

CASE STUDY

Automating Sales Workflows for Consistent, Professional Customer Communication



ABOUT

WOLF is a global leader in heating, residential ventilation and air handling solutions. The company provides innovative products and tailored systems for residential, commercial and industrial applications, ensuring a healthy indoor climate.



www.wolf.eu



2,000+ employees



Heating, Ventilation, AC

CHALLENGE

WOLF needed a streamlined way to consolidate customer data from multiple entities into a clear format. The sales team needed quick access to relevant information for customer visits and opportunities. At the same time, they had to document changes and customer inquiries seamlessly. With data spread across various templates, e.g. letters, orders, offers, and contracts, WOLF sought a solution to optimize this complex process.

SOLUTION

WOLF addressed these challenges with DocumentsCorePack, seamlessly integrated into their Dynamics 365 Sales and used across multiple branches. Users benefit from simplified document processes via One-Click-Actions. In Addition, Power Automate integration enhances and streamlines their sales processes through document automation.

01 ▶ Faster & More Efficient Document Generation in the Sales Process



With DocumentsCorePack, WOLF fully automated multi-step sales processes. For example, quotes (customized to their requirements) are automatically generated, sent to customers via the DocumentsCorePack Connector in Power Automate, and stored directly in the quote in Microsoft SharePoint, saving significant time.

02 ▶ User-Friendly & Flexible Template Designer



DocumentsCorePack's Template Designer offers an intuitive, efficient, and flexible solution for creating templates in Dynamics 365 with various designs. Integrated into Microsoft Word, it allows even users with minimal technical skills to design a wide range of templates. With drag-and-drop functionality, users can easily insert fields, configure automatically populated tables that adjust based on record numbers, and add images, logos, and QR codes.

03 ▶ Standardization & Reduction of Errors in Documents



DocumentsCorePack standardizes document generation, ensuring uniform, professionally formatted documents adhering to WOLF's Corporate Design. Automated data integration minimizes errors, eliminating typos, transmission issues, and outdated information. This results in consistent, clear, and professional communication with their customers.



CONCLUSION

The implementation of DocumentsCorePack has significantly benefited WOLF by streamlining their document generation and sales processes. By integrating the solution with Dynamics 365 Sales, WOLF achieved seamless access to critical customer data and optimized workflows across multiple branches. Automation of multi-step processes, such as quote generation and storage, has saved considerable time and reduced manual effort. The intuitive Template Designer further empowered users to create professional, customized documents without requiring technical expertise. Standardization across templates has minimized errors, ensuring accurate, up-to-date information and enhancing the clarity and professionalism of customer communication. Overall, DocumentsCorePack has improved efficiency, reduced errors, and fostered a more consistent, streamlined experience for both WOLF and its customers.

Are you ready to revolutionize the way you handle your documents too?



START YOUR 14-DAYS FREE TRIAL!

All features and support included



“ DocumentsCorePack has been deeply embedded in Dynamics 365 Sales at WOLF for several years and has made a positive impact on many areas of our sales process, helping our employees work more efficiently in their daily tasks. Thanks to its versatile capabilities and high flexibility, we can continuously adapt our templates to meet day-to-day requirements. Throughout this process, the DCP support team has always been available to assist us quickly and effortlessly. ”

Michael Kistler, Product Owner Sales Management Tools