Kordelli

ILLUSTRATION · SYNTHETIC DATA
Not a client result

Order intake: a sample workflow

How an emailed PO or an accepted quote becomes a validated ERP order, with a person deciding only the exceptions.

1 · THE FLOW

Order arrives — Email with PDF, spreadsheet or accepted quote → **Capture** — Tools you already have, e.g. Power Automate + Excel → **Validate** — Your rules: customer, SKU, price, duplicates → **ERP sales order** — Created through a supported interface, logged

If a rule fails ↘

Review queue — A person sees the reason and decides. The order then continues to the ERP.

2 · EXAMPLE: PO 45822 (SYNTHETIC)

Line	Item	Qty	PO price	List price	Check
1	HX-1180 · Hex bolt 1/2"	400	2.35	2.35	OK
2	HX-2210 · Hex bolt 5/8"	250	4.10	3.85	**Price differs → review**
3	NT-0910 · Lock nut 1/2"	400	0.62	0.62	OK

Customer found · all SKUs valid · not a duplicate PO · one price exception. Customer service chose the list price, and the order was created as SO-10483.

3 · TYPICAL VALIDATION RULES

- Customer and ship-to address exist and are active
- Every SKU exists and is not discontinued
- Price matches the price list or contract, within a tolerance you set
- Quantity respects pack size and minimums
- PO number not already entered (no duplicates)
- Accepted quote: PO lines match the quote

4 · WHAT STAYS WITH A PERSON

- Price or quantity differences
- New customers and new ship-to addresses
- Substitutions and backorders
- Credit holds and special terms
- Anything the rules can't read with confidence

AI is added only where rules can't read a format reliably, because it usually adds a monthly cost.

START HERE · ORDER ENTRY DIAGNOSTIC

We map how orders reach your ERP today, measure orders per day, minutes per order and the exceptions, then tell you whether automating is worth it. You keep the map, the measurements and the business case.

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