expertise is in performance tuning the integration point with the legacy system using the Optura Transaction Control Engine™ (OTCE) and ERP specific connectors. The OTCE combined with Optura's messaging, portlet adapters, and Web services provides a powerful and flexible platform for state-of-the-art composite applications.

With Optura SAP solutions, a pre-packaged application lives inside SAP and utilizes the existing SAP Workflow/WebFlow engine. The solution uses SAP code and has been developed using native SAP technology—namely tools in the ABAP Workbench such as dialog programs, function groups, business objects, workflow definitions, roles, customizing tables, reports, etc. Optura SAP composite applications do not include any modifications to SAP core code and all code associated with these solutions exists in a separate namespace (beyond SAP 4.0B) or as a “Z” prefix (for SAP 4.0B). Some applications utilize standard SAP user-exits and, in these cases, the ABAP code required for the user-exit is not included in the transports, but is inserted manually and documented separately.

BENEFITS

Implementing Optura Customer Order Management provides multiple advantages for enterprise companies and their customers. Key benefit areas are enhanced levels of customer service and lower costs with the ability to experience a rapid return on investment. Other advantages include:

- **Effective Control**— Optura Customer Order Management provides the ability to effectively unify all facets of customer order information for better control. Content includes integrated data about the customer, order specifications, item information, availability and specific instructions.
- **Better Accuracy**— Better control leads to more accurate billing and shipping data in ERP systems which provides consistency of information throughout the organization.
- **Better Customer Service**— Customer advantages include faster orders and more direct attention from suppliers. Integration helps suppliers understand customer needs for profitability, procurement, and efficient processes to remove delivery risks.
- **Rapid ROI**— Companies implementing Optura Customer Order Management can experience a rapid return on investment with immediate financial gain through lower manpower costs, new customers, fewer returns and exchanges, and lower inventory and production costs.
- **Optimized Order Lifecycle**—Shorten cycle times, speed delivery, and automate routing and approval tasks. Companies are able to deliver more orders, more efficiently and with less effort.
- **Increased Productivity**— Automated processes reduce manpower requirements for repetitive tasks and eliminate manual re-keying and re-work. Headcount can be refocused on activities that are business positive while research, problem querying, and manual routing are eliminated.
- **Streamlined Communication**— Organizations benefit from better interdepartmental communication and in turn are more efficient and effective with coordination, production, fabrication, construction, and costing. Optura Customer Order Management streamlines and simplifies workflow for more effective communication and consistent processes spanning across multiple organizations.

LEARN HOW TO ...

Optura Customer Order Management is a prepackaged composite application that installs quickly and integrates flawlessly with SAP and other ERP systems. Businesses that implement Customer Order Management can streamline the process of creating, tracking, modifying and integrating orders across multiple departments and processes while experiencing a rapid return on investment. Learn how to simplify your customer order management today by calling Optura at **480.488.3040** or visit www.optura.net.

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