

CASE STUDY

Optimized Document Workflows for Enhanced Sales Process Efficiency



ABOUT

TRYBA, founded in 1980 and headquartered in Gundershoffen, Alsace (France), specializes in high-quality windows, doors, and shutters. Renowned for its commitment to quality and energy efficiency, the company serves both residential and commercial sectors across Europe. With a strong network of franchisees, TRYBA is a leading name in the home improvement industry.

CHALLENGE

TRYBA faced challenges in automating document generation, which is vital to their operations. They needed a solution to efficiently handle a variety of document processes from their CRM for various customer interactions, including quotations and certificates. The complexity of some documents required conditional displays based on specific criteria. Additionally, seamless integration with DocuSign for electronic signatures was crucial for signing key documents. The company also needed a system to trigger subsequent actions, like sending emails, updating workflows, and storing documents on SharePoint after editing.

SOLUTION

Recognizing the pressing need for an efficient solution to streamline their document processes, TRYBA conducted thorough research on various options. Ultimately, they selected DocumentsCorePack (DCP) as their solution of choice. The integration of DocumentsCorePack brought numerous benefits, significantly improving their business operations:

01 ► Optimized Document Processing across the entire Sales Funnel

DocumentsCorePack was integrated across all of TRYBA's sales processes, including quotations, order confirmations, invoicing, after-sales service, and more recently, even for letters. The implementation of DCP allowed TRYBA to utilize both generic and personalized documents tailored to the needs of each company within their network.

02 ▶ Reduced Complexity & increased Productivity



The implementation of automated document generation using the DCP Connector for Power Automate proved to be highly advantageous for TRYBA. This solution allowed them to efficiently manage and produce multi-part documents, which are integral to their business processes. Integration with DocuSign for e-signature was a crucial element for signing key documents, enabling TRYBA to address a critical need with greater ease and accuracy, enhancing overall productivity and ensuring that complex document requirements were met without manual intervention.

03 ▶ Improved User Experience



By utilizing the Template Designer in Microsoft Word, TRYBA accessed a powerful array of design features, which greatly enhanced the efficiency and ease of their document management. Additionally, DocumentsCorePack's import and export functions allowed them to seamlessly transfer documents between different environments, ensuring consistent and smooth ALM.



CONCLUSION

DocumentsCorePack has significantly enhanced TRYBA's document workflows by automating the generation of complex documents and managing multi-part processes. This automation has resulted in substantial time savings and a reduction in errors. The integration with DocuSign has further optimized the process by simplifying electronic signatures, boosting overall workflow efficiency. The user-friendly interface and comprehensive features have also made document management more intuitive and efficient for the TRYBA team.

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



START YOUR 14-DAYS FREE TRIAL!

All features and support included



“ Once you get the hang of it, using DocumentsCorePack becomes a truly enjoyable and seamless experience. This solution is packed with a wide array of features that make generating even the most complex documents a breeze. The support team is exceptionally attentive, responding to our inquiries promptly and thoughtfully. They consistently address our concerns and adapt the system to meet our needs, ensuring a smooth and efficient process every step of the way. ”

Marc Giraud, Project Manager