

Case Study



AAB, reveals how Orbis is changing the way his company does business.

Leading UK based company implements Orbis to automate a number of manual processes, helping to reduce costs by between 25% to 35% and provide information visibility to customer and business partners

Customer Profile

Name	Anderson Anderson & Brown
Country	Scotland
Industry	Chartered Accountants
Employees	80
Web address	www.aab.co.uk

Reseller Profile

Name	IT Too Limited
Contact	Alec Harcus
Web Address	www.it-too.co.uk

Background

Anderson Anderson & Brown invested in a new Practice Management/CRM system written in Microsoft SQL. This firm also have another database which holds client-centric data for the accounts production and taxation software. Some common data is held in both systems such as client code and name. The firm uses MS Exchange and Outlook to manage its communications.

Requirements

With the investment made in the new Practice Management/CRM system, it was crucial that the information input be accurate and complete.

A system was required that would automatically validate daily timesheet postings and advise the relevant staff via email of errors or omissions.

Key information relating to new contacts and clients is not always available on initial input to the database so the firm needed a way to automatically check on a periodic basis for "gaps" in the data.

Changes to the key static data held in both of the main databases had to be checked to ensure that they were in sync and discrepancies highlighted.

Staff with handheld PDA's were also keen to download a complete listing of all their contacts and clients for use out of the office.

Solution

Orbis Software provided the features required to enable automation of each of these processes, minimising manual intervention and creating operating efficiencies in database management.

Setting up Orbis did not require any changes to be made to existing systems before it could be utilised. It integrated seamlessly with MS Exchange and Outlook and utilised the underlying database queries already created during the set-up of the firms' databases.

Staff would see the benefit of Orbis on a daily basis without requiring any training on how to use it.

Implementation

Orbis provides two main areas of functionality, Alerts and Profiles.

Alerts were used to check for predefined conditions and send email "alerts" to the relevant staff when these conditions existed.

Alerts were used to check that staff had used the correct charge rates on their timesheets and that time had been coded to the proper cost centre following predefined policies set out by the firm.

Alerts were also used to let the database administrator know when key contact information was incomplete or where inconsistencies in the data were apparent. Examples of this included checks for the completeness of contact details such as name, initials, title, address, phone/fax/mobile numbers and e-mail address and ensuring that staff allocations were made when a new client was set-up. Any changes to one database also needed to be reflected in the other database and alerts were used to highlight discrepancies in client code and staff allocation changes between the two.

Profiles were used to publish all the client and contact database details into a public folder on the MS Exchange Server. Staff could then pick up client/contact email addresses within MS Outlook without having to access the Practice Management/CRM

system. Staff with PDA's could also synchronise to this folder and download these contacts for use out of the office.

"Anderson Anderson and Brown depend on the accuracy and completeness of their key data for the effective and efficient running of their business. Orbis has provided us with the tools and information to achieve this in a very efficient manner without disruption to our staff or existing systems."

Alec Harcus
Senior Manager