




Efficient management of sales processes with an OpenText Documentum D2 solution from fme



Benefits

-  Significant time savings in the management of all documents generated during the sales process
-  Increased transparency and traceability of sales transactions
-  Adherence to compliance requirements and thus cost savings in audits



We create chemistry

»The OpenText Documentum D2-based fme solution accompanies and facilitates our sales processes. It accelerates the daily work of our sales and contracting units enormously and impresses with a high level of adaptation to the business processes. The functionality and surface of the application is also individually adapted to the different needs of the respective subject area.«
(Pascal Biada, Contracting and Service Charging, BASF SE)

Technology

- OpenText Documentum D2 Version 4.6
- OpenText Documentum Content Server 7.2

Further information on www.en.fme.de

Challenge

BASF SE's Sales and Contracting units are responsible for handling internal and external sales of technical equipment and engineering services. The customer enquiries, quotations, internal calculations, contracts and numerous correspondences that have been created have mostly been filed in paper form so far. Working together on these documents was cumbersome. The aim of the units was to replace the existing sales and contracting processes with paperless procedures and to simplify management of sales transactions.

Solution

fme developed individually customized functions for each of the two groups based on a joint OpenText Documentum D2 application. Due to the high configurability of D2, fme AG's solution can be expanded at any time, can be quickly adapted to changing business processes and can be extended to other departments. Document filing now takes place at a central location. In addition, all documents are allocated to a specific transaction in order to ensure traceability of the processes. The solution controls the life cycle of all processes and documents via an advanced status management. Metadata is entered only once per process. Free full text searches and ready-made search forms now save valuable time. Workflow elements are also used to assign review and approval processes to employees, thus making business processes transparent and accelerating them. In the future, the expansion of the implemented process control and mobile access via cloud functionalities is planned.