



**Spindle
Self Serve**

“It has reduced the time spent on the telephone by our customer service team.”

Adam Hemmings
General Manager
Dynamic Office Seating Ltd

Financial information at your fingertips

Spindle Self Serve integrates with Sage 200 to deliver real-time finance and accounting information to your staff and customers.

Branded with your company logo and colour scheme, Spindle Self Serve is a 24/7 secure online portal to allow 'self service' access to customer accounts and documents. With the ability to view sales order and invoice history, including outstanding invoices, your customers will have the required information at hand to pay you on time. In turn, this will reduce the time spent on resolving customer admin queries.

Internal staff can also benefit from Spindle Self Serve to view customer accounts and documents without the need to access Sage 200.

Reduce
incoming
phone calls
and emails

Improve
staff
productivity

24/7 secure
online access

Increase
customer
satisfaction

Benefits to your company:

Staff can view customer accounts without the need to access Sage 200, in or out of the office

Customised portal with your branding and colour schemes

Reduce time spent on customer admin queries

Real-time financial and accounting information

Staff can view current stock availability and place orders*

Promote your business with in-system pop-up messages*

Benefits for your customers:

24/7 online access to view their own account

Customer dashboard with account overview

View sales order status and invoice history in real time

Reprint or download PDF invoices, statements and other documents on demand**

Search for live stock availability*

Place orders online at any time*

Browser-based access across all devices.

*Available as additional modules.

**Spindle Document Management licences required.

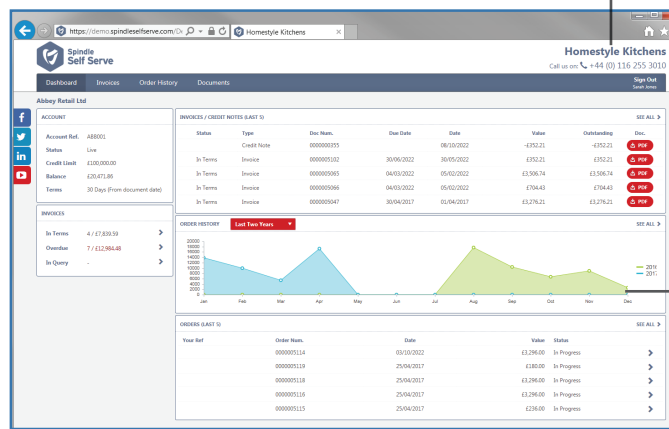
“Our customers have found it easy to navigate and very quick to find the status of an order.”

Lise Skeppstam
Finance Director
DKL Marketing Ltd

Spindle Self Serve has a range of exciting features to get you up and running with your online customer portal.

Clean & Simple Dashboard

With one place for everything, your customers can see a complete overview of their account including an account summary, most recent orders, invoices and credit history.

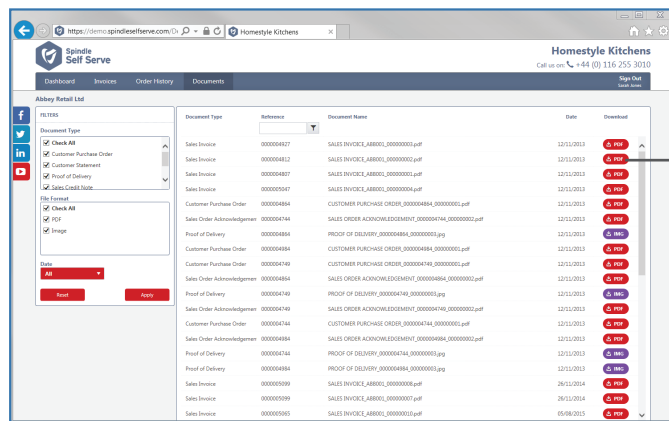


Your company, Your portal

By customising with your company branding, using your logo and colour schemes, you can assure your customers they are in the right place.

View Order History

Provides a view of all past orders on the history tab with real-time transactional data pulled through from Sage. The live order status indicates if the order is despatched, in progress or on hold.



View and Download Documents

Contains a complete document history of invoices, credit notes and statements. By linking with Spindle Document Management, you can download PDF copies* of the documents.

*Need Spindle Document Management to use the PDF download functionality.

For more information visit draycir.com/spindleselfserve

Ask about other modules available to help you optimise Spindle Self Serve and build a more powerful online portal to suit your business requirements.

Draycir's range of software solutions help businesses to work smarter.



For more information about our products, contact us on:

