



Have you ever wished that there was an easier way?

# Streamlining the Sales Order Process

## CCS Presentation Systems

Since 1990, CCS Presentation Systems, Inc. has expanded from a single sales representative into one of the world's largest dealers of presentation technology equipment and services. Headquartered in Scottsdale, AZ and with offices across the nation, CCS has emerged as the preferred supplier to the Corporate, Educational, Government and Non-Profit markets. CCS' business consists of product sales, installation services, project management and systems integration.

## Business Challenge

As with most sales & service enterprises, their methods and processes for handling sales orders simply evolved over the years to the point where, at the Scottsdale office, each of 200 – 250 orders per week were requiring “hands on efforts” from as many as 9 or 10 different people. These time and labor intensive efforts were simply not getting done since the manual approach involved a lot of “people waiting on people”. Sales order packets were getting miss placed – therefore delayed – and sometimes lost. The “ball would get dropped but nobody noticed”.

## The Solution

Early in 2006, using the Scottsdale AZ office as a model, CCS embarked on an effort to find better ways to manage their sales order activities. The immediate goal was to find ways to automate the sales packet process and to begin to realize their strategic goals for growth through process management.

CCS selected DocBox with its integrated WorkFlow, Forms and Archive solutions because it provides the tools necessary in an easy to deploy and use package. CCS began their automation efforts initially by defining the documents and packets they wanted to generate and track. By early March, 2006 they were ready to roll out their initial two electronic forms and one WorkFlow driven by the Forms and other scanned documents.

By May, CCS was able to identify, build and implement an additional 8 forms, each with different WorkFlows to handle their various types of orders. According to Tom Maricle of CCS, the easy-to-use Flow Builder not only makes it possible to quickly put together and implement a solution, but provides for quick analysis and review – based on actual results – and a fast way to modify processes for “fine tuning” to get maximum efficiency. In Tom's words “the ability to make improvements based on actual results allows the entire order packet process to get better and better!”



## Benefits

- Streamlined Sales Order Process
- Increased Productivity and Accountability
- Eliminated Manual Data Entry
- Real-time Order Status
- Documented Audit Trail of Order Process
- Eliminated of Paper Records
- Increased Accuracy of Orders
- Reduced Operational Costs
- Provides Disaster Recovery

The screenshot displays the CCS Presentation Systems web application. At the top, there is a navigation menu with icons for Home, Search, Routing, Forms, Import, Profile, Admin, Reports, and Security. Below the menu is a workflow diagram with steps: Start WorkFlow, Drawings Kickoff Form, Drawing Requested, Display Indexes, and Accept/Deeny. The main content area shows a 'Sales Order Kick Off Form' with a 'Submit Form' button. The form includes the following fields:

- \* Customer Name (text input)
- \* Sales Rep (dropdown menu)
- \* Sales order # (text input)
- \* Install (checkboxes for Yes and No, with No selected)
- \* Rush (dropdown menu)
- \* Credit Card (dropdown menu)
- \* Original Quote (dropdown menu) and \* Number (text input)
- \* Maintenance Plan (dropdown menu)
- \* Time Frame (text input)
- Main contact (text input)
- Phone Number (text input)
- Project Manager (dropdown menu)
- Site Manager (dropdown menu)
- Drawings (checkboxes for Yes and No, with Yes selected)
- Engineer (text input)
- Sales Order Revision # (text input)
- Reference (text input)
- Notes (text area)