Document Management for Sales Teams

Element3 Solutions have partnered with World Class technology providers to give our customers access to best of breed technology systems, enabling turn-key, highly effective business software solutions.
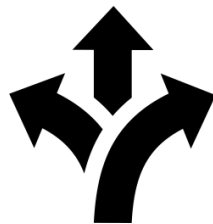
M-Files®

Documents used in the sales cycle are often the first impression your businesses may leave with your customers. Creating and using these documents in an efficient an effective way can be the difference between getting the deal and not. M-Files drives true efficiency by combining client data with well prepared and approved documents, ensuring what goes out of your business is consistent, accurate and managed.

PREPARE

Without easy access to contracts, procurement teams and contract managers risk eroding the value of agreements. M-Files unifies contracts and contract data into a unified view to make sure that everyone collaborates on the same version.

USE

M-Files maintains a full audit history and version control. Automatic permissions ensure that only authorized users have access to the data. On the buy side, organizations can achieve higher savings by reducing "off contract" spending by tracking rebates and ensuring that negotiated savings are captured.

MANAGE

Automating contract management increases efficiency and streamlines processes. In M-Files CM, automatic workflows seamlessly move contracts through their lifecycle and consistently keep staff updated on new tasks using notifications and assignments (i.e. pending signatures).

M-FILES GIVES COMPLETE VISIBILITY OF THE DOCUMENTS IN YOUR SALES CYLCE

Prepare Quality Proposals
Drive efficiency and quality control by leveraging the power of M-Files document templates. Quickly and accurately generate sales proposals that synchronise with system data, eliminating manual, time consuming and risky copy and paste methods of re-producing similar proposals.

Maintain Product & Services Information
Ensure that your sales team have access to only the latest approved product or service information, removing the worry of sending obsolete and out-dated information to your potential customers.

Track Quotes
Ensure all quotes are followed up by applying a deadline to the quotes validity. M-Files will automatically alert quotes that are nearing their expiry, helping the sales cycle progress.

Manage Incoming Sales Orders
Capture and drive sales orders through a digital workflow, ensuring your business process is followed, but not slowed down by manual paper handling processes. Orders are processed fast, and full visibility is maintained throughout the process.

Historic Deals and Promotions
Quickly access historic documents and information that may have been prepared for your customers or new opportunities to ensure your consistent and relevant information is being provided.

Share and Collaborate
Break down information silos and let the sales team as a whole benefit from the group's activities by sharing and collaborating on opportunities and common prospects and opportunities.

Element3
SOLUTIONS