



### BUSINESS CHALLENGE

To reduce payment delays, improve cash flow, and speed up the resolution of invoice-related inquiries, a leading specialist distributor of plumbing and heating products sought to streamline and modernize its systems for invoicing and customer statements. And critically, there was a need for a secure and compliant system for access and control of data and documents – in accordance with GDPR requirements.

### TRANSFORMATION

The Columbus enterprise information management system from Macro 4 was selected to meet the company's growing business requirements. Over time this expanding organization has extended its use of Columbus to the point where it is now a strategic business solution for the company.

### BUSINESS BENEFITS

#### Faster invoice payments

leading to a significant reduction in debtor days and aged debt

#### Higher service levels

and enhanced customer communications, with automated email distribution of 4,000 customer statements per month

#### Greater accuracy

in claiming volume discounts from suppliers – worth approximately £13 million per month

#### Support for GDPR compliance

through retirement of a legacy document management system

## A leading distributor to the building trade

### Achieving faster payments, increased customer satisfaction and GDPR compliance with Columbus

As a leading plumbing, heating and cooling trade specialist merchant in the UK, the company puts customer service and the ability to offer excellent specialist knowledge high on its list of priorities.

The organization has grown significantly over the years and its ongoing strategy is to drive down costs, improve customer communications, and reduce business risk.

With state-of-the-art warehousing, and a supply chain that has the customer at its heart, the company recognized the need to increase investment in information technology to support its dynamic and expanding business. When the need arose to modernize and automate its credit management processes to meet increased demand, the company turned to Macro 4 for help.



**“Over the years our overall operations have doubled in size several times and we’ve extended our use of Columbus to the point that it now offers us a platinum service, supporting many of our strategic business processes. This extends to our staff and management across the enterprise as well as our customers.”**

## ENABLING FASTER INVOICE PAYMENTS AND IMPROVING SERVICE LEVELS

“We were looking to speed up invoice payment times, and with the introduction of the Columbus system, we have seen a significant reduction in debtor days and aged debt. We issue something like 750,000 invoices per month and now our collections team can resolve invoice-related inquiries in just minutes, with instant on-screen access to customer documentation. Increasing our efficiency inevitably leads to happier customers and staff, and fewer payment delays,” said the distributor’s IT Solutions Manager.

Columbus also provides customer self-service access through the company’s web portal. “Our customers can view their current and historical financial information, and opt to receive their monthly statements by email. This is all managed online by Columbus, freeing up our customer service staff.”

Summarizing the positive impact on its finance team, the IT Solutions Manager said, “Our operations have doubled in size several times over the years, yet with Columbus we’ve been able to absorb the extra workload without significantly increasing the headcount in our collections team.”

## DRIVING DOWN COSTS

Prior to the implementation of the Columbus system, around 4,000 customer statements were printed each month and sent to customers by post, which was both costly and time consuming. The monthly invoice run alone would have stretched to a mile of paper if every document had been laid out end to end. Moving away from paper, with more than 160 million documents now stored electronically within Columbus, has generated significant cost savings.

“With the huge volume of customer transactions we have each month, Columbus is flexible and scalable to help us meet these storage requirements. What’s more, we’re saving in the region of £50,000 a year in print, paper and postage costs now that we issue our customer statements by email.”



## ENSURING ACCURATE DISCOUNTS CLAIMED

When supplying major construction projects, the company's commercial finance team negotiates hefty volume discounts from their suppliers on bulk product orders. These discounts amount to around £13 million per month so any delay in claiming discounts or renegotiating contracts with suppliers can have a significant impact on their bottom line.

It's crucial that all documentation is accurately recorded, securely stored, and easily retrieved and with Columbus this whole process has been streamlined. Columbus also provides critical business management information, enabling the company to be far more proactive in its renegotiation and extension of supplier contracts.



## ACHIEVING GDPR COMPLIANCE

Following the introduction of the GDPR in May 2018, there was a requirement to move data out of an old document management system, including customer account applications, correspondence, and accounts payable invoices. It took just a matter of days to configure the new system within Columbus and then a couple of weeks to transfer over the millions of documents that had been stored in the old non-GDPR compliant system – which was then retired.

Columbus now also provides secure, easily accessible GDPR compliant storage for the company's employee information from multiple locations around the business – everything from employment contracts, pension and benefits details to attendance records.

Business rules are used to control the retention periods for all data stored by Columbus to comply with the GDPR. Personal information that should no longer be retained under the rules – such as information about ex-employees or closed customer accounts – can be deleted automatically, or on request.



**“It was easy to move the data into Columbus, where we have much greater levels of security around personal data. For example, all data is encrypted, and we can simply tailor how we restrict access to sensitive information because Columbus provides integration with Microsoft Active Directory.”**



## NOW AND INTO THE FUTURE

Following initial system set-up and training, the company's IT team has been able to implement many new Columbus applications without the need for additional help.

"With the excellent training, support and advice we've had from Macro 4 we really have now become self-sufficient," said the company's IT Solutions Manager.

Columbus has proven itself robust and flexible enough to handle the demands of this fast-moving, 24/7 business operation as it has grown over the years. Regular meetings with Macro 4's account management team also provides the opportunity to give feedback on new product features and input into future product development.

"Macro 4 is continually adding new capabilities to Columbus and this gives us the confidence that we've chosen the right strategic solution for our business as we continue to grow."



### SOLUTION COMPONENTS

- ▶ Columbus DW
- ▶ Columbus DoXite

### THE NEXT STEP

Read about other companies who have used Macro 4 software solutions to transform their organizations [www.macro4.com/resources](http://www.macro4.com/resources) or contact us to find out more.

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