



### **CASE STUDY 1 – Sales Order Processing**

Laserfiche (with Autostore) was used to move from a manual to digital workflow for Sales Order processing.

When a sale of office equipment is made to a customer, a number of documents have to be completed, signed and submitted. These include a credit application, a sales proposal, a sales order document which lists the equipment and service contract details, and a lease document.

The credit application, lease document and sales order can be filled in online by the sales representative and then printed. Alternatively the documents can be printed and then filled in manually. In both cases signatures are required from the customer.

Once the signatures are obtained by the sales representatives, the package of signed sales documents was physically handed over to the finance administrator located in Dartmouth NS. Once the product has been delivered and installed, the finance administrator invoices the sale, sets up the service contract, and distributes the lease documents and sales invoices to the Leasing Company via courier. The file containing the sales documents is physically handed to a contract administrator who reviews the setup of the service contract and invoices the service contract. Once the contract is invoiced, the contract administrator files the sales documents alphabetically under the customer's name in a filing cabinet.

Problems identified with this manual process that impacted productivity and cost.

- 1 The sales documents are stored in file cabinets that take up 16 to 32 square feet of office floor space and are located in Dartmouth. Sales representatives located in Dartmouth have physical access to these files which are located in the finance department but they must search manually to find a file or document. Sales representatives who are based outside of the Dartmouth office have to contact an administrative person in Dartmouth to retrieve previous copies of sales documents which are often required for reference for new sales. Turnaround time on these requests could be immediate or sometimes as long as 24 hours.
- 2 The files and documents would sometimes go missing (people borrowed them, didn't return them, misfiled them, etc.). As a result people in the sales chain (sales representative, customer service representative, finance administrator, contract administrator, sales manager) started to keep their own set of documents at their desk or in filing cabinets in other offices. It was determined that there as many five sets of documents printed and filed for every transaction. It was also determined that not all copies on file were consistent as often updates or add on items were not filed in all locations.

A digital workflow for Sales Order Processing was implemented using Laserfiche, Autostore and Outlook.

The sales documents are still printed and signed by the customer. Once the documents are signed they are scanned into central email box and the package of documents is sent by courier to the finance administrator. Autostore monitors the activity in the central email box and when a file is identified, it indexes the file and places it in an "New" folder in Laserfiche. The finance administrator located in Dartmouth, is notified that there is sales paperwork to review. They open, review and approve the sales order documents which are then moved to a pending folder in Laserfiche. An email notification with a link to the documents is sent to the sales rep. Once the product is delivered the sale is invoiced and the service contract is set up. The original lease document is sent to the leasing company but all other hard copy documents which were submitted by the sales representative are discarded. The file containing the sales documents is approved by the finance administrator for contract review and invoicing, the contract administrator is notified who then opens the file electronically, reviews the accuracy of contract set up and invoices service contract. The entire file is approved online by the contract administrator and it is automatically archived in Laserfiche.

The benefits of implementing a Laserfiche digital workflow are the following.

1. The documents are indexed by Autostore and managed and archived in Laserfiche. The administrator no longer has to make or save file copies saving time and money.
2. Documents that are archived can be easily retrieved online by both the administrators and sales people. This has eliminated the requirement for sales representatives to call the administrator in Dartmouth to obtain copies of existing transactions saving resources and time.
3. The digital workflow has eliminated the need by anyone in the sales chain to keep physical copies of the sales documents. This has reduced storage costs and improved both retrieval time and document accuracy.
4. The review and invoicing of the service contract is now done online eliminating the physical distribution of hard copy files
5. Other documents can be easily added at any point to existing files in Laserfiche along with notes are related items. Everyone in the process is working from the same set of documents.