Whitepaper

DELIVERY NOTES+ (DN+)

Automatic archiving of delivery notes for SAP orders

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1 Overview (Executive Summary)

Delivery notes are still predominantly delivered in paper form along with the goods. Archiving these delivery notes requires manual work and storage space in folders.

When a delivery note needs to be viewed, the clerk must go to its storage location, retrieve the paper copy, and then, after using the required information, put it back in the folder.

Even when the delivery note is scanned directly or transmitted electronically, the email or attachment must be stored in a way that allows for easy retrieval.

DELIVERY NOTES+ eliminates this manual work and provides direct access to the delivery note via the attachment list of the SAP purchase order.

Advantages of DELIVERY NOTES+

- Significant time savings through largely automated processing of delivery notes.
- No one-time fees – savings from day one.
- Automatic filing of the delivery note as an attachment to the corresponding purchase order.
- Legally compliant long-term archiving through storage in PDF/A-3 format.
- Operator intervention is only required in the case of incorrect information on the delivery note or OCR errors.
- Automatic verification of the order number, supplier, and ordered items, thus largely eliminating the possibility of incorrect order assignment.
- Simple and intuitive program – no training required.

2 Introduction

A delivery note is an important document for describing and documenting a completed delivery of goods. It contains the quantities delivered and a description of the items. The delivery note allows verification of whether the delivery matches the order or if the received goods differ from the order.

In Germany, delivery notes must be archived for a specific period. If the delivery note also serves as an invoice, a retention period of eight years applies. Delivery notes that are independent documents and not accounting records must be retained for at least the current calendar year. In practice, however, a longer retention period of several years has become established, partly because a six-year period was legally mandated until the end of 2024.

3 Problem statement

There is no legally binding format for delivery notes. Each supplier can design their delivery note differently. Delivery notes still predominantly arrive at a company in paper form along with the goods. Digital delivery notes also exist, arriving as email attachments – usually in PDF format. Archiving these delivery notes always requires manual work and, in the case of paper delivery notes, also storage space in folders.

If a delivery note needs to be reviewed after a delivery, the clerk must go to its storage location, retrieve the paper copy, and, after using the required information, file it back in the folder. Even if the delivery note is scanned directly or transmitted electronically, the email or attachment must be stored in a way that allows for easy retrieval.

In any case, processing delivery notes involves numerous small, manual, and error-prone steps.

4   Solution: DELIVERY NOTES+

The software add-on DELIVERY NOTES+ eliminates this manual work and provides direct access to the delivery note via the attachment list of the SAP order. The software automates all work steps from the receipt of the delivery note to its legally compliant archiving in a company's ERP system.

4.1   Receipt of delivery notes

DELIVERY NOTES+ supports various ways in which delivery notes are received within the company:

4.1.1   Delivery notes in paper form

The delivery note is scanned upon handover of the goods or at receipt and digitized as a PDF file with text layering. This copy is then saved to a server share. If a delivery note is received digitally via email, DN+ saves it in the corresponding folder.

The scanner must be able to scan incoming delivery notes in the correct format to avoid paper jams.

The scanner software must be configured to save the contents of the delivery note as a searchable PDF file. If the scanner does not support OCR, DN+ will perform the OCR processing automatically.

4.1.2   Delivery notes as an attachment to an E-Mail

For delivery notes received by email, a central mailbox is set up, and suppliers are notified of it. They can send delivery notes to this mailbox, but no other content.

DELIVERY NOTES+ automatically detaches the attachment and saves the file in the same folder where the scanned delivery notes are stored.

4.1.3   Delivery notes in digital form in a personal mailbox

If delivery notes are sent directly to an employee's personal email inbox, the employee forwards the email to the inbox monitored by DN+. Further processing then occurs automatically.
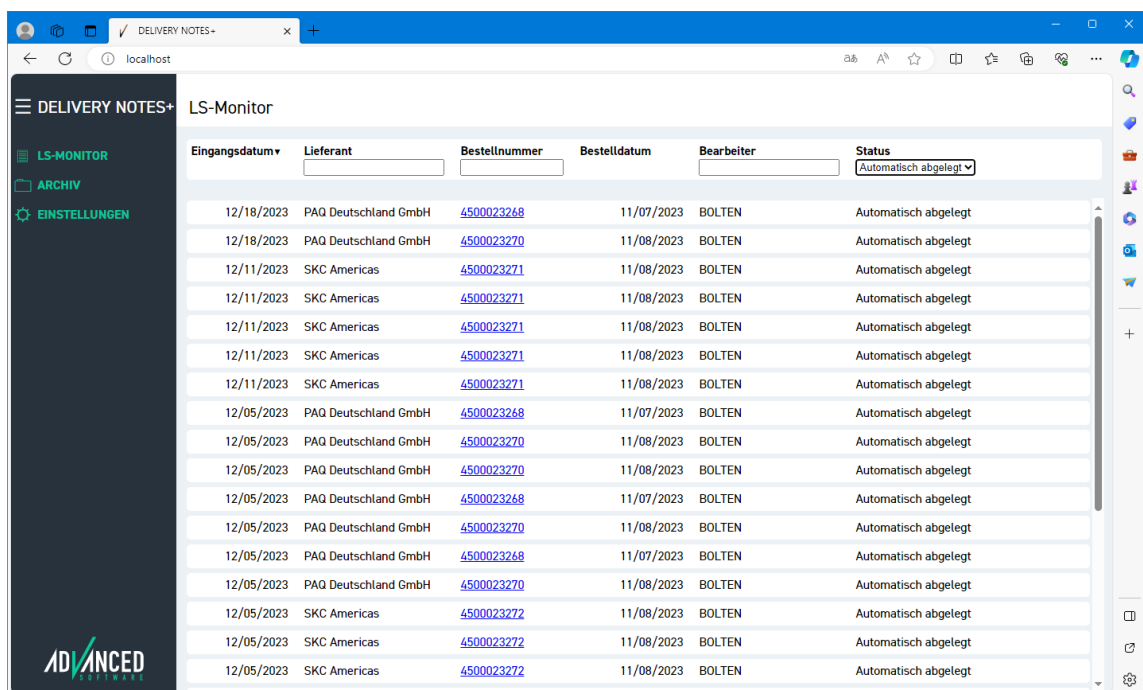
4.2 Automatic processing via DELIVERY NOTES+

4.2.1 „DN-monitor" (delivery notes monitor)

The DN monitor provides information and an overview of all received delivery notes. It also serves as a starting point for processing delivery notes that could not be processed fully automatically.

All delivery notes received via email through the central mailbox or digitized by scanning paper delivery notes and processed by DN+ are displayed.

As soon as a delivery note file arrives in the mailbox monitored by DELIVERY NOTES+, the software processes it and automatically extracts the relevant supplier data and order information. This data is then compared with the open orders. Based on this information, DELIVERY NOTES+ identifies the correct supplier and order with a very high degree of accuracy. In most cases, the delivery note is then automatically assigned to the corresponding SAP order. The processing results are clearly displayed in the DN Monitor.

Delivery notes are displayed as a list with one line per delivery note and contain the most important administrative information (date of receipt, supplier, order number, order date, processor). By default, the DN monitor displays the newest delivery notes at the top of the list. The DN monitor also shows the current processing status.

If the supplier cannot be identified due to damaged documents or faulty scans, or if no matching order can be found, or if several very similar orders prevent a clear assignment, the delivery note receives the status "Unassigned." Depending on the number and type of incoming delivery notes, a clerk should filter the delivery note list by status once a day or twice a week. The delivery notes listed there can then be processed and assigned via the interactive user interface.

To do this, a specific delivery note can be selected in the DN monitor's delivery note list by clicking on the corresponding line. This opens the delivery note in the editing interface.
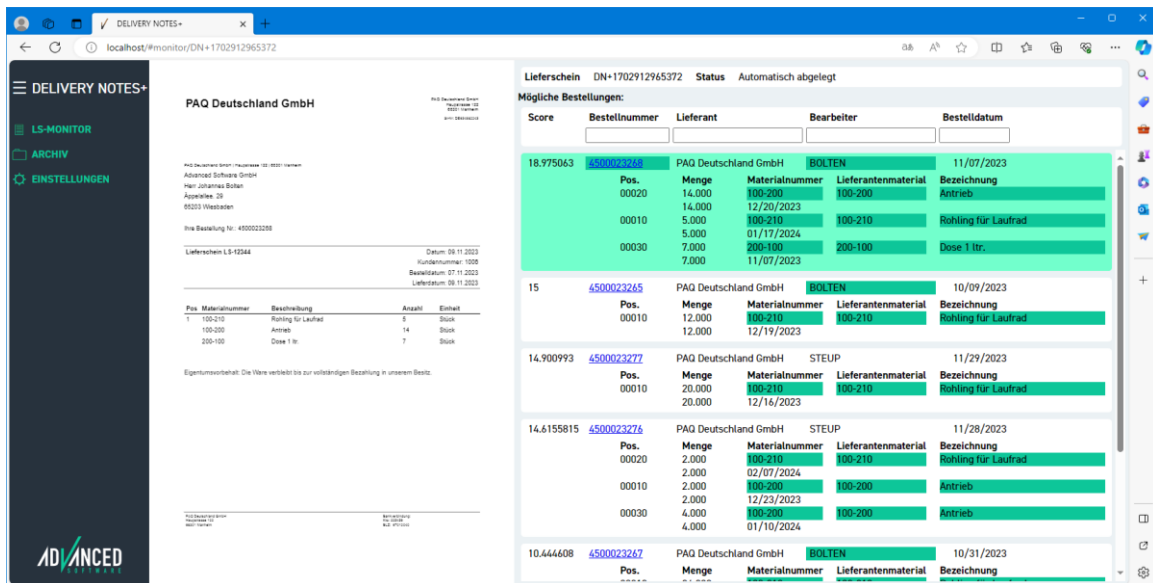
4.2.2 Interactive editing interface

Delivery notes that could not be automatically assigned to a specific order are processed via the interactive editing interface.

The interactive user interface is divided into two parts:

The delivery note is displayed in the left part of the editing interface.

The orders that may be related to the delivery note are displayed in the right part of the editing interface.

The matching data between the delivery note and the SAP purchase order are highlighted in green. The clerk selects the correct purchase order from this list and confirms the assignment. The delivery note is then assigned to the selected SAP purchase order and filed in the order's attachment list.

4.2.3 Options for archiving

Delivery notes, whether automatically or manually assigned, are saved as attachments to the corresponding SAP purchase order. If available, the delivery note can be stored directly in an archive system via the SAP ArchiveLink interface. This ensures audit-proof archiving of the documents and allows for their retrieval at any time with the click of a button. Conversion to PDF/A-3 format is available upon request, guaranteeing long-term recoverability. The paper version of the delivery note can be easily filed chronologically and destroyed after the legally required retention period has expired.

5   Implementation

DELIVERY NOTES+ consists of SAP and Windows components.

DELIVERY NOTES+ runs automatically in the background and processes every incoming delivery note immediately. The user interface is browser-based. This allows tablets to be used, if needed, to process delivery notes that could not be automatically assigned.

DELIVERY NOTES+ is based on SAP technology and uses only approved SAP standard interfaces to ensure seamless upgrades. The system is compatible with all current SAP systems from ECC 6.0 onwards. For older SAP systems, DELIVERY NOTES+ connects to the SAP system via RFC. For newer SAP systems, the connection is established via SAP Gateway, enabling the use of cloud-based systems as well.

DELIVERY NOTES+ typically runs on a Windows virtual machine. If the customer is already using a product from our Purchase-to-Pay suite, the same virtual machine can be used.

The installation is carried out remotely by our customer service team and is usually completed within one day, provided that an employee of the customer's organization is available to set the necessary access rights and permissions in advance or on the day of implementation.

6   Normal workflow und „best practices"

Upon receipt of goods, the delivery note is handed over along with the goods. This delivery note serves to check the goods for contents, quantity, and any damage. If necessary, notes can be added to the delivery note. Only the blank areas of the paper may be used for handwritten notes. Printed text must not be overwritten or crossed out.

The delivery note is then usually placed in a stack to be scanned later or filed in a folder.

If DELIVERY NOTES+ is used, the following points must be observed for further processing:

If a delivery note is placed on a stack and scanned later, it must be separated from the stack, as neither the scanner nor the software can distinguish between single- and multi-page documents. One solution is to place a blank sheet of paper between each delivery note and configure the scanner to create a new file for each one. However, this is an additional manual step that wastes time and paper.

We therefore recommend installing a scanner directly in the receiving area, dedicated exclusively to delivery notes. Each delivery note can then be placed directly on the scanner and scanned with a single keystroke. This creates a separate PDF file for each delivery note in the folder monitored by

DELIVERY NOTES+, regardless of the number of pages. Stack separation is then unnecessary.

Very good Wi-Fi scanners suitable for this purpose are available starting at around €400.

7   Conclusion

DELIVERY NOTES+ enables the fully automated processing of incoming delivery notes in connection with SAP orders. Manual user intervention is only necessary in exceptional cases. Since there are no investment costs and the software can be used immediately after installation, significant cost savings are possible.

8   Contact

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