

PRODUCT OVERVIEW

# OpenText™ Active Orders

Establish and maintain end-to-end supply chain transaction visibility through automation, partner enablement and actionable insights



## Improved productivity

by reducing paper transactions



## Reduce operating costs

by up to 40 percent



## Reduce receiving time

by up to 75 percent and receiving errors by up to 80 percent



## Capture early payment discounts

**Increasing supply chain visibility and automation is critical for enterprises seeking to reduce costs and improve operational performance. A key step is implementing a solution that provides insight and control for transaction data from procurement to payment, through orders and order status, logistics and transport activities and invoices with payment status. Both digital and non-digitally enabled trading partners should be able to access it.**

Companies that succeed in automating and optimizing procure-to-pay processes with a high percentage of suppliers achieve higher profits, discounts for faster payments, higher inventory turns, expedited deliveries, significant cost reductions and happier customers and suppliers.

### OpenText™ Active Orders

Active Orders is a cloud-based solution for buying organizations providing comprehensive technology and services for end-to-end transaction automation and visibility. Organizations can achieve complete transaction management and 360-degree supply chain visibility for all suppliers—including those who are not digitally enabled.

A component of the OpenText™ B2B Managed Services portfolio, Active Orders supports traditional order management, shipping, receiving, invoicing and payment processes for all transactions.

A simple, intuitive web portal provides access for non-electronic trading partners, enabling digital transactions for everyone.

## Unmatched B2B experience and global support

- More than 40 years of proven experience
- Driving 19 of Gartner's Top 25<sup>1</sup> Supply Chains
- Highly available cloud-based, global infrastructure
- 35,000+ B2B managed services customers around the world
- 24x7x365 global support
- Direct operations in 20 countries, active customers in 60+ countries
- Pre-existing connections to 1.1 million trading partners
- 33billion+ transactions annually



## End to end transaction management and visibility

### Order planning and execution

Active Orders provides visibility through each step in the order lifecycle.

- **Order tracking and history:** Establish a realtime view into purchase orders and associated changes. All orders generated by the buyer's ERP application can be communicated to suppliers via a format of the buyer's choosing.

Businesses using Active Orders have been able to improve buyer and supplier productivity by up to 25 percent by removing paper from communications and minimizing the use of costly, error-prone manual interactions. Automation frees up time for more strategic activities, such as negotiating price and terms, undertaking spend analysis and supplier selection.

- **Order response and commitments:** Upon reviewing details, suppliers can accept, reject or propose changes through comprehensive order acknowledgement capabilities. Buyers can configure Active Orders for suppliers to acknowledge the entire order or individual line items. With order acknowledgements, suppliers can also provide detailed ship schedules and quantity commitments.
- **Purchase order changes:** Active Orders automates delivery of updates and maintains a history of revisions down to the line level. By tracking PO changes electronically, buyers and suppliers can significantly reduce exceptions in the order fulfillment process.
- **Email notification:** Suppliers can receive automated email alerts when a new or changed order arrives. Auto notification enables fulfillment, customer service and sales users to identify changes to order contents, quantities and delivery dates that the supplier might not be able to achieve.

### Shipping and receiving/logistics

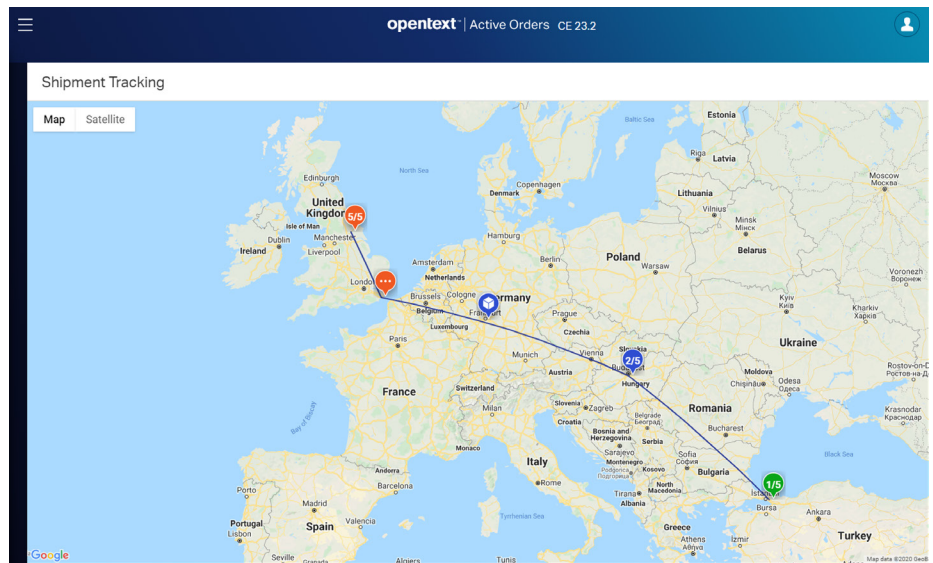
Active Orders can significantly improve supply chain efficiency by automating warehouse receiving and digitizing documentation flows. According to OpenText customer use cases, using Active Orders with Advance Shipment Notifications and barcode labels has been shown to reduce receiving time by up to 75 percent and receiving errors by up to 80 percent.

- **Advance Shipment Notification (ASN) creation:** Suppliers can generate ASNs specifying the details of the contents, arrival date and transportation carrier for an upcoming delivery. ASN fields can be pre-populated from the original purchase order via a "turnaround," reducing the likelihood of data errors.

<sup>1</sup> Gartner, Gartner Supply Chain Top 25 for 2022. (2022)

GARTNER is a registered trademark and service mark of Gartner, Inc. and/or its affiliates in the U.S. and internationally and is used herein with permission. All rights reserved.

- **Data quality:** In addition to data quality provided via streamlined business processes, more than 250 document-level business rules can be configured to match buyer-specific business processing—further enhancing data accuracy. Buyers can create document-level rules, such as tolerances or ability to require specific data elements. Rules can also be set at the community level with the ability to override them for specific suppliers.
- **Warehouse Management System (WMS) integration:** Ship notices can be directly transmitted into the buyer’s WMS to facilitate receiving.
- **Barcode labeling:** Active Orders enables suppliers to create and print barcode labels to be affixed to physical shipment containers. When a shipment arrives at a warehouse, the barcode label can be matched against the corresponding ASN in the WMS to facilitate rapid check-in.
- **Goods Receipt:** The buyer can send electronic goods receipts to suppliers. This proof of delivery can be used as a trigger for billing or a closed loop signal to track shipment status.
- **Logistics track and trace:** Carriers and logistics providers can provide shipment status updates via EDI, API or the web portal. Logistics reports against shipments provide realtime visibility into where each order or shipment is with estimated time of arrival (ETA) and may be viewed in Google Maps™. Staff can be alerted of late shipments with updates to ETA based on actual activity dates and times.



Gain end-to-end shipment visibility

Businesses also benefit from improved inventory management. With Active Orders, buyers and suppliers have visibility into inventory in transit and on order, as well as expected arrival timeframes. When there is an urgent need for materials, parts or finished product, buyers can confidently assess whether the inbound inventory will arrive on time or whether an expedited shipment is necessary. This helps buyers and suppliers optimize their use of safety stock and benefit from lowered transportation costs through decreased reliance on expedited freight.

### Invoicing and payments

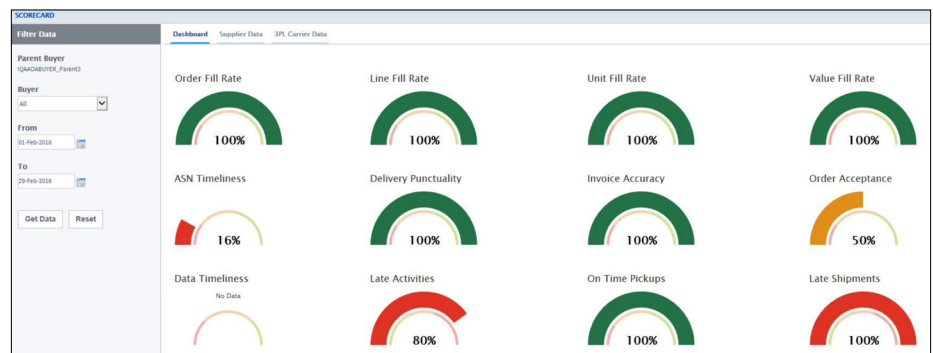
Active Orders allows non-digital suppliers to generate accurate invoices, as well as view the payment status of issued invoices.

- **Increased accounts payable productivity:** Suppliers can view the status of outstanding invoices through the self-service web portal, reducing the volume of phone calls to accounts payable centers and increasing staff productivity.
- **Faster approvals:** Electronic invoicing can automate much of invoice capture, validation and matching. Reducing the time required for approval also reduces the risk of delayed payments that damage relationships.
- **Capture early payment discounts:** Through automation, invoices can be approved within two to three days after receipt. This enables buyers to negotiate trade discounts with suppliers for early payment.
- **Access to remittance information:** Active Orders displays remittance advice from buyers to suppliers, identifying the payment settlement date, as well as the payment amount. Additionally, buyers can provide remittance details, including originating bank ID, receiving bank ID and any applicable invoice adjustment information. Using remittance advice, suppliers' accounts receivable groups can easily identify which payments are related to which invoices and identify any discounts taken.
- **Data quality:** Active Orders can eliminate a significant percentage of manual work spent validating and matching invoices by performing configurable data quality checks and thresholds before documents are delivered to the buyer's systems.
- **Integration with OpenText™ Active Invoices with Compliance:** This integration improves compliance with electronic invoice tax regulations, including validating data for tax requirements, government reporting, digital signature and archiving and storage.

### Measure and analyze supplier and carrier performance

Dashboards provide a visual summary of supplier performance against performance indicators, such as order acceptance, invoice accuracy, delivery punctuality and ASN timeliness. These analytics can be viewed at a supplier summary level as well as for an individual supplier with drill down into a selected supplier's data for further analysis and problem determination.

Use this information to collaborate with suppliers to improve delivery or invoice processes, negotiate terms for new contracts and alleviate risks created by poor performance. Available when using Logistics Track and Trace features, carrier performance indicators include data timeliness, on-time pick-ups and late deliveries.



Supply chain metrics provide insight into possible issues with partner performance

[Product page](#)

[Explainer video](#)

[Click tour](#)

[Position paper: 5 tech trends shaping P2P](#)

## Support specialized business processes

Some best practice supply chain processes automated by Active Orders include:

### Cross-docking

The majority of goods received into warehouses/distribution centers do not stay there very long. Shipments are to be forwarded to another location, such as a nearby manufacturing plant, a retail store or a customer location. In a cross-docking scenario, goods are immediately moved from the receiving dock to the outbound dock. Informed by an ASN and barcode as to what has arrived and where, the warehouse management system can now route cartons internally through automated conveyor systems for cross-docking.

### Direct Store Delivery (DSD)

DSD enables a retailer to order goods for delivery directly to its stores, bypassing the retailer's distribution centers, shortening delivery time and helping ensure there is stock on hand to meet consumer demand.

### Evaluated Receipt Settlement (ERS)

ERS (also called self-billing) allows goods to be purchased and paid for without exchanging an invoice. Upon receipt of goods ordered, the buyer confirms the shipment accuracy (i.e., right products, correct quantities) and sends payment to the supplier based on the pricing in the purchase order. Because invoice processing is eliminated, the procure-to-pay process is greatly streamlined.

### Customized processes

Additional processes, such as distribution center bulk pack, mark-for-end-location shipments, drop ship and end consumer delivery can be custom configured in Active Orders.

## About OpenText

OpenText, The Information Company, enables organizations to gain insight through market leading information management solutions, on-premises or in the cloud. For more information about OpenText (NASDAQ: OTEX, TSX: OTEX) visit: [opentext.com](https://www.opentext.com).

## Connect with us:

- [OpenText CEO Mark Barrenechea's blog](#)
- [Twitter](#) | [LinkedIn](#)