EXAMPLE BRIEF

# Customer purchase orders rekeyed into the ERP by hand

> When a customer purchase order lands in the shared orders inbox, the inside sales team wants it in the ERP as a correct sales order within the hour, without anyone retyping it, so that orders ship the same day and the reps spend their time selling.

TODAY

Three inside sales reps key about 1,200 orders a week into the ERP by hand, around 6 minutes each. Keying errors send out two or three second delivery trucks a week.

| VALUE A YEAR | TIME TO PUT IN PLACE | PAYS BACK IN |
|---|---|---|
| **$138K–$195K** | **4–6 weeks** | **2–5 months** |
| 3,100–4,350 hours back | Build $30K–$50K · $2K/month | First-year net $64K to $141K |

How we got there: 1,200 orders a week × 6 min × 52 weeks, 50–70% back, at $40 an hour, plus fewer re-deliveries

THE APPROACH THESE NUMBERS ARE FOR

## Orders drafted into the ERP for a rep to approve

An agent reads each order from the inbox, matches the lines to item codes and creates a draft sales order. The account's rep approves or corrects it; nobody retypes.

Done before. We have built agents that read high-volume email and PDF requests for freight and logistics, and that produce rule-based documents for review in professional training.

WHAT WE ASSUMED

- 6 minutes an order is an estimate, not timed
- Handwritten orders still take a rep longer to check
- Re-deliveries fall by three quarters, not to zero

HAVE READY FOR A FIRST CONVERSATION

- Whether the ERP's sales-order import takes every field
- A week's count of orders that arrive as photos
- Who will keep the list of contractors' names for items

Estimates only. The value is built from the figures in this conversation and the assumptions above; the time and cost are a planning range from what CollectiveXP has built before. Not a quote or a commitment: a fixed price follows a scoping call.

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