



This customer* is one of the largest distributors of plumbing supplies and pipes, valves, and fittings as well as one of the largest distributors of heating and cooling equipment in the United States.

CHALLENGE

With tens of thousands of employees in more than 1,000 service centers throughout the Western hemisphere, this company submits a plethora of written proposals that generate billions of dollars in annual sales. From the smallest to the largest project, this company must maintain accuracy and consistency in all of its submissions. This accuracy and consistency become all-the-more challenging considering that its submissions relate to product specification sheets with nearly 100,000 SKUs.

“ We have to ensure that our proposal submissions have a consistent look-and-feel and use only the current version of product literature that we receive in multiple file formats from our suppliers. We chose not to dedicate the time or personnel to develop a content-enabled version of our application ourselves once we discovered that the Datahaven Toolkit gave us exactly what we needed out-of-the-box

-- {Confidential}, Digital Data Production Manager

SOLUTION

By combining its proprietary sales management application with the Datahaven Toolkit, this company sought to facilitate the document assembly process required to generate sales-related submissions. With the Datahaven Toolkit, developers have full programmatic control over the entire document assembly process.

This company accomplishes its goal of creating accurate, consistent, and comprehensive sales-related submissions in two stages. The first stage employs the Datahaven Toolkit to capture and store all image content (regardless of file format) related to its product lineup and organizes all of these product images into a digital catalog. The second stage involves the actual document assembly process that relies on user selections and pre-defined business logic to build the contents of each submittal using the most current product specification sheets. The result is a custom submission package consisting of a unique combination of fixed and variable content.

Fixed content include such elements as a submittal's cover page and trailing disclaimer page. Variable content include such elements as the body of the submittal that is generated based on user selections. Once the Datahaven Toolkit creates these elements, it dynamically formats the table of contents of the particular submission by taking an empty template and programmatically adding text annotations to name individual section headings and list their corresponding page numbers. Finally, the Datahaven Toolkit adds headers and footers to each page in the submittal to ensure consistent use of this company's branding. This company then has the option to print, fax, email, or export the resulting package for submission.

Using the Datahaven Toolkit, this company has created an efficient and consistent tool to format its sales-related submissions and enforces automated control over an otherwise manually-intensive and error-prone process.

* The company has requested that we withhold its identity.