

SMB success story

Wellspring Software Transforms Document-intensive Processes with XperiDo for Sugar

Wellspring Software is a leading vendor of check (cheque) printing software. They made it their key focus to build solutions that save people's time and money. XperiDo for Sugar helps Wellspring save their own people's time and money by transforming the order fulfilment and contract renewal processes.

Wellspring Software's flagship product is called PrintBoss. It's a solution to print checks from multiple bank accounts onto one blank check stock. It's a simple need, but it has been driving this Missouri-based vendor for a quarter-century now. The product integrates with all major accounting systems to easily print checks from different bank accounts without needing pre-printed check stocks for every individual account.

Daily Order Fulfilment

Wellspring sells the software to print the checks, but also the blank check stock. On an average day, the company receives between 50 and 100 orders for blank check stock. Orders come in through a web shop, by e-mail or phone, and are all entered in Sugar, Wellspring's CRM.

Right from the list view of the day's orders, XperiDo generates an order document for each record. It merges all the orders into one big PDF file in the exact same order as they appear on the Sugar list view and sends the document to the printer.

"Using XperiDo in this process saves us about 45 minutes up to a full hour per day", says Graham Neale, Marketing Director at Wellspring Software. "Before, we had to go into every record's detail view and generate the PDFs there. We could then print them all at once from a Windows folder they were saved into, but couldn't quite sort them in the right order."

"Honestly, I would say that on a good day, XperiDo saves us hundreds of mouse clicks and a lot of wasted time sorting our print output."

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Graham Neale, Marketing Director at Wellspring Software

Contract Renewals

Wellspring Software is currently extending their use of XperiDo to the contract renewal process. "We start our contract renewals from the Accounts Module in Sugar. XperiDo creates a renewal contract that merges account fields and fields from related modules into a great-looking contract template. And it delivers the generated document by e-mail to the relevant contact. All it takes from us is one click." To take the transformation one step further, Graham Neale also considers adopting XperiDo's integration with DocuSign to automate the signing process.

"We used to create these contract renewal documents with a reporting tool that wasn't really integrated with Sugar and couldn't handle e-mailing. XperiDo does all of that and does it right from within Sugar".

It's so easy it's almost humorous

Wellspring switched CRM systems and started to use Sugar in the fall of 2015. "Amidst the chaos that is typical of such a transition, it was awesome to have an add-on that paid-off immediately," Graham Neale states. "We were a bit reluctant to redo all of our document templates, but it turned out that the XperiDo template design plug-in for Microsoft Word makes it so easy to do loops, conditions, anything really. I'd say it's almost humorous. And whenever you try something that's a bit more complex, the documentation on the support site just walks you straight through it."

"It's been absolutely great working with XperiDo inside Sugar and we'll definitely broaden our use of both products as we continue to transform the way we interact with our customers," Graham Neale concludes. "XperiDo is reasonably priced, well-documented, does what it promises, and it's super easy to set up and use. From one vendor to another... this is really a tool that stands out."

PROJECT PROFILE

Company

Wellspring Software (www.printboss.com)

Technology

Sugar 7 & XperiDo for Sugar