



Nationwide Financial Services Provider

Summary

Automation of work activities achieved the desired customer service. Improved reports enabled automation of routine data processing, thus freeing employees to answer telephones. The company provides financial services support to dental practices by the collection of monthly and annual subscriptions.

Details

SQL Server Database managed customer details in an off-the-shelf application. The same application was managing subscription invoicing. Processing times and tracking had become problematic.

Procedural changes requested by the clients, necessitated the development of various improvements in the application.

The main business issues solved were related to invoicing and tracking changes in subscriptions. The reports are used by the company accountant, and are critical to computing monthly revenues and transferring funds to company clients.

A major part of the solution was to create a new suite of reports. Used throughout the business either for internal reporting, checking data inputs or communicating revenue figures to company clients. Most of these reports had been produced incrementally over the years and they were in need of radical overhaul.

During testing various bottlenecks were identified in the application. Once patched versions were available we re-tested and verified whether the required functionality has been achieved. We also suggested various improvements in the software features in order to facilitate work flow.

Deployment included a period of time as a test run, assisting users to learn new features and, establishing the most effective ways of organizing work using the improved software.

Technical means:

- **Crystal Reports**
- **SQL Server Studio**
- New business logic was incorporated into views and stored procedures