

Customer case studies

Copy IT Digital Solutions Ltd

Formed in 2001, Copy IT Digital Solutions Ltd is one of the largest and longest established independent photocopier dealerships servicing East Anglia. They have a Head Office in Norwich and offices in Cambridge and Ipswich. Customers include Greene King, Port of Felixstowe and May Gurney.

“It has revolutionised the way we work. I am confident that it will continue to provide impressive returns on investment for us.”

Stephen Tate
Company Secretary & Accountant



As a leading player within the photocopier industry, Copy IT faces many challenges. With technology changing constantly, the focus is always on keeping costs down, providing excellent customer service, and at the same time differentiating themselves from their competitors. As a business, they sell and service photocopiers, printers and fax machines. They have 11 Service Technicians with jobs being allocated appropriately according to skill sets and locations.

Selecting a new system

Back in June 2005, Copy IT was running a Microsoft Access-based solution for their accounts, stock and service. They were experiencing issues with speed and reporting and were also unhappy with the support service they were receiving from their reseller.

These problems led them to re-evaluate their finance and service system requirements. They looked at a number of solutions. Access made the shortlist and were finally selected as the chosen solution. Stephen explains why: “The key factor for us in choosing Access was their fully integrated service management solution. The Access team have a strong product with many reference sites and we could see that they were a company we could work well with. We wanted a user-friendly system that we could trust and that would grow with our business. Access as a reseller were very professional and were committed to adjusting the system to meet our precise needs.”

Copy IT's key requirements

Two of their main requirements were meter billing and stock. Put simply, meter billing allows them to

Industry	Professional services
Geographic	East Anglia
Employees	25
Turnover	£3m
Solution	Dimensions GoldMine Service Manager GoldLink+

Modules	Core ledgers Meter billing Planned preventative maintenance Billing Workshop Contract management Call centre
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record the number of copies made by a machine and they then charge their customers accordingly. They also needed a good diary function as well as integrated accounts.

Call centre and scheduling

Using the call scheduling module, jobs/calls are allocated to the 11 technicians, who can then look at their list of calls via a daily and weekly calendar view. Using different colour indicators, Copy IT can quickly differentiate between different types of jobs and scheduled activities.

In the back office, the call centre module allows the team to record calls, toner requests, support calls, manage the allocation and despatch of calls, as well as manage the closure of any calls.

Stores

Technician van stock data enables Copy IT to monitor all parts usage within the system and ensure that technicians' stocks are replenished efficiently. This is achieved by setting minimum and maximum re-order levels against each location, in both vans and stores. Service Manager then analyses the stock position of each van, checks the current physical level in stores and any outstanding orders due in. The same process assesses all outstanding service calls that require that part to create a suggested re-order list. This means that the creation of purchase orders to maintain stock levels is completely automated, as default suppliers are set up against parts along with pricing information.

Once stock is available in stores, Service Manager will then produce a list of replenishment transfers from central stores for each van - effectively a pick list for the van. This will confirm the replenishment level for the van along with calls which are waiting for the parts in question. The stock movements are then processed by the software.

Stephen Tate comments on the impact that Service Manager has had on the stock side of the business. "It has revolutionised the way we work. Stock re-ordering within the system has certainly been the biggest improvement we've seen. Previously re-ordering stock was a time-consuming process and we had to manually calculate stock to re-order. The system now works this out immediately, and has simplified the whole stocking process, removing the need to hold excessive levels of stock in the warehouse. Service Manager really is a business critical solution for us and I am confident that it will continue to provide impressive returns on investment for us."

Meter billing

Service Manager facilitates meter billing calculations, where Copy IT charge their customers based upon the number of clicks for each copier (usage charging). Some of the more sophisticated copiers have multiple counters, i.e. per tray. This means that charges can vary by print type. It also facilitates the setting of a different billing account by trays, as opposed to the machine itself. This is required where Copy IT raise self-billing invoices back to the manufacturer they are providing the service on behalf of. This previously required manual intervention - automating this speeds up the process and eliminates billing errors.

The system supports a wide number of billing methods, including advance billing based upon an agreed usage. The system also calculates any excesses which should be added to the following invoice in the next advance. Invoices are calculated automatically and passed directly into the invoicing module (Sales order processing) in Dimensions ready to be printed or emailed to the customer.

Default wording appears automatically within the invoice, so this process is seamless from service to accounts.

The project implementation

Access held a number of meetings and a project plan was developed. The main issues for Copy IT, says Stephen, were "getting all of our data tidied up before we moved over to Dimensions. We also needed to ensure that all staff were fully trained in the use of the system. Access spent a number of days with our users making sure they were comfortable and familiar with the software for use on a day-to-day basis. The Support department has been very good. We've had very few issues so haven't had to bombard them with problems. After the first invoice run, we were up and running."

Future developments

The next stage of the system development is to trial the PDA links with Service manager and then subsequently, to look at GoldMine for CRM. Stephen comments: "We are now getting more and more information out of the system for reporting purposes. What we want to achieve next is to understand the true profitability of all our machines. Once we do this, we will be able to see if there are problems with any machines and take action to ensure customer service and profitability is optimised."

Summary

"The whole project was achieved on time and within budget", says Stephen. "In fact, a lot of the time we were ahead of schedule. We felt comfortable with Access' approach very early on and were confident that they could achieve what we wanted."

Further information

For further information on this, or any other Access case studies, please telephone us on 01206 322575, email case-studies@theaccessgroup.com or, alternatively, visit www.theaccessgroup.com/downloads/case-studies.aspx