TaskCentre ®

Tidyco turn its static ERP and CRM systems into real-time, intelligent applications.

"Automating our credit control process delivered three primary benefits. No employees are required to conduct heavy but essential administration duties, company terms of trade are always adhered to and cash flow increased."
James Tidy, Director for Tidyco Ltd.

Sage Line 500

TaskCentre ®

The UK's leading Business Process Management Solution

Business Requirements

⇒ To automate the distribution of exception-based business documentation to suppliers and clients.

⇒ To turn its static ERP and CRM into proactive, intelligent applications that deliver information to employees when they need it

Solution Deployment

⇒ The extraction, formatting and real-time distribution of business-critical information for its Sage Line 500, Tidyco SQL CRM and MS Access Applications.

⇒ The automation of Tidyco's credit control process.

⇒ The streamlining of its sales process through real-time document delivery

Business Benefits Delivered

⇒ A significant reduction in operational costs

⇒ The transformation of static applications into real-time, proactive systems

⇒ A reduction in cost for stakeholder communications

⇒ The intelligent monitoring of and alerting on client accounts

► **Company**

Tidyco

►**Industry**

Hydraulic and pneumatic equipment to industry.

►**Geographies**

United Kingdom

Case Study: Tidyco

Tidyco, formed through the merger of Tidy Hydraulics and Tidy Technical is one of the UK's leading providers of Fluid, Pneumatic Systems, Plant and Equipment.

Tidy Hydraulics has provided complete hydraulics and pneumatic service to rail, marine, defence and general industry for over 20 years. The company has an enviable reputation for high quality and best value produces and services.

Tidy Technical has over 25 years experience of managing plant equipment and tools and ensures that it remains safe, efficient and in service.

With Tidyco supporting a wide variety of industries, inclusive of the UK manufacturing industry, keeping costs low is essential. As a result, it required a solution that would drive company efficiency, enable it to increase cash flow and increase stakeholder satisfaction.

The beginnings of Tidyco and Orbis TaskCentre®

Before the deployment of TaskCentre®, Tidyco understood the importance of stakeholder communications and would often commit significant human resources to this activity. Specifically, the employees of Tidyco would manually extract, construct and distribute business documentation to clients and suppliers each working day.

James Tidy, Director for Tidyco, highlighted the problem with this outdated approach when he said, "At Tidyco, we invest heavily in our IT infrastructure but it became clear to me that something was missing. Our ERP and CRM solutions provided all the functionality we needed but they still required employees to conduct bureaucratic but essential activities." He continued, "TaskCentre® addressed this problem by automating the business processes that our employees routinely conducted. Consequently, we have already saved countless man hours whilst reducing costs."

With the ability of TaskCentre® to connect to any number of ODBC compliant data sources, Tidyco was also quick to set up complex Tasks that drew information from its Sage Line 500, Tidyco SQL CRM system and MS Access database. Indeed, Tidyco sees TaskCentre® as the middleware that its IT infrastructure needed to achieve its true capabilities.

Automated Business Processes that have enabled Tidyco to drive efficiency and reduce costs.

Tidyco has deployed the business process automation capabilities of TaskCentre® extensively and with dramatic effect. For instance, is has significantly increased company cash flow through the automation of its aged debtor retrieval process.

Pre-TaskCentre® this was done manually and the company would suffer from the same expenses and costs that most companies still absorb today. Yet, through the use of TaskCentre's® ODBC Query, Format as HTML and send SMTP 'Actions,' Tidyco fully automated this process saving time and material costs. Furthermore, Tidyco also uses the

same functionality to keep decision-makers aware of real-time changes to the credit statuses of clients. The result has been a significant reduction in debtor time cycles and invoice queries.

James highlighted the benefits of automation that his company has derived when he said, "Automating our credit control process delivered three primary benefits. No employees are required to conduct heavy but essential administration duties, company terms of trade are always adhered to and cash flow increased." He continued, "The return on investment has been immediate."

The provision of real-time information was always an objective of Tidyco's deployment of TaskCentre® and, in particular, company communications with suppliers and clients.

Order confirmations and sales despatch confirmations were two human intensive business processes that James was also quick to automate. "Its important to remember that the way we interact with suppliers and clients directly effects the efficiency of operations." James went on to explain how these issues were addressed, "Through using the same three TaskCentre® Actions [ODBC Query, Format as HTML and send SMTP] we automated order and sales confirmations which enhanced our stakeholder satisfaction levels whilst reducing our administration costs."

Tidyco has also automated a number of other business process that have reduced operational cost and increased real-time efficiency. For example, TaskCentre® also

automatically monitors and informs decision-makers of the changing credit statuses of clients, distributes real-time sales information to sales employees and sends real-time copies of quotations to the relevant account manager.

Tidyco's future plans for TaskCentre®

To date, Tidyco has substantially increased company productivity and operational efficiency through the automation of company business processes but James only sees the current deployment as the tip of the iceberg, "We have a number of future projects already planned for TaskCentre® and we will be using the whole array of 'Actions' available." He continued, "TaskCentre® has essentially turned the static information that our IT infrastructure harboured into powerful, automated business processes that deliver critical information in real-time. We no longer require people to 'work' our solutions as they now intelligently 'work' for us."

Tidyco's movement towards the 'on-demand' enterprise is an example of how the Sage community are focusing its attentions towards the automation of business-critical processes. The abilty of the Enterprise to respond to real-time situations is undoubtedly a key success factor for today's organisations.

When asked to provide a final comment on TaskCentre® James said, "TaskCentre® is a powerful product and can be used to automate virtually any employee activity."