

Customer case studies

Fluidata

Fluidata pioneers innovative, high speed internet services that provide its clients with the ultimate network solution. The company creates bespoke packages with increased flexibility that directly target the needs of each individual client. Fluidata has expanded rapidly over the past few years and is poised to grow further over the next few years.

“Everyone in the business is very much aware of profits and recurring revenue – the things we need to maintain our business and forward growth.”

Piers Daniell
Managing Director



The challenge

“From very early on, we wanted to standardise how our company operated and what software we used,” says Piers Daniell, managing director for Fluidata. “We decided we needed one piece of software that would manage most of our business and would save us from having issues with billing, customer data and service.”

As Piers explains, “At the time, we were using Sage Line 50 to process a modest number of transactions. We were still establishing the business.”

The solution

After researching a couple of software providers, the company chose Access. Fluidata selected Dimensions for its strong finance functionality and Service Manager for its detailed analysis of products and services.

Since 2006, Fluidata has continued to configure its Access solution to meet its growing business needs.

The results

“Access Dimensions drives our business. And having the CRM module accompany the finance software works because it’s good to be finance focused,” says Piers. “Everyone in the business is very much aware of profits and recurring revenue – the things we need to maintain our business and forward growth.”

Technology enhances business Fluidata customised Service Manager to provide details for each service it delivers to customers. Internet connectivity services became products in their own right, and the company created packages to market the products.

Industry Professional services - technology

Geographic London and Hemel Hempstead

Employees 42

Turnover £7.2m

Solution Access Dimensions
Service Manager
SelectPay
SelectHR
Access Document Management

Modules CRM
SOP & Invoicing
POP
Stock Control
Transaction Broker
SDK
Access Office Integration,
Credit Control
Dashboard
Albany E-Pay
Access Task Centre



Using the link items feature in Dimensions, the company assigned stock codes for the products which are automatically fed through to Service Manager.

“We use the fields within Service Manager against each stock code and product that is sold to capture customer details,” he says. “The software allows us to record a huge amount of information on each customer.”

Rollout recurring billing

Before implementing its Access solution, the business used spreadsheets for billing. Access customised Service Manager to do the work specifically for Fluidata. The software automatically updates Dimensions with who's getting billed each month, says Piers.

“We've been using BACs for three years, and we recently added Albany E-Pay to give us a fully electronic BACs system,” he says. “This gives us full integration into Dimensions, which automatically posts payments and saves us time.”

Reduces paper usage

Happy with its recurring billing, Fluidata looked to automate other business activities. The company implemented Document Management in 2010, and changed the way it processed paperwork.

“Now, paperwork is bar coded and scanned into Dimensions. We don't need to really fuss with paper, and we don't have to provide storage for files,” says Piers. “In a transaction, you can look at the original invoice straightaway without having to search through a file. Also because we store the scanned documents on our own hosted cloud environment we no longer have to keep original hard copies.”

Boosts productivity

Fluidata's PCs, desktops and servers are virtual; it runs everything from a private cloud environment. Proving that iPads can be used a business tool, the company enabled the tablets to work remotely to operate the Windows platform.

“We run a 3G network, which means people can use the Access software when away from their desks. They have all the functionality they would with a laptop,” he says. “It's much easier using an iPad, and people are more likely to have it with them. We can be productive even when we're away from our desks.”

Integrates HR and payroll

Prior to 2011, the company was outsourcing its HR and used an older version of Access Payroll. Fluidata was working towards its Bronze Investors In People Award and wanted to integrate its HR and payroll.

“As part of the award's criteria, we needed to record our training and development with staff,” says Piers. “At the time, the other features within SelectHR were a bonus rather than a requirement. Now we use Self-service, and everyone manages their own holidays.”

Before, employees submitted their holiday requests to the accounts team, who were manually recording them. This left the door open for human error says Piers, and it created extra paperwork.

“Previously, we would find that the wrong people were authorising the holiday. Now everything is fed through to SelectPay,” he says. “The software helps us ensure employees get consistent relationships with the business, and that we look after people the right way,” he says.

The future

Fluidata has plans to use its Dashboard functionality to analyse the business. “Automating our expenses with FocalPoint is a longer-term goal,” say Piers.

Summary

Fluidata wanted to solidify its business without investing in multiple software platforms. By selecting an Access solution, the company gained a scalable system that continues to grow with the company.

“It's been a good decision for us. It's helped professionalise our business,” says Piers. “We've minimised the pieces of software we've had to manage and use, which makes us more efficient.”

Who we are

Access UK is a specialist software developer and consultancy business. Developed here in the UK and supported locally, our aim is to cut through complexity and increase efficiency for your business.

Multi-award-winning, Access offers solutions for accounting and finance, manufacturing and distribution, professional services automation, HR, payroll, service management and CRM.

Further information

For further information on this, or any other Access case studies, please telephone us on 01206 322 575, email case-studies@theaccessgroup.com or, alternatively, visit www.theaccessgroup.com/downloads/case-studies.aspx