CASE STUDY | ENERGY AND UTILITIES | SALESFORCE INTEGRATION

36,000 users, 100+ countries, document automation integrated with Salesforce.

How Hitachi Energy (formerly Hitachi ABB Power Grids) produces business-critical tender documents for its turnkey power grid systems, straight from Salesforce.



ActiveDocs

ActiveDocs generates business-critical tender documents for the 36,000 people at Hitachi Energy, in more than 100 countries.

ActiveDocs

INDUSTRY

ENERGY AND UTILITIES

PRIMARY BUSINESS

Turnkey power grid systems.

CHALLENGE

Produce complex, high-value tender documents for a global business, accurately and quickly, without depending on siloed IT teams across time zones.

SOLUTION

ActiveDocs integrated with Salesforce. Data Views pool customer and product data, the right template is selected automatically, and approval workflows control template and document changes.

BENEFITS

Local and specialist teams maintain their own templates, IT dependency is reduced, and every document in the customer journey is generated centrally and auditably.

www.activedocs.com

ActiveDocs was selected for implementation at Hitachi Energy based on its proven track record generating superb documents and providing powerful template management.

Hitachi Energy (formerly Hitachi ABB Power Grids) uses its existing Salesforce platform with ActiveDocs to cost and configure tender documents for its turnkey power grid systems, drawing on resources from around the globe. After years of success with ActiveDocs at ABB, it was the natural choice.

These complex, high-value tender documents apply rules to global data. Siloed IT teams across time zones made templates hard to keep current, and manual approvals slowed changes.

Hitachi Energy needed to empower local teams and reduce IT dependency.



Our Solution

Salesforce is the starting point for every tender document. Users identify the customer and product, ActiveDocs Data Views pool the relevant data, and the right template is selected automatically.

The compilation engine merges the data into the template and generates the finished document pack, with follow-on steps such as format reviews preset or left to the user.

Business Benefits

Teams own their templates. Local and specialist teams make changes immediately, freeing up IT. Approvals ensure content is reviewed before publishing, and master content is tamper proof.

Centralized and auditable. Every document in the customer journey is managed through ActiveDocs.

How it Works

Pull or push data. Data from Hitachi Energy's systems feeds Document Wizard questionnaires or generates a fully automated document. Template designers collaborate across divisions, breaking down internal silos.

Controlled changes. Workflows govern any changes to generated documents before release, and watermarks and document properties are fully customizable.

Delivered every time. Delivery Channels send each finished document to the right storage location, and supplemental documents can be generated from predetermined triggers.

Key Features

Data Views: customer and product data pooled from Salesforce and global data sources, so the right template and content are selected automatically.

Template Management: an easy-to-use interface for local and specialist teams to design, update and approve their own templates, without depending on IT.





ActiveDocs
Document Intelligence

Greatest speed, success, and minimum risk.

See how ActiveDocs could work for your organization. Request a demo to see how ActiveDocs helps large organizations produce complex, high-value documents with speed and accuracy.

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