

SUCCESS STORY



Offer creation tool with
TW Solutions DocBuilder

Gilgen Door Systems



+ 1'100
employees

+ 70 countries
agencies

+ 150 products
in div. variants

INITIAL SITUATION

Gilgen DS uses an SAP ECC landscape. The individualized and sometimes very complex offers were previously created in MS Word. This was very time consuming, error prone and the connection to SAP was nonexistent. From now on, the quotations were to be created based on the SAP SD module. For this purpose, TeamWork developed a quotation tool that could cover the extensive requirements of Gilgen DS. TW Solutions DocBuilder is now used to generate the quotation documents. This standard solution accesses both SAP and third-party data-sources and creates the offer documents in either DOCX, PDF or PDF/A file formats. The base for the generation are MS Word templates which are structured similarly to a serial letter. But the fields from SAP or third-party solutions are connected to data sources and are more powerful. Thanks to this MS Word standard technology, it is possible for the business departments to create and modify forms without any developer knowledge and participation. The dispatch of offers works in a similar way. The customer data from SAP is transferred to MS Outlook, predefined texts are added and the offer is attached as a PDF file. The entire quotation process at Gilgen DS is now user-friendly, automated and efficient.

CHALLENGES

In a first step, the prerequisites for the complex quotation creation in SAP had to be established. At Gilgen DS, a quotation consists of many individual components, variants, and items, and it must be possible to create them in three languages and in different versions. The main challenges for TeamWork consisted of the user-friendly creation of complex quotations in SAP, the customer requirements for the design of the quotation documents, and the automated dispatch process via e-mail.

Gilgen DS an overview

Gilgen Door Systems AG is a supplier of automatic drive systems and complete installations for door and gate systems. The company was founded in 1961 and is headquartered in Schwarzenburg, Switzerland. More than 1,100 employees worldwide are on duty every day, ensuring the high availability of its automatic systems. The company is represented by sales and service partners in Europe, Asia and overseas in the respective key markets and has subsidiaries and its own service centers in Germany, France, Italy, Austria, China and Australia.

SOLUTION

DocBuilder is fully integrated into the SAP environment as well as into MS-Word and uses the advantages of both worlds. The quoting process is conducted in the following steps:



Today, the offer process is very lean and standardized. With DocBuilder, both the efficiency in the offer process and the quality could be significantly increased. In detail, this is structured as follows:

1. The quotation data including the positions are entered in the SAP quotation tool by the Gilgen DS customer service center. For this purpose, the quote tool developed by TeamWork based on SAP SD is used.
2. The documents are generated automatically from SAP with the addition of third party data sources (e.g. images, technical documents, etc.) via TW Solutions DocBuilder using the MS Word templates.
3. The MS-Word document can be customized by the employees of the customer service center. Once checked and approved, a PDF document is automatically generated.
4. The PDF document is transferred by TW Solutions DocBuilder to MS Outlook ready for dispatch, including e-mail address, subject and mail text, and can be sent directly.



„TeamWork has provided us with excellent support and we are very satisfied with the new solution. The quotation process now works more efficiently and more reliable than with the old individual solution. What more could you want?“

Christian Winkler, Project Manager, Head of the Customer Service Center

HIGHLIGHTS

- Preparation and processing of offers with integration of various data sources
- Management of offer items with integrated price calculation in SAP SD
- Generation and management of different versions and variants of an offer
- Offer processing assignment and tracking functions
- Document management integration
- Dynamic export of offer forms via TW Solutions DocBuilder with editing option in Microsoft Word
- Generate a PDF export of the offer and send it by mail with dynamic text content
- Possibility to adapt the offer templates by the customer service department
- Multilingual: German, French, Italian

The image shows three overlapping documents from Gilgen Door Systems. The leftmost document is a standard quotation form with fields for company details, project information, and a list of items with prices. The middle document is a more detailed quotation form with a table of items and a summary section. The rightmost document is a promotional flyer for a door system, featuring an illustration of a car and text about the benefits of the system.

ADVANTAGES FOR GILGEN DS

- Efficient, user-friendly SAP tool for complex quotation creation
- Data and documents can be used from SAP and several surrounding systems
- Flexible and simple to modify form templates in MS-Word
- Several offer variants / options possible within one offer
- Automated e-mail creation. PDF offer, email address, subject and cover letter are applied dynamically.
- Multilingual DE, FR, IT



"The feedback from the users is very good. It's a pleasure to see that the solution is appreciated and that it provides users with optimal support in their daily work."



Basil Wirz
SAP Senior Consultant
TeamWork

ABOUT TEAMWORK

TeamWork is an independent, internationally operating SAP full-service provider with over 1'200 employees. From its headquarters in Geneva, its offices in Bern and Zurich, and 20 other global locations, TeamWork implements local and international SAP projects.

As a founder-run company owned by the Rey-Gorrez family and the respective local management, TeamWork operates independently of investors and is characterized by a high degree of flexibility and enthusiasm for its customers.



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