

Wellspring Software

Customer Success Case Study



Wellspring Software Transforms Document-heavy Processes from SugarCRM

At Wellspring Software, the desire to respond to our customers' needs has always directed the development of our product, PrintBoss. Since the first sale of PrintBoss in March 1990, we have improved the printing, emailing and archiving capabilities of organizations, for a variety of accounting documents, while complying with the most stringent security requirements.

Challenge

Wellspring Software's PrintBoss is a product that enables customers to print checks from multiple bank accounts onto a single blank check stock. It integrates with all major accounting systems to easily print checks from different bank accounts without needing pre-printed check stocks for every individual account.

The company sells both the software and the blank check stock. On an average day, Wellspring Software receives between 50 and 100 orders for blank check stock. Orders come in through a web shop, by email or phone, and are entered in SugarCRM, the organization's dedicated CRM platform.

Product

- Experlogix Document Automation

Benefits

- Increased efficiency
- Advanced functionalities
- Streamlined document processes

Tech

- SugarCRM

To fulfill daily orders, the Wellspring Software team had to go into every record's "Detail" view and generate the PDF versions of the ordered checks from there. They could then print them all at once from a Windows folder where they were automatically saved, but couldn't sort them in the right order. This manual process wasn't as efficient as Wellspring Software wanted it to be, with the team having to repeat the same tasks over and over again, and spend precious time sorting the print outputs. To save time and money, they decided to transform their order fulfillment process with Experlogix Document Automation for Sugar.

Solution

A New and Efficient Process

The Experlogix Document Automation solution seamlessly integrates with Sugar, allowing the Wellspring Software team to efficiently execute every step of the order fulfillment process from the CRM environment. Right from the "List" view of the day's orders, an employee can quickly generate the order document for each record; all documents are automatically merged into one big PDF file in the exact same order as they appear in the SugarCRM "List" view. The final document is then sent to the printer, with a single click from Experlogix Document Automation for SugarCRM.

Extending Benefits to Contract Renewals

Wellspring Software extended the use of Experlogix Document Automation's solution to their contract renewal process. Under the old process, team members created the required contract renewal documents with a reporting tool that wasn't fully integrated with SugarCRM. As a result, document generation capabilities were limited – functions such as emailing a document were not handled.

Starting from the Accounts module in Sugar, a Wellspring Software employee uses Experlogix Document Automation to easily create a highly personalized renewal contract that incorporates account fields and fields from related modules. The renewal contract template was previously designed with Experlogix Document Automation's Microsoft Word-based Template Builder, a tool that facilitates the creation of dynamic, data-driven and appealing document templates.

The generated contract document is automatically attached to an email and delivered to the appropriate customer. The entire process is optimized and automated – all it takes is just a few clicks within SugarCRM.



Result

The new order fulfillment and contract renewal processes increased efficiencies for Wellspring Software. Seamlessly integrated with SugarCRM, Experlogix Document Automation enabled the organization to create, generate, print and deliver their business-critical documents without ever leaving the CRM platform. Additional automated functionalities – merging multiple PDF documents, incorporating data from Sugar modules, sending documents to a local printer or by email – streamlined and accelerated the processes, saving Wellspring Software's employees hundreds of mouse clicks (and minutes) per day.

The team also found the Experlogix Document Automation solution very easy to use. When using the Experlogix Document Automation Template Builder, they were able to leverage their existing Microsoft Word skills to design a professional contract template, and easily add loops and complex conditions supported by clear and straightforward documentation.

Wellspring Software is now considering taking the transformation one step further with Experlogix Document Automation's integration with DocuSign to automate the e-signing process.



“Using Experlogix Document Automation in this process saves us about 45 minutes up to a full hour per day. It's been absolutely great working with Experlogix Document Automation for SugarCRM and we'll definitely broaden our use of the product as we continue to transform the way we interact with our customers.”

Graham Neale
Marketing Director

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