

# CASE STUDY

Secure and time-saving solutions for generating and processing multiple documents



## At-a-glance

**Customer:** Blanchard and Company, Inc.

**Website:** [www.nebraskalink.com](http://www.nebraskalink.com)

**Customer Size:** 85+ employees

**Country:** New Orleans, Dallas,

**Industry:** Ownes and sells greatest U.S. Coins

## ABOUT

For over four decades, Blanchard and Company, Inc. have been an unrivalled expert in selecting rare coins. The company is renowned for its unwavering commitment to each customer and its adherence to the highest standards in numismatics. They meticulously select the finest coins for their clients.

## CHALLENGE

Blanchard faced numerous challenges, including merging data from several related entities simultaneously and reorganizing the order and shipping confirmation processes without making major changes to the existing CRM.

## SOLUTION

Blanchard was looking for a simple solution to integrate with their existing system without making many changes. Since the installation of DocumentsCorePack, handling critical business communication has become a piece of cake, while maintaining the same level of security.

### 01 ► Secure documentation process

DocumentsCorePack enables the seamless combination of various business documents into a single document. It helped them to handle several critical business communications and document management tasks. This feature ensures that sensitive customer data remains protected throughout the document-handling process. As a result, businesses can confidently manage and share documents without compromising data security.

## 02▶ Automated business communication



Blanchard automated their documentation process, enabling them to streamline the order confirmation to the shipping confirmation process. By doing so, they integrated all their critical business communications into one solution. DocumentsCorePack facilitated the seamless transfer of their order process without any complications. This approach allowed the team to generate error-free documents without any compromise.

## 03▶ Time-Saving documentation



DocumentsCorePack significantly streamlined their document creation and generation process. By utilizing the template designer, they automated the creation of documents. This automation not only saved time but also ensured consistency and accuracy. The user-friendly features of DocumentsCorePack made it easy for the team to adapt, allowing them to quickly integrate the tool into their workflow without any significant learning curve. Overall, the efficiency and simplicity of DocumentsCorePack greatly enhanced their productivity and operational effectiveness.



## CONCLUSION

In conclusion, Blanchard and Company effectively integrated solutions from mscrm-addons. Their main goal of reorganizing the order and shipping confirmation processes, without changing their existing process was achieved with DocumentsCorePack, and the results were delivered as required.

**Are you ready to revolutionize the way you handle your documents too?**



**START YOUR 14-DAYS FREE TRIAL!**

All features and support included

“ Blanchard and Company, Inc. is leveraging the mscrm-addons DocumentsCorePack and AutoMerge Addons to handle several critical business communications and document management tasks. The products ability to merge data from several related entities at once is the key feature in our selection to utilize it in our order confirmation and shipping confirmation processes. We at Blanchard are very pleased with the product and would highly recommend mscrm-addons products to anyone looking for a robust yet flexible document merge and delivery solution. mscrm-addons has provided top notch assistance with initial setup and better than expected support since the original install. ”

**Ed Glover,** Blanchard Company, Inc.