

Davies Reduces Time to Generate Purchase Orders from 3 Days to Just Minutes, Saving More than \$60,000 Annually Using Conga Composer

Industry

Manufacturing & Distribution

Use Case

Purchase Orders

Solutions

Conga composer

Salesforce Sales Cloud®

Microsoft Word®

Consulting Partner:

RED ARGYLE

“The ease of implementation with help from Red Argyle and Conga and the immediate return on investment from Conga Composer has helped us to better utilize Salesforce to support our business.”

– Mike Nguyen, IT and Operations Manager

Business Challenge

As the largest independent remanufacturer of office furniture in the United States, Davies Office™ generates a significant number of purchase orders — 10,000 per year. Prior to implementing Conga Composer® integrated with Salesforce Sales Cloud, Davies’ salespeople would copy all of the pertinent opportunity information into a spreadsheet and send it to a Purchasing Administrator to create an Excel-based purchase order. This manual process required seven steps and on average took three days to reach a finalized PO. In addition, Davies utilized several different spreadsheet formats and stored them locally on the company’s network, which made managing and finding them difficult.

Details

- Approximately 10,000 purchase orders generated each year
- Formats varied widely based on personal preference
- Manual time before Conga solution — 7-step process took 2 hours over a 3 day period on average to complete a finalized purchase order

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Order Date: 11/20/2013		Purchase Order: 11/20/2013																																											
Requested Amount: \$1,344.00		Status: Open PO																																											
Vendor Information	Ship to Address	Terms & Conditions																																											
Vendor: Test Supplier Account Attn: Garry Polmateer Phone: 800-441-2441 E-mail: garry@redargyle.com	Davies Office Remanufacturing Inc. 48 Lansdowne Road Albany, NY 12244	All orders must be confirmed Payment must be received 45 days prior to shipping any product Payment will be made by check or wire transfer. Payment by credit card is subject to credit review and approval. Payment terms: Net 30. Payment by check is subject to credit review and approval. Payment by ACH is subject to credit review and approval. Payment by ACH is subject to credit review and approval. Payment by ACH is subject to credit review and approval. Payment by ACH is subject to credit review and approval.																																											
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Success Strategy

Garry Polmateer with Salesforce® consulting firm, Red Argyle, spearheaded the implementation of Conga Composer and helped Davies build a master template for purchase orders that would populate with data from the Opportunity record and other custom objects in Salesforce. In moving to a single template, Davies realized they would have greater flexibility and control over brand consistency with a Word format. Today, Purchase Admins generate POs directly from the Opportunity record in Salesforce. With the click of a button, Conga Composer generates the document and attaches it to both an email to send (or occasionally fax) to the vendor and back to the Salesforce record for centralized storage. Conga Composer also automatically updates the record status, giving Davies the ability to track and report on purchase orders quickly and easily. The whole process now takes less than eight minutes to complete — even less if the PO can be emailed instead of faxed.

Benefits & Results

Conga Composer has reduced the time Davies spends creating and sending purchase orders from 2 hours over 3 days to less than 8 minutes. Davies estimates this time reduction equates to more than \$60,000 in annual savings with an ROI payback period of three days. Furthermore, Davies has standardized both the purchase order template and process companywide, ensuring consistent presentation to vendors, centralized storage of final documents and greater ability to track and report on PO status.

- Cost Savings & Payback** – \$61,000 annually with an ROI Payback Period of 3 days
- Time Savings & Improved Efficiency** – Reduced time spent creating and sending PO from 2 hours over 3 days to less than 8 minutes, which has improved the efficiency of both the sales team and the purchasing group
- Increased User Satisfaction** – Purchase Admins can quickly create and send purchase orders with a greatly reduced risk of data errors or sending to the wrong email address. purchase orders are stored centrally in Salesforce so everyone who needs access to the documents can find and easily see the status of any given PO. Vendors receive consistent and accurate purchase orders the same day.
- What made the Conga solution stand out?** – Conga Composer’s flexibility and deep integration with Salesforce set the solution apart from competitors. Since all of the data resides in one place, Davies is able to take a unified approach to their entire PO process and mitigate the chance for errors. This also led to easier adoption for users who only had to learn one system. With one master template to maintain and use, the company retains control and consistency of the output while customizing content for each vendor.
- Additional Use Cases** – Since this initial use case Davies has identified two other areas to utilize the capabilities of the Conga Suite™:
 - Sales Quotes
 - Manufacturing Orders for the Production Team