



Sales in the Field

Are reps able to create orders on the fly?

Compiled by: Elizabeth Marvel, Office Technology Magazine

Following are two questions submitted by a dealer member as part of BTA's Dealers Helping Dealers resource and many of the answers received. These answers and others can be found in the members-only section of the BTA website. Visit www.bta.org/DealersHelpingDealers. You will need your username and password to access this member resource.

Can your sales reps create sales orders quickly and easily on demand in the field? If so, how (e.g., digitally, DocuSign, etc.)?

“They can access SalesChain on their laptops and send documents electronically with DocuSign built into SalesChain.”

Jeffrey Taylor, president

Kingsport Imaging Systems Inc., Kingsport, Tennessee

“No. All sales orders must be sent to the office for review and conversion. Sales reps can create sales quotes that are sent to customers for approval. The quotes are then forwarded to the office for approval.”

Jeffrey Persha, staff accountant

Advanced Business Systems Inc., Watertown, New York

“Yes, our sales reps can quickly and easily create sales orders in the field, and it all ties back to ConnectWise at the core of our operations. ConnectWise offers ConnectWise CPQ, a configure, price and quote platform, which is a cloud-based sales, templating and quoting tool. The CPQ system houses all of our products, pricing, descriptions and photos, enabling sales reps to build a quote in real time while meeting with a client. Once finalized, the quote is sent electronically for review and signature. The platform also supports iterative updates, making it simple to revise and resend if changes are needed. This streamlined process ensures that our team can provide fast, accurate and professional proposals on demand, while maintaining efficiency and transparency between the client and our internal operations.”

David Priestley, director of managed services

Donnellon McCarthy Enterprises, Cleveland, Ohio

“No, not really. We use SalesChain and DocuSign. If a rep



wants to do it in the field he (or she) can. However, it is not very quick to do in the car or customer office.”

*Stephen Valenta, president/owner
Offix, Gainesville, Virginia*

“Yes, either electronically with our one-page sales form or they fill it out manually, if needed.”

*Brian Bence, executive director of sales
SVOE, Verona, Virginia*

“We use SalesChain and they have this as part of transaction processing. The digital forms work great.”

*Peter Napolitano, sales manager
United Business Systems, Buffalo, New York*

“We are almost finished with this project. We will use the Adobe suite of tools and Adobe Sign for this. It is much cheaper than DocuSign and you get a lot more tools than just an e-signature.”

*Ron Hulett, president & CEO
U.S. Business Systems Inc., Elkhart, Indiana*

“We have digital, but most customers issue us paperwork.”

*Mike Boyle, president
Base Technologies, Bethel, Connecticut*

“We are in the process of changing our sales process to use Microsoft automation and it has been working great for us to facilitate all processes in sales.”

*Michele Lopez, director of marketing and operations
Barlop Business Systems, Miami, Florida*

“Our representatives can create sales orders from the CRM, convert the files to PDFs and then send them to the clients using DocuSign. They cannot do this while in the field, but we have taught the reps how to create a blank order they can complete by hand in the field on the fly.”

*Brad Osborn, vice president/general manager
Fruth Group Inc., Phoenix, Arizona* ■

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