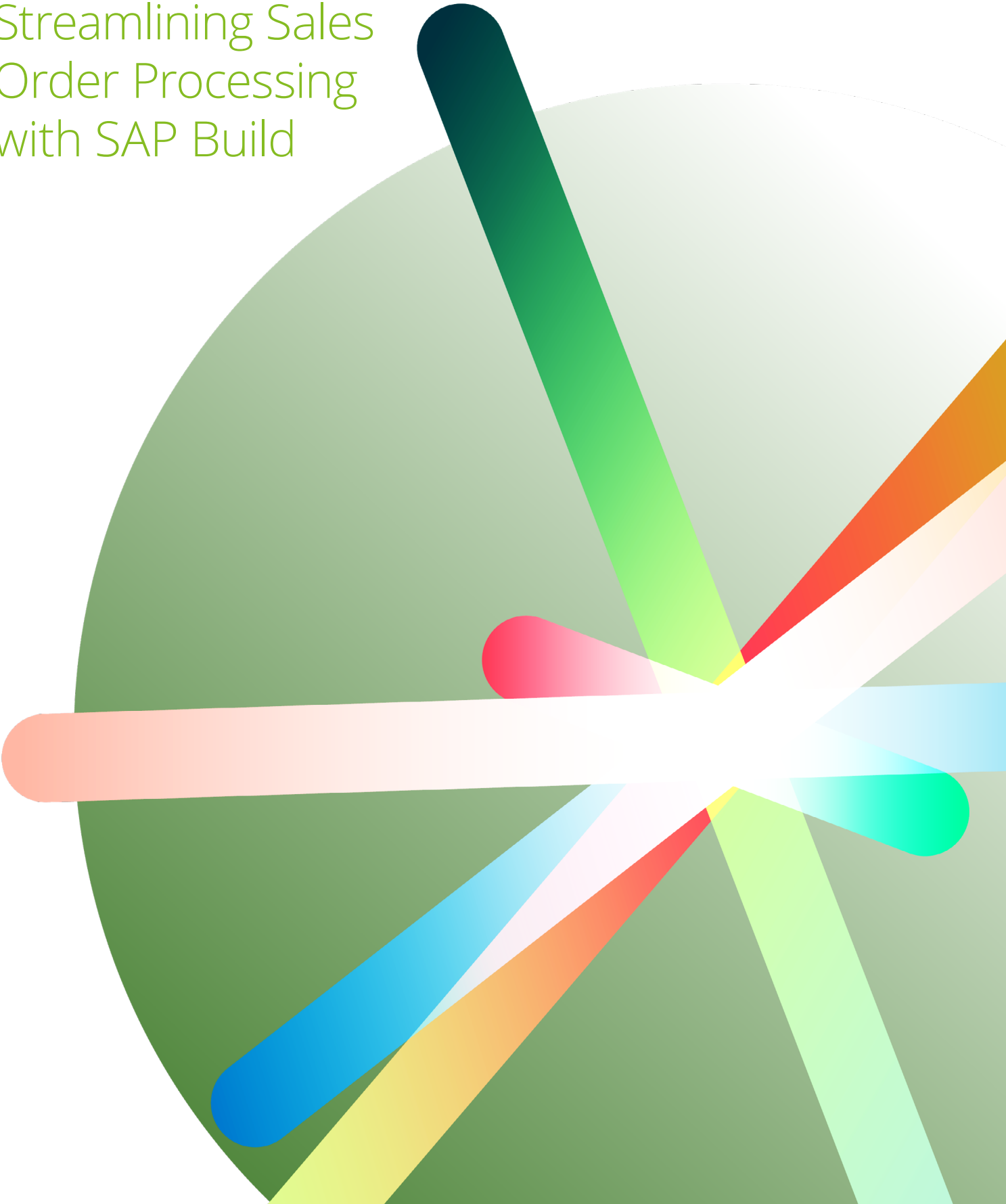# Deloitte.

Streamlining Sales Order Processing with SAP Build

Streamlining Sales:
How Summer Workloads Sparked an Automation Revolution

The weekly team meeting had a different energy this time. With summer holidays in full swing, the sales team gathered around the table—a leaner group than usual. Coffee cups in hand, they exchanged updates and shared light-hearted anecdotes about covering for vacationing colleagues. But as the discussion shifted to workloads, the mood turned serious.

"We're drowning in manual sales order entries," one team member blurted out, prompting nods and murmurs of agreement. Piles of unprocessed orders were eating into their already stretched schedules, and the ripple effect was clear: delayed responses, errors creeping into orders, and frustrated customers.

That was when the sales manager leaned forward, visibly concerned. "We can't afford to let this impact our customers. Every delay chips away at their trust and satisfaction," they said firmly. The team fell silent for a moment, the weight of their shared challenge sinking in.

Then someone ventured a suggestion: "What if we automated parts of the order process? We could eliminate some of the bottlenecks and free up time for more important tasks."

What started as a casual remark quickly became the spark for a larger conversation about efficiency, innovation, and how robotic process automation (RPA) could transform their day-to-day work.

In this blog, we'll dive into how moments of strain—like summer staffing challenges—can highlight inefficiencies and open the door to smarter, automated solutions. For this sales team, it was a game-changing realization. Could it be the same for yours?

Embracing RPA for Efficiency

In today's fast-paced business environment, AI and RPA are game-changing solutions for these efficiency challenges. By automating repetitive tasks, sales teams can focus more on what truly matters. SAP Buildoffer features in this area, and this blog will explore how process automation using this tool can transform sales order processing.

What is SAP Build?

Before diving into specifics, let's introduce SAP Build. It is a powerful tool that helps automate and simplify complex processes. With SAP Build, sales teams can easily handle tasks that used to take up a lot of time and effort. SAP Build is a tool that helps users create apps, automate processes, and design business sites without needing to write code. It allows businesses to quickly develop and adapt solutions, making it easier to respond to changing needs.
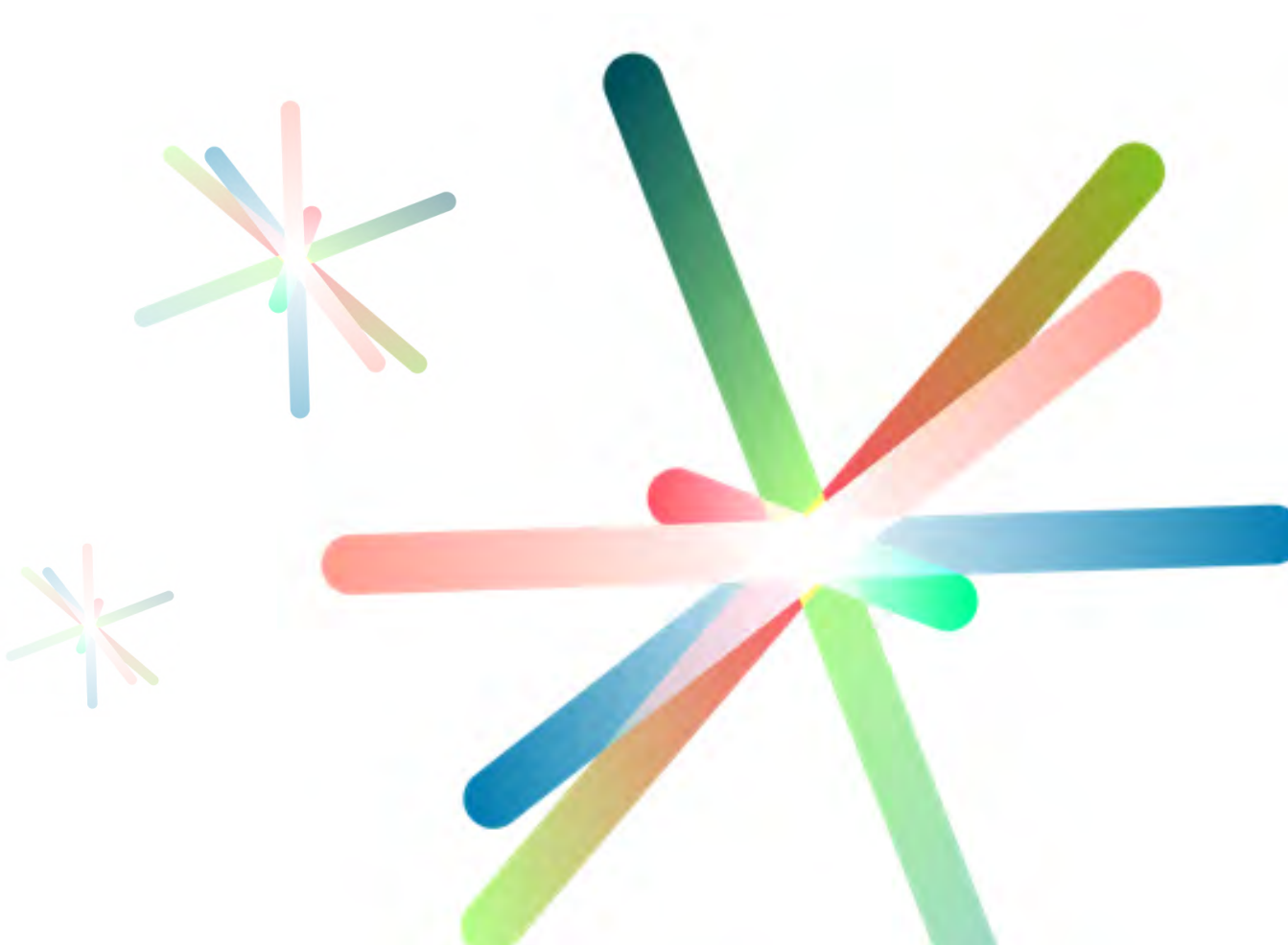
Combining RPA with AI

We use SAP Build Process Automation (part of SAP Build) to streamline key parts of the workflow. For example, consider the process of handling customer orders via email. With SAP Build Process Automation, the system can automatically extract information from emails and their attachments, even when the data is unstructured. This means that details like customer names, addresses, order numbers, and product details can be identified without the need for manual input. Following the extraction, the next crucial step is the transformation of this unstructured information into a structured format that can approved by the customer service and be posted into S/4HANA.

We have simplified this process in the diagram below:
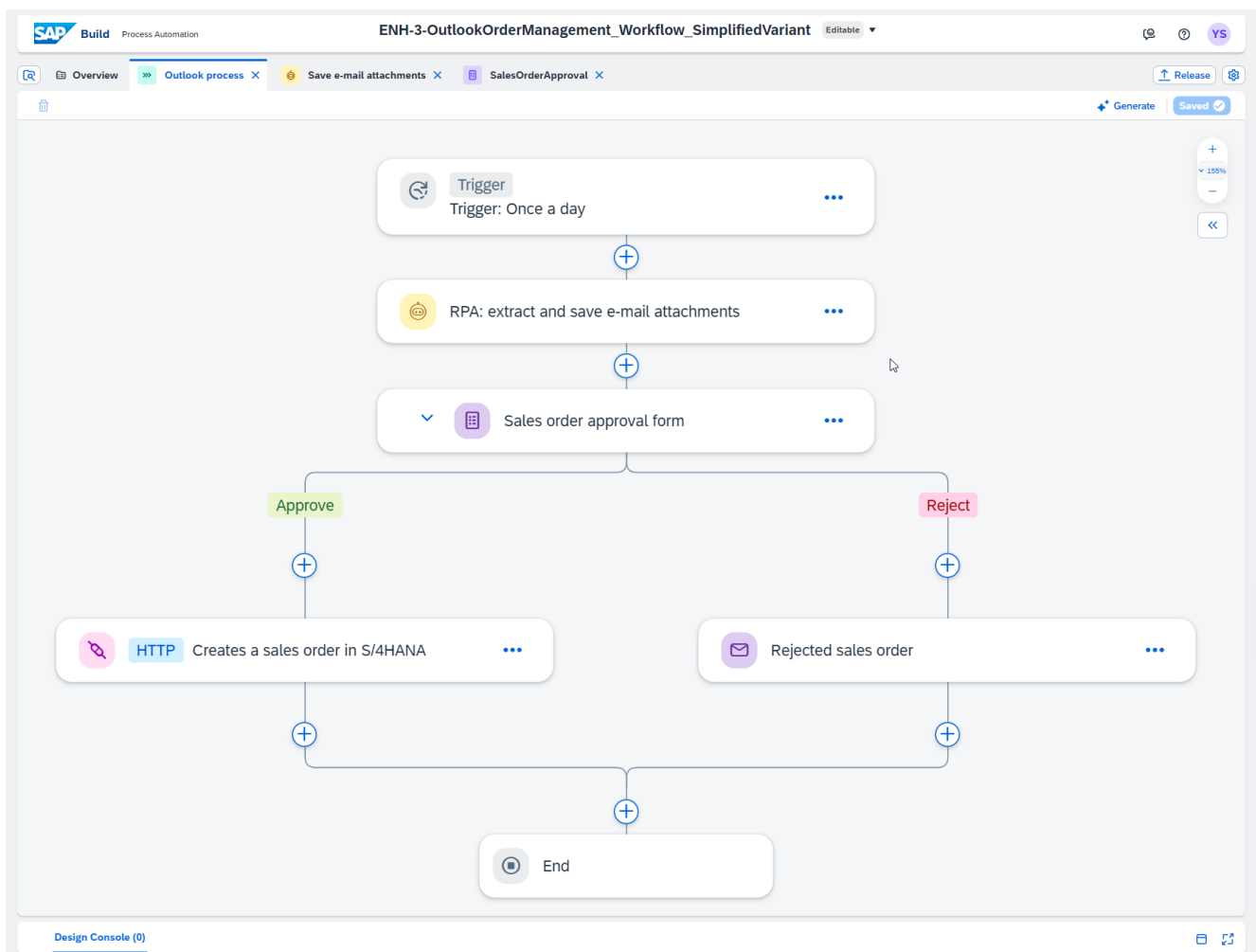
Image 1. Simplified flow of what the Process Automation looks like

1 Start Outlook Process:

You can set a predefined trigger for a specific workflow.

2 RPA: extract and save e-mail attachments:

The RPA bot scans emails for orders based on predefined criteria and saves the attachments.

3 Upload Files to document information extraction:

The RPA bot uploads the saved attachment from the email to the document information extraction application. This helps to extract the business document into header and line items.

4 Sales order approval form:

the extracted information from the documents are visible within the approval form. The customer service can still change the order based on the actual order from the client. If the sales order is approved, the order will be created in S/4HANA. If the sales order form is rejected, an email is shared

Image 2. Example of the file preview where SAP AI has mapped data from the attachment to the sales order fields

Potential of Combining RPA with SAP's New AI Features

The demo explained is just an example of combining RPA and AI in the sales line of business. In addition, a similar use case can be made for return requests from customers either directly or via suppliers. This often happens via emails or forms. In this case the manual work of copying this over in SAP can be automated by extracting the data, having it mapped to the correct return request fields and pass it through a custom workflow for approval in S/4HANA. In other lines of business, similar manual tasks could be automated. For instance, in finance, RPA and AI can automate invoice processing by extracting data from invoices received via email and capturing these in S/4HANA.

This approach not only enhances efficiency but also allows employees to focus on less repetitive and mundane tasks. As AI advances, opportunities to automate repetitive tasks will expand across various departments, driving overall productivity.

Above described case and other mentioned examples are fitting processes to start exploring the RPA and AI journey as they require minimal effort to implement, but can have a net positive impact on time spent on repetitive and mundane tasks by employees. It also can be the first step to building confidence on what these solutions can bring to your company.

Summing up the main benefits and points of caution to take into account when implementing these solutions:

Benefits

Using RPA and AI offers several benefits within the market-to-cash area:

Faster Processes: By automating order processing, the system handles sales orders much quicker than manual entry, meaning orders are completed faster and more efficiently.

- In the market-to cash area, automating tasks like order processing, invoicing and payment tracking speeds up the entire workflow, eventually allowing companies to handle more transactions.
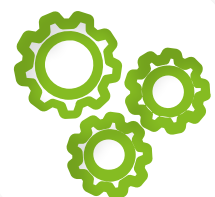
Fewer Errors: Automation helps reduce mistakes in entering order details, leading to more accurate sales orders and fewer issues for the sales team.

- In a broader context, automation minimizes errors that can occur with manual entry, such as incorrect data or missing information, leading to improved accuracy.

Better Customer Service: Customers receive timely updates about their orders and payments, keeping them informed and improving their overall experience.

- Automation enables real-time updates about order and payments, ensuring customers are always informed.

Cautions

The use of RPA and AI also comes with a bit of caution, the following points should also be taken into account.

RPA flow maintenance: the RPA flow is in essence a computer program mimicking a human user. It is not taking any shortcuts. If the process changes slightly, the model needs to be adapted

RPA requires locally installed agent: to pull the information from an email box, the RPA agent needs to run on a local computer/virtual machine. This could run on the business users machine, but would suit best on an independent machine for optimal uptime

AI can still make mistakes: PDFs with a clear structure can be easily recognized by AI, sometimes if this entails handwriting or other less recognizable information the system could incorrectly map or not understand information, it is getting better with time

In Summary

By using the RPA tools in SAP Build Process Automation, companies can significantly improve their sales order processing. This makes operations more efficient and ready to meet market demands effectively. From Deloitte's perspective, we see the net benefit of implementing these solutions as it relieves manual tasks from employees and they can focus more time with or for the customer. Do keep in mind the mostly technical cautions as if these are not fully understood it could cause misunderstanding or decline of the solution by the users

Want to know more?

Please get in touch with us via below contact information.

Authors

Yves Suijker

ysuijker@deloitte.nl

+31882860104

Dennis van Klaveren

dvanklaveren@deloitte.nl

+31882880753

Deloitte.