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Case Study

Man and Machine Ltd: A finely tuned order to cash process

Founded in 1989, Man and Machine Ltd is a value added distributor based in Oxfordshire, UK, working exclusively within the digital design community. Their resellers benefit from a wide product portfolio including advanced CAD software and complementary hardware.

Man and Machine focus their energies on providing first class personal service, channel support and deep product knowledge to their resellers.

The challenge

With such a large channel to market, Man and Machine faced a number of challenges with their sales invoicing and ongoing credit control process. “It’s expensive to manually send out invoices, and then continually send out copy invoices on demand,” explains Debbie Tabrett, Man and Machine’s Credit Control Manager. Printing invoices, putting them in envelopes and then sending them on to the customer certainly wasn’t the best use of time. It stopped the efficiency of the day job.

Man and Machine was also continually hampered by issues with the postal system, where invoices could take up to a week to arrive. In some instances they weren’t getting through at all, and Tabrett goes on to say; “Quite often we wouldn’t know there was an issue until the customers received their statements.” With up to 400 invoices going out each day, the organisation couldn’t afford to lose invoices in the post, and recognised that improvements needed to be made.

With issues with the postal system, they knew they could no longer rely on the traditional methods of delivery, and a solution was needed fast. Electronic document delivery was the answer, but with up to 400 invoices a day, saving each one individually, sourcing the email address and then individually emailing them would just create another slow process.

About Zetadocs for NAV

The Zetadocs for NAV suite integrates with Microsoft Dynamics NAV to manage travel and business expenses, automate delivery of documents such as invoices or statements, and enable quick and easy document capture, storage and retrieval using Office 365 or network folder archives. This enables more efficient work practices, time and money savings, and better customer service offering.

Zetadocs for NAV has been created by Equisys. Our software products are designed for small and mid-market businesses, and for departmental use at multinational companies. They stand out from the competition by being simple to install and manage, reliable and great value – backed by outstanding service and support.

We have over 60,000 customers, in more than 100 countries. Equisys was founded in 1987 and has offices in London and Hull, UK and Atlanta, GA.

The Solution

Following advice from their incumbent partner, Man and Machine assessed Zetadocs from Equisys. "In short, Zetadocs appeared to address the issues for the credit control department head on," explains David Allwright, Man and Machine's Systems Analyst.

After assessing the alternatives, Man and Machine made the decision to move forward with Zetadocs, using it for every document and invoice they send to their customers. **"As Zetadocs is fully integrated with Microsoft Dynamics NAV, you don't need to open any other programs,"** explains Allwright. "Zetadocs goes through the same steps as if you were sending an email, with the added bonus of familiarity. The general setup for defining customers and email addresses is very straightforward."

Working with QuantiQ, Zetadocs templates were all pre-defined, aligned with all related email addresses and associated with the correct customer and invoicing process within the system. "For each invoice we send out, we can add our own personalisation. This only needs to be done once in Zetadocs, and then it's plain sailing all the way," highlights Tabrett. Every customer uses a standard template in the body of the email and copies are automatically indexed and archived.

When reflecting on the technology, Allwright goes on to say; "Zetadocs easily integrates with Microsoft Dynamics NAV intelligently, personalising addressing details, content and attachments. The two products really do sit alongside each other seamlessly"

The Benefits

"Each day we are saving at least 2 working hours with Zetadocs. This equates to 1 week in every month," highlights Tabrett. "I now have more time to chase the debts, sort out any finance issues and support the rest of the finance team." Rather than continually fire-fighting, Man and Machine is afforded more time to help move the business forward.

Without the expense of printing and sending documents, **Man and Machine's sales order processing and credit control is now far more efficient.** "We can easily identify the invoices that need to be sent, email them either individually or as a batch and keep on top of our customer accounts at all times," continues Tabrett.

Man and Machine really appreciate the benefit of the personalised templates. Tabrett goes on to say; "They really do give it that personal touch towards customer satisfaction. The great thing is they are intuitive and we only need to set them up once."

Improved customer satisfaction doesn't just stop there. "When a customer rings up with an enquiry," Tabrett continues, "it's very easy to administer and see where everything is. It is quick to identify any copy invoices and send them on." Man and Machine's customers enjoy the electronic versions, as it is all in one place, easy to print, and easy to document for the auditors.

"Zetadocs fits our organisation and Dynamics NAV, and benefits the company as a whole," concludes Tabrett. **"As well as making my life easier, we have reduced our delivery costs and fine tuned our order to cash process."**

QUANTIQ®

QUANTIQ is the only Microsoft Partner in the UK that has the ability to sell, implement and support environments in the cloud, hybrid cloud and on-premise, encompassing Dynamics 365, Business Central, AX, CRM, GP, NAV and Business Intelligence.

QUANTIQ create Dynamics systems of intelligence tailored to enhance business performance, drive growth, profitability and efficiency. QUANTIQ helps its clients unify the capabilities of CRM and ERP solutions to amalgamate their people, data and processes by breaking down the silos in their business to create value for their customers and maintain a competitive advantage.

For more information on QUANTIQ, please visit www.quantiq.com

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