



# Greentree Engineered Solutions

Greentree provides top quality precision masking and protection products and materials which are approved and used within industries such as aerospace, automotive, electronics, medical and metal finishing in the UK and worldwide.

📍 Tewkesbury, Gloucestershire 🌐 [www.greentree-shercon.co.uk](http://www.greentree-shercon.co.uk)  
Reseller: Pinnacle [www.pinnacle-online.com](http://www.pinnacle-online.com)



## The challenge

Greentree were ahead of the paper-free office game, with an electronic filing system already in place. This allowed them to scan customer purchase orders, manually rename the file to match the purchase order and save documents within a folder hierarchy on their server.

Greentree's existing electronic filing system made it easy to retrieve documents if the customer name and purchase order was known. However the system was not very efficient and there was no uniformity in naming conventions or filing systems. In addition, the storage of additional documents was inconsistent.

When the time came to upgrade from Sage 50 to Sage 200, the company took the opportunity to find a more robust order system for storing their customer purchase orders.

## The solution

With its integration with Sage 200, Spindle Document Capture was chosen as the ideal solution to enable Greentree to capture, archive and view documents within their ERP system.

The advantages of Spindle Document Capture over their previous system were that it provided the desired uniformity, reliability and expansion capabilities that the business required to continue its growth.

Tom Rawlinson, Sales & Operations Support Manager at Greentree explains how Spindle Document Capture has benefited the business:

"By capturing data, storing it against sales orders and tagging it independently, our documents have become far easier for all members of staff to find. Spindle Document Capture has also allowed us to capture additional documents that we previously haven't had a method of storing."

## The results

Documents are much **easier to find**

**Additional documents captured** that previously had no way of storing

Easier to **maintain digital archives**

**Better access** to electronic files from other office locations

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Tom Rawlinson, Sales & Operations Support Manager, Greentree

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