



**Spindle
Self Serve**



Financial information at your fingertips

"It has reduced the time spent on the phone by our customer service team."

Adam Hemmings
General Manager
Dynamic Office Seating Ltd

Spindle Self Serve integrates with Sage 200 to deliver real-time finance and accounting information to your staff and customers.

Branded with your company logo and colour scheme, Spindle Self Serve is a 24/7 secure online portal to allow 'self service' access to customer accounts and documents. With the ability to view sales order and invoice history, including outstanding invoices, your customers will have the required information at hand to pay you on time. In turn, this will reduce the time spent on resolving customer admin queries.

Internal staff can also benefit from Spindle Self Serve to view customer accounts and documents without the need to access Sage 200.

Benefits to your company:

View customer accounts with the need to access Sage 200

Customised branded portal

Reduce time spent on customer admin queries

Access real-time information

Real-time stock availability and orders

Business promotion in-system

Benefits for your customers:

24/7 online access

Customer dashboard

Real-time order status and invoices

Access invoice statements and other documents*

Live stock availability view

Place orders at any time

Access anywhere, anytime on any device



*Spindle Document Management licences required.

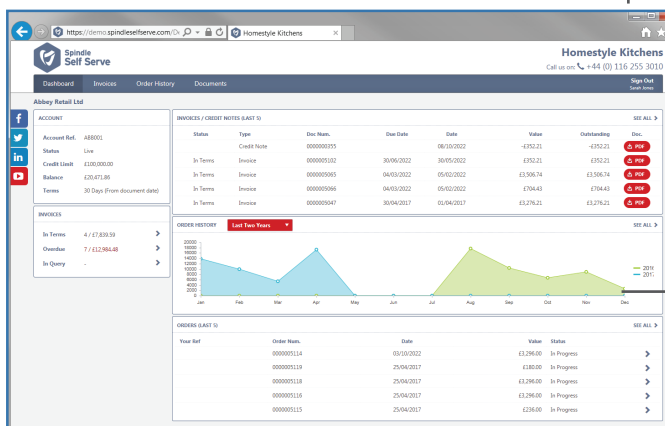
"Our customers have found it easy to navigate and very quick to find the status of an order."

Lise Skeppstam
Finance Director
DKL Marketing Ltd

Spindle Self Serve has a range of exciting features to get you up and running with your online customer portal.

Clean & Simple Dashboard

Clean and simple dashboard. With one place for everything, your customers can see a complete overview of their account.



Your company, Your portal

Your company, your portal. Customise with your company branding, reassuring your customers they are in the right place.

View Order History

View order history. View your order history and current order status with real-time data pulled through from Sage.

The 'Documents' tab shows a list of documents:

Document Type	Reference	Document Name	Date	Download
Sales Invoice	0000004827	SALES INVOICE_A88001_0000000002.pdf	12/11/2023	PDF
Sales Invoice	0000004822	SALES INVOICE_A88001_0000000002.pdf	12/11/2023	PDF
Sales Invoice	0000004807	SALES INVOICE_A88001_0000000002.pdf	12/11/2023	PDF
Sales Invoice	0000005047	SALES INVOICE_A88001_0000000004.pdf	12/11/2023	PDF
Customer Purchase Order	0000004884	CUSTOMER PURCHASE ORDER_0000004884_0000000001.pdf	12/11/2023	PDF
Sales Order Acknowledgement	0000004744	SALES ORDER ACKNOWLEDGEMENT_0000004744_0000000002.pdf	12/11/2023	PDF
Proof of Delivery	0000004884	PROOF OF DELIVERY_0000004884_0000000001.jpg	12/11/2023	PDF
Customer Purchase Order	0000004884	CUSTOMER PURCHASE ORDER_0000004884_0000000001.pdf	12/11/2023	PDF
Customer Purchase Order	0000004749	CUSTOMER PURCHASE ORDER_0000004749_0000000001.pdf	12/11/2023	PDF
Sales Order Acknowledgement	0000004884	SALES ORDER ACKNOWLEDGEMENT_0000004884_0000000002.pdf	12/11/2023	PDF
Proof of Delivery	0000004749	PROOF OF DELIVERY_0000004749_0000000001.jpg	12/11/2023	PDF
Sales Order Acknowledgement	0000004749	SALES ORDER ACKNOWLEDGEMENT_0000004749_0000000002.pdf	12/11/2023	PDF
Customer Purchase Order	0000004744	CUSTOMER PURCHASE ORDER_0000004744_0000000001.pdf	12/11/2023	PDF
Sales Order Acknowledgement	0000004884	SALES ORDER ACKNOWLEDGEMENT_0000004884_0000000002.pdf	12/11/2023	PDF
Proof of Delivery	0000004744	PROOF OF DELIVERY_0000004744_0000000001.jpg	12/11/2023	PDF
Proof of Delivery	0000004884	PROOF OF DELIVERY_0000004884_0000000001.jpg	12/11/2023	PDF
Sales Invoice	0000005099	SALES INVOICE_A88001_0000000008.pdf	26/11/2024	PDF
Sales Invoice	0000005099	SALES INVOICE_A88001_0000000007.pdf	26/11/2024	PDF
Sales Invoice	0000005095	SALES INVOICE_A88001_0000000003.pdf	05/08/2025	PDF

View and Download Documents

View and download documents. Access your complete document history of invoices, credit notes and statements. When linked with Spindle Document Management you can download copies of the documents

*Need Spindle Document Management to use the PDF download functionality.



Watch a demo:

[Click here!](#)

Enable all colleagues to access Sage data anywhere, anytime

Spindle Self Serve allows you to extend access to Sage 200 data beyond the Accounts Department.

As a cost-effective solution for non Sage users, Spindle Self Serve provides remote access to Sage 200 data through an easy to use and fast to deploy online portal.

Your colleagues can remotely access customer accounts in real-time. In addition, you can provide access to your customers to view their own financial account information, download documents and much more.

Benefits for your colleagues:

Access customer accounts anywhere, anytime on any device

Dashboard view of customer account

Highlight overdue invoices

View customer orders and status

Instantly submit orders and quotes into Sage

Real-time view of stock status.



Place Order

Access real-time finance and accounting information securely with Spindle Self Serve and Sage 200.

The **Order Module** gives you and your customers all the benefits of a secure online ordering system. Your customers can place orders 24/7 at their own convenience, helping to improve your levels of customer service. With online orders directly inputted into Sage 200, it will save administration time on entering orders into the system.

'Customers can place orders without needing to contact us.'

Dave Warren

Managing Director MANN + HUMMEL

The screenshot shows the Spindle Self Serve web application interface for Homestyle Kitchens. The interface is designed for customers to place orders online. It features a navigation bar with options like Dashboard, Invoices, Order History, Place Order (highlighted), Stock, and Documents. The main content area is divided into sections for product selection and order management. On the left, there's a search bar and a list of products with columns for Code, Description, Unit, and Qty. On the right, there's a sidebar with sections for ORDER (including a 'Place Order' button), DETAILS (with fields for 'Your Ref.' and 'Date Required'), DELIVERY (with fields for Name, Address, City, County, Postcode, Country, and Tel), and DELIVERY INSTRUCTIONS (with a 'Bulk Upload' button).

Benefits to your customers

Speed up ordering processes

- Place new and repeat orders 24/7
- Create quotes anywhere anytime
- Search for available products
- Check your order to view the live status
- Message directly about your orders
- View order documents*
- Use in conjunction with Stock View

Benefits for your company

Easily receive online orders

- Reduce the number of communications from customers
- Online orders go directly into Sage 200
- Control which items are available
- Place customer orders anywhere, anytime
- View customer order documents*
- Easily respond to customers with real-time information

Internal Stock View

Spindle Self Serve integrates with Sage 200 to bring real-time finance and accounting information via a secure online portal.



The **Internal Stock** module gives access for your staff to check stock levels, prices and specifications without the need to use Sage. With direct access to stock information, sales and customer service departments can quickly respond to customer enquiries.

Staff can directly view stock levels without accessing Sage

● Check stock levels on behalf of customer, during a phone call or on-site.

● Use in conjunction with the 'Place Order' module.*

● Search for products by product name or code

SKU	Name	Free Stock	Unit	Type	Product Group	Docs.	Allow Sales
CA/BASE/SNG/BEECH	Beech Base Single Cabinet H58cm	100.00	Each	Stock	Cabinets	(1)	✓
CA/BASE/DBL/BEECH	Beech Base Double Cabinet H58cm	90.00	Each	Stock	Cabinets	(2)	✓
CA/WALL/H70/BEECH	Beech Wall Cabinet H70cm	110.00	Each	Stock	Cabinets		✓
CA/WALL/H92/BEECH	Beech Wall Cabinet H92cm	96.00	Each	Stock	Cabinets		✓
CA/BASE/SNG/OAK	Oak Base Single Cabinet H58cm	99.00	Each	Stock	Cabinets		✓
CA/BASE/DBL/OAK	Oak Base Double Cabinet H58cm	100.00	Each	Stock	Cabinets		✓
CA/WALL/H70/OAK	Oak Wall Cabinet H70cm	96.00	Each	Stock	Cabinets		✓
CA/WALL/H92/OAK	Oak Wall Cabinet H92cm	102.00	Each	Stock	Cabinets		✓
WT/WHITE/LAM/60	White Laminated Worktop 60cm L	9.00	Each	Stock	Worktops Finished		✓
WT/WHITE/LAM/120	White Laminated Worktop 120cm L	19.00	Each	Stock	Worktops Finished		✓
WT/GREY/LAM/60	Marble Grey Laminated Worktop 60cm L	2.00	Each	Stock	Worktops Finished		✓
BS/ARIZONA/BOM	Arizona Kitchen	-6.00	Each	Stock	Bespoke Kitchens		✓
PROMO/CAT/SUMMI	Welcome to the Sun Catalogue	0.00	Each	Stock	Promotional Material		✓
PANEL/SIDE/51X60	Side Panel for base unit w51cm X h	143.00	Each	Stock	Wood Panels		✓
PANEL/WALL/51X70	Wall Panel w51cm X h70cm	102.00	Each	Stock	Wood Panels		✓
PANEL/WALL/51X92	Wall Panel w51cm X h92cm	129.00	Each	Stock	Wood Panels		✓
IR/HINGE	Hinge	53.00	100 Pack	Stock	Ironmongery		✓
PANEL/BASE/DBL/51	Base Panel Dbl 51cm X 96cm	142.00	Each	Stock	Wood Panels		✓
PA/SHELF/DBL/45X96	Shelf Dblw 45cm X 96cm	135.00	Each	Stock	Wood Panels		✓
PA/SHELF/SNG/45X57	Shelf Single 45cm X 57cm	124.00	Each	Stock	Wood Panels		✓

● Improve the customer experience for external users:

- Upload product images
- Edit product dimensions
- Add alternate codes



External Stock View

Spindle Self Serve integrates with Sage 200 to bring real-time finance and accounting information via a secure online portal.

The **External Stock** module allows your customers to easily check stock levels before they place an order, whether by phone, email or online using the Order module. The convenience of on-demand access to live stock information, pricing and specifications can, in turn, help your customers improve service levels to their own clients.

Let customers check stock levels at any time

Search for products by product name or code.

Use in conjunction with the 'Place Order' module.*

View related documents such as datasheets, certificates of conformity etc.**

SKU	Name	Free Stock	Unit	Product Group	Docs
CA/BASE/SNG/BEECH	Beech Base Single Cabinet H58cm	5.00	Each	Cabinets	(1)
CA/BASE/DBL/BEECH	Beech Base Double Cabinet H58cm	0.00	Each	Cabinets	(2)
CA/WALL/H70/BEECH	Beech Wall Cabinet H70cm	10.00	Each	Cabinets	
CA/WALL/H92/BEECH	Beech Wall Cabinet H92cm	5.00	Each	Cabinets	
CA/BASE/SNG/OAK	Oak Base Single Cabinet H58cm	5.00	Each	Cabinets	
CA/BASE/DBL/OAK	Oak Base Double Cabinet H58cm	0.00	Each	Cabinets	
CA/WALL/H70/OAK	Oak Wall Cabinet H70cm	0.00	Each	Cabinets	
CA/WALL/H92/OAK	Oak Wall Cabinet H92cm	2.00	Each	Cabinets	
TILE/WHIT/10x10	Tiles White 10cm x 10cm	5.00	100 Pack	Tiles	
TILE/COL/10x10	Tiles Coloured 10cm x 10cm	0.00	100 Pack	Tiles	
TILE/WHIT/20x20	Tiles White 20cm x 20cm	0.00	100 Pack	Tiles	
WW/FRIGDE/289/WHIT	Fridge Freezer White 289 Litre	0.00	Each	Whiteware	
WW/FRIGDE/265/RET	Fridge Freezer Retro 265 Litre	8.00	Each	Whiteware	
WW/WASH/1600	Washing Machine 1600 spin	0.00	Each	Whiteware	
WW/WASHDRY/1200	Washer Dryer 1200 spin	8.00	Each	Whiteware	
COOK/FAN-OVEN	Built In Fan Oven	0.00	Each	Cookers - Ovens	
COOK/CERM/HOB	Ceramic 4 Plate Hob	2.00	Each	Cookers - Ovens	
ACS/TOASTER	Polished Steel 4 Slice Toaster	87.00	Each	Accessories	
ACS/BLENDER	Professional Blender 5 Speed	110.00	Each	Accessories	
ACS/MIXER	Professional Mixer 3 Speed	83.00	Each	Accessories	
ACS/MEAT-SLICER	Commercial Meat Slicer	95.00	Each	Accessories	

View accompanying product images.

Check stock levels before placing an order and see alternatives if item not available.

*Spindle Document Management licences required.

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