

Client Case Studies

Marshall Wilson





Marshall Wilson

Enhanced Business Efficiency with Draycir Spindle Document Management

Marshall Wilson is a well-established business that provides a wide range of packaging supplies for its customers. Their commitment to excellent customer service and operational efficiency drives their continued success. Marshall Wilson sought to streamline document management and boost efficiency, so they turned to their business solutions provider, Pinnacle. After reviewing the viable options Pinnacle proposed and implemented the Draycir Spindle Document Management solution for Marshall Wilson's existing Sage 200 product.

The Challenge

Marshall Wilson's internal systems required a more efficient method for handling document distribution and management. They were facing frequent copy invoice requests from customers, which consumed significant time and resources. The need for a seamless and reliable solution became apparent to ensure their customers received accurate and timely documentation while allowing staff to focus on other critical tasks.

The Solution

Pinnacle proposed and implemented Draycir Spindle Document Management, a powerful and flexible tool designed to automate and simplify document distribution. The solution, developed by Draycir, integrates seamlessly with existing systems, enabling businesses to send documents such as invoices, statements and purchase orders directly from their accounting software. This modern approach to document management not only saves time but also reduces the potential for human error and offers significant long-term financial savings to the business.

Implementation Highlights

As part of the implementation, Pinnacle worked closely with Marshall Wilson to:

Installation

Install the new system in a timely and efficient manner, ensuring minimal disruption to daily operations.

Configuration

Configure a new printer and design a customised invoice layout to meet Marshall Wilson's specific needs, including the implementation of complex rules and logistical processes within the configuration of the Draycir system.

Training

Provide training and support to ensure staff could fully utilise the new system.



The Results

The implementation of Spindle Document Management delivered immediate and significant benefits for Marshall Wilson. According to Carol Bradshaw of Marshall Wilson:

// *We work with Pinnacle any time we have issues with our internal systems and always find them to be helpful with quick responses. Getting our new system installed in November and December 2024 with a new printer and new invoice layout was made easy and straightforward.*

Now our customers get copy invoices with their monthly statements, this has significantly reduced the amount of copy invoice requests we get, leaving more time for staff to do other jobs.



Carol Bradshaw
from Marshall Wilson

The reduction in copy invoice requests has allowed the team at Marshall Wilson to reallocate their time to more value-added tasks, improving overall productivity. The integration of copy invoices with monthly statements has also enhanced customer satisfaction, reducing administrative back-and-forth and ensuring prompt communication.

Marshall Wilson further highlighted the value of Pinnacle's ongoing support:

“ *Being able to just pick up the phone and let someone else take over your screen and fix your problem, sometimes on the spot, gives peace of mind that makes our job much easier at this end. Pinnacle have an understanding of our needs and therefore, we have a fantastic working relationship with them and would highly recommend them for anyone running a business, big or small.*

Draycir on the partnership with Pinnacle

Draycir is an award-winning leader in document management software for Sage, offering practical, cost-effective solutions that helps businesses to work smarter and more efficiently.

“ *Pinnacle are a fantastic long standing Business Partner of Draycir, and this case study is a brilliant example of how they have delivered efficiency savings and increased satisfaction for their customers through our partnership.*



Chris Hazeldine
Global Sales and Marketing Director,
Draycir.

Conclusion

Marshall Wilson's successful adoption Draycir Spindle Document Management highlights the importance of having the right technology and partner to support business goals.

Pinnacle's expertise and commitment to customer service ensured a smooth transition and long-term benefits for the client. With automated and efficient document management now in place, Marshall Wilson is well-positioned to continue providing outstanding service to their customers.

Want to find out more?

If your business is looking for ways to optimise document management and improve operational efficiency, Pinnacle can provide tailored solutions to meet your unique needs.

Learn more at:

www.pinnacle-online.com



Head Office

Pinnacle House, 153 Upper Newtownards Road,
Belfast, County Antrim, BT4 3HX

www.pinnacle-online.com hello@pinnacle-online.com 028 9067 4970