



# Digital Document Automation

## End-to-End Digital Process Automation for Sales Agent

### e-Contracts



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# 1. Introduction

Stonebranch builds IT orchestration and automation solutions that transform business IT environments from simple IT task automation into sophisticated, real-time business service automation. No matter the degree of automation, the Stonebranch platform is simple, modern, and secure. Using the Stonebranch Universal Automation Platform, enterprises can seamlessly orchestrate workloads and data across technology ecosystems and silos. Headquartered in Atlanta, Georgia, with points of contact and support throughout the Americas, Europe, and Asia, Stonebranch serves some of the world's largest financial, manufacturing, healthcare, travel, transportation, energy, and technology institutions.

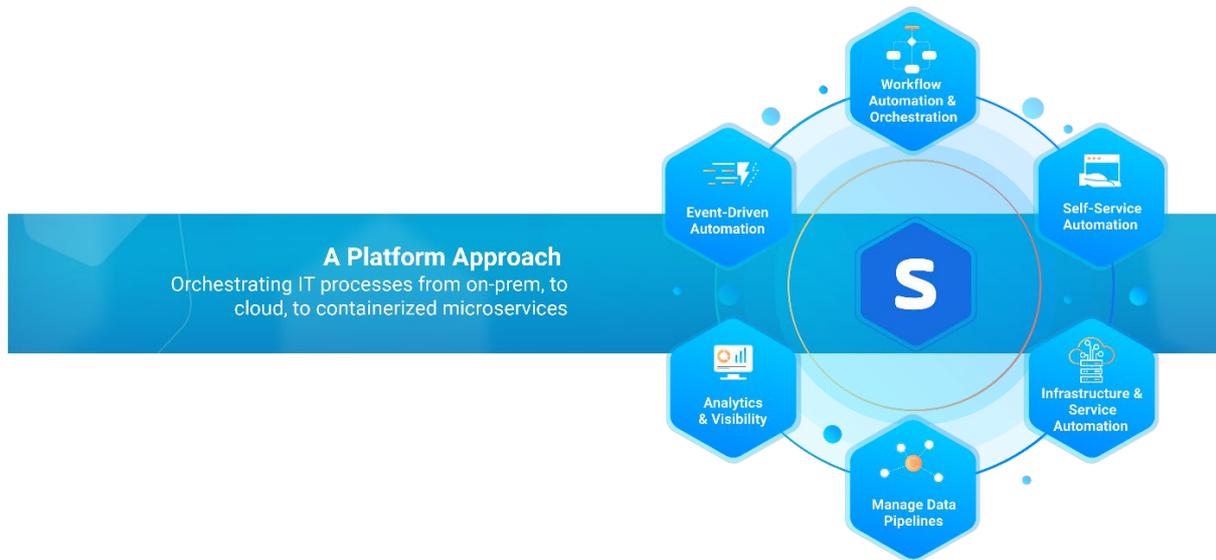


Figure 1: Real-Time Hybrid IT Automation Platform - Overview

Stonebranch offers the most modern real-time IT automation and orchestration platform designed to centrally manage and orchestrate automated jobs, tasks and workflows across hybrid IT environments from on-prem to the cloud. Within the UAC platform, we have five key solution areas. The focus is to provide an expandable and future proof solution where you can automate and orchestrate anything you need from a single platform.



Figure 2: Key Solution Portfolio

## 2. Scope of the Document

This whitepaper describes Vorwerk's new complete digital process for how to electronically sign, archive, search and retrieve a contract for a new sales agent.

## 3. Prologue

The Vorwerk business model comprises the development, production and direct sales of exceptional products and services. The range includes superior household products, e.g. Thermomix kitchen appliances, Kobold vacuum cleaners, Twercs power tools and Lux Asia Pacific air filters and water purifiers, as well as cosmetics, carpets and floor coverings. More than 645,000 people are working for Vorwerk around the world, and over 633,000 of them are independent sales partners. The remaining 12,000 are employees.



Figure 3: Thermomix ® TM6 Smart Cooking

For Vorwerk, an automated digital process of managing the growing amount of sales contracts for new sales partner was key to their continued success and growth. Any manual process leading to inefficiencies, issues with accessing the documents, or slow processing is basically a growth inhibitor and a legal risk, and should be avoided.

Therefore, a new dynamic IT solution to digitally sign a contract for a new sales agent has just been introduced, providing the following intended benefits:

- To provide a fully digital signing experience to new sales agents, who can sign from any mobile device without having to install an application.
- Faster on-boarding of new professionals to the company, with minimal administrative load required.
- The streamlining of internal work processes, helping company representatives to be more efficient and dedicate less time to administrative tasks.
- Reduce the company carbon footprint by drastically cutting down paper consumption and courier costs.
- Digital archiving, search and retrieval of new sales contracts

In the following section, the resulting solution will be laid out and described in detail.

## 4. Solution

Vorwerk has more than 633,000 sales partners. In order to provide a fully digital signing experience to new sales agents, a new automated solution needed to be introduced.

The solution comprises of three software components:

Software	Description
<b>Signatureit</b>	Digital Contract Document and Signature Solution <ul style="list-style-type: none"> <li>• Provides a fully digital signing experience to the new sales agent, who can sign from any mobile device without having to install any application.</li> </ul>
<b>Universal Automation Center</b>	Workload Automation Platform <ul style="list-style-type: none"> <li>• Orchestrates the process between Signaturit and ImageMaster</li> <li>• Downloads signed documents and metadata in real-time</li> <li>• Archives the signed documents</li> <li>• Sends signed documents to ImageMaster</li> </ul>
<b>ImageMaster</b>	Enterprise Document Management System <ul style="list-style-type: none"> <li>• Archiving of new sales contracts and related metadata</li> <li>• Document search, retrieval via ImageMaster web client</li> <li>• Scan and load legacy documents (contracts, commissions, order, invoices, etc.) via the ImageMaster web client</li> </ul>

Table 1: Software Components

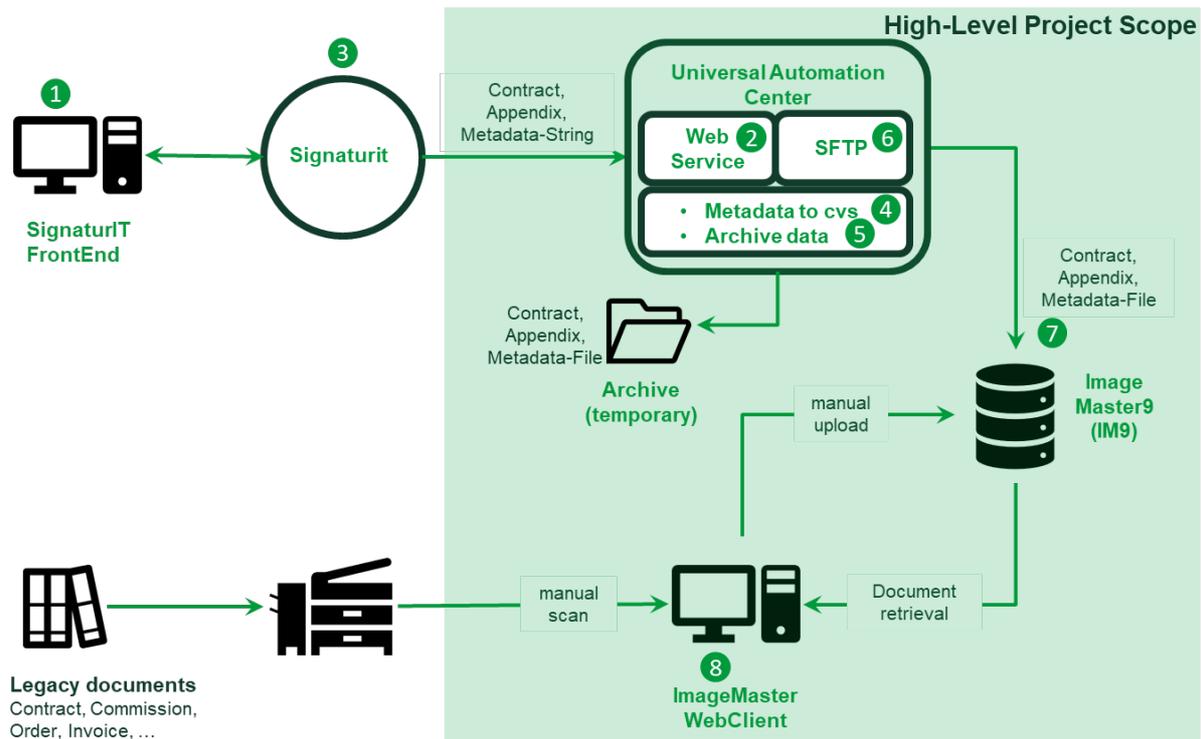


Figure 4: Process to Digitally Sign a New Sales Partner Contract

## DESCRIPTION OF PROCESSING STEPS

Step	Description
1	Sign a new sales contract via Signaturit app (tablet, mobile ...)
2	Universal Automation Center retrieves a webservice event for each new signed document
3	Universal Automation Center downloads in real-time any newly signed documents and related metadata from the Signaturit server
4	Universal Automation Center formats the document metadata
5	Universal Automation Center archives the signed documents for a configurable time
6	Universal Automation Center sends the signed documents and related metadata via sFTP to the Enterprise Content Management System ImageMaster
7	The documents and metadata are loaded to ImageMaster database
8	Document search, retrieval is provided via the ImageMaster web client

Table 2: Description of Processing Steps

**Note:** Legacy documents (contracts, commissions, orders, invoices, etc.) can still be scanned and loaded manually via the ImageMaster web client

## 4.1. Workflow for Signing a New Sales Contract via the Signaturit App

The figure below outlines the steps for digitally signing a new sales partner contract via the Signaturit app (tablet, mobile, etc.).

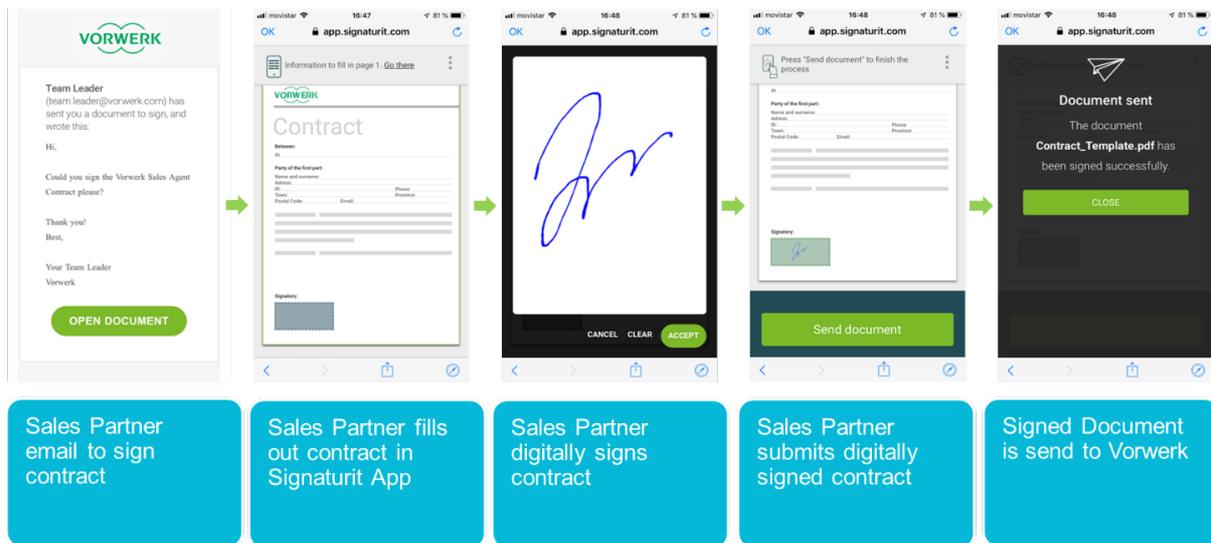


Figure 5: Process to Sign a New Sales Contract via the Signaturit App

## 4.2. Workflow to Orchestrate Digital Document Handling

Figure 4 below outlines the process for automatically downloading, formatting, archiving and transferring a new Sales partner contract from Signaturit towards ImageMaster using a Universal Controller workflow.

Once the documents are available in the ImageMaster database, it is possible to search and retrieve scanned documents using the ImageMaster web client.

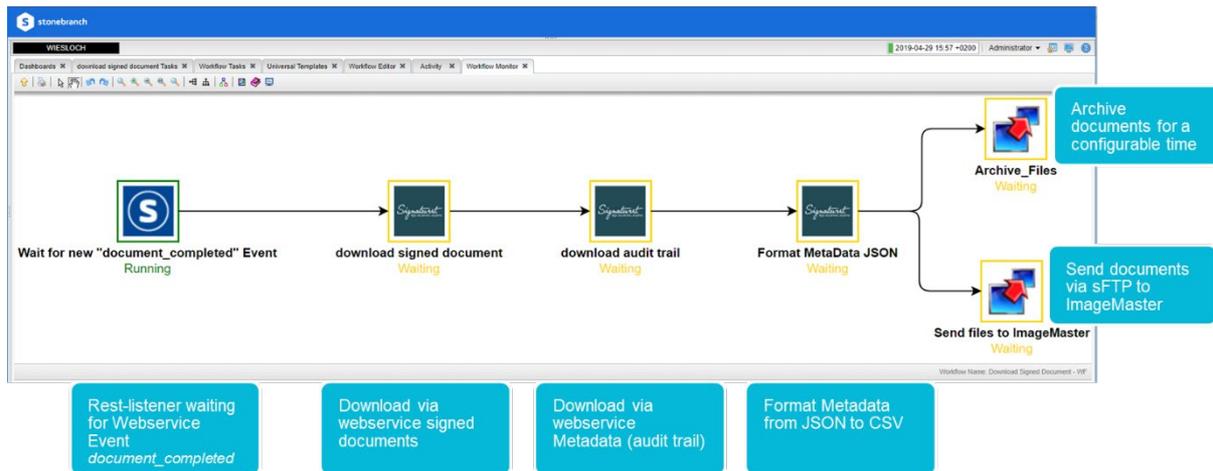


Figure 6: Universal Automation Center Workflow to Orchestrate the Digital Document Handling

### 4.3. Summary

The solution detailed above demonstrates a real example of how sales partner contracts can be electronically signed, archived and retrieved in a way that is fully digitalized and automatic.

### BENEFITS TO THE BUSINESS

- Vorwerk can now provide a fully digital signing experience to the new sales agents, who can sign documents from any mobile device without having to install an application.
- The speed of onboarding new professionals to the company has increased, with minimal administrative load.
- Internal work processes have been streamlined, helping Vorwerk sales professionals to be more efficient and to dedicate less time to administrative tasks.
- The company has reduced their carbon footprint by drastically cutting down on paper consumption and courier costs.
- The company has now established digital archiving, allowing for the easy search and retrieval of new sales contracts.
- The digital archiving practices now meet legal requirements by archiving the downloaded documents for a configurable length of time.

## RE-USABILITY OF THE SOLUTION

This particular solution is based on standard software components (Signaturit, Universal Automation Center and document management system ImageMaster), and can therefore be easily adjusted and configured to other similar use cases for which the following is process or processes are needed:

- The ability to digitally sign a contract via a mobile App (Signaturit app).
- The capability to download signed documents in real-time (Stonebranch Rest Listener Universal Task).
- Real-time document metadata formatting (Stonebranch Format Metadata Universal Task).
- Secure and audit-proof file transfers for documents (Stonebranch UDM sFTP Task).
- The archival of downloaded documents for a configurable length of time in order to meet legal requirements.
- The search and retrieval of documents using the web client of the document management system.

## 5. Participating Companies

Company	About
	<p>The Vorwerk &amp; Co. KG family enterprise was founded in 1883. The holding company's registered office is located in Wuppertal, Germany. At the head of the corporate group are the Managing Partners Reiner Strecker, Frank van Oers and Rainer Christian Genes. Vorwerk's core business encompasses both the production and sale of high-quality household products (Thermomix kitchen appliance, Kobold vacuum cleaner, Twercks tools, Temial Tea maker) and cosmetics (JAFRA Cosmetics). Here, Vorwerk always seeks direct contact with the customer – be it through direct selling, via its own e-shops or its Vorwerk stores in good inner-city locations. The Vorwerk family also includes the akf bank, Vorwerk flooring and its sister group, HECTAS. Worldwide there are more than 645,000 people working for Vorwerk, some 633,000 of whom are independent advisors. Vorwerk generated consolidated sales of 2.9 billion euros (2017) and operates in more than 70 countries. <a href="https://corporate.vorwerk.com/">https://corporate.vorwerk.com/</a></p>
	<p>Signaturit is a qualified trust service provider (QTSP) that offers innovative cloud-based solutions - electronic signatures (eSignatures), certified registered delivery (eDelivery) and electronic identification (eID) - to digitize and streamline any transaction between companies and individuals, securely and with full legal compliance. Signaturit has been granted with the EU trust mark, a logo awarded by the European Commission that ensures its services are qualified and comply with Regulation (EU) No 910/2014 (eIDAS). Founded in 2013 in Barcelona, Spain, Signaturit's contract management platform is available on a subscription basis or via API integration, and is already used by thousands of customers in more than 40 countries. <a href="https://www.signaturit.com">https://www.signaturit.com</a></p>
	<p>Stonebranch builds dynamic IT automation solutions that transform business IT environments from simple IT task automation into sophisticated, real-time business service automation, helping organizations achieve the highest possible Return on Automation. No matter the degree of automation, Stonebranch software is simple, modern and secure. Using its universal automation platform, enterprises can seamlessly orchestrate workloads and data across technology stacks and ecosystems. Headquartered in Atlanta, Georgia with points of contact and support throughout the Americas, Europe, and Asia, Stonebranch serves some of the world's largest financial, manufacturing, healthcare, travel, transportation, energy, and technology institutions. <a href="https://www.stonebranch.com/">https://www.stonebranch.com/</a></p>



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