

Mailsafe Case Study

Andorran Accountants – Cheltenham

IRIS Users



Background information

Andorran was founded in 1998 and is now one of the leading independent firms of chartered accountants and business advisers in Gloucestershire and its surrounding counties.

There are two Directors, Roger Downes and Sarah Garside both FCA's and they have eight colleagues in the practice. IRIS's software is used for 'day to day' practice activity.

There are approximately 250 emails per day (excluding SPAM, Out of Office Replies etc) that flow in and out of their Exchange 2003 server with Outlook 2007 for users.

Before installing and using Mailsafe, emails were copied around the office to keep people informed which took up Exchange Store space. Staff created client folders in their Mailboxes which were private and personal to them or they printed the email and filed it in the manual client file.

What were the problems with their existing email system?

When staff were out of the office for any reason, and emails needed to be seen, then it was very difficult to know where the email had been filed. It was often a lengthy, time consuming process to search and find relevant emails in Outlook.

Emails were not integrated into IRIS and were kept separately in Exchange/Outlook.

They were also keen on reducing the amount of paper that was being generated and filed.

The folder creation in Mailboxes was also taking up a lot of space on the Exchange server and staff did not want to delete anything 'just in case' it might be needed at some future date. Exchange back ups were taking longer and Exchange was not as 'healthy'.

Why was Mailsafe chosen?

It had the requirements they were looking for in the storing/archiving of emails in a safe and efficient manner at a cost effective price. For users it is a user friendly program and was compatible with their current programs i.e. Exchange, Outlook and IRIS.

What Mailsafe features do Andorran use?

All emails are automatically archived to a central store outside of Exchange so that there is a permanent record of all emails for the Practice. The central email store is accessible by users from a Mailsafe toolbar in Outlook for fast searching, finding and viewing. Users no longer need to save their emails to folders 'just in case' they might be needed in the future

Mailsafe has an automatic tagging/indexing facility that is used to tag emails by Client Id and Name, the same ones that are used in IRIS. Automatic tagging does not affect the normal flow of emails in and out of the Practice and requires no manual intervention at all.

IRIS 'keyboard' hook automatically links tagged emails with IRIS Practice Management software.

What benefits has Andorran found by using Mailsafe?

No email is ever lost or mislaid, and it's much easier to find emails that have been sent and received.

When searching for tagged emails e.g. Client Id or Name then both sent and received emails are listed in chronological order together with the email previews. 'Email conversations' are easily followed replacing the need to switch between Inbox and Sent searches in Outlook.

Mailsafe is easy to use and integrates with Outlook and also has a Windows Explorer link for immediate access to Client documents that are stored in Windows folders.

Printing of emails has virtually stopped together with paper based filing.

Time savings are in the order of 10 minutes per user per day but it's the speed of access and sheer convenience that makes Mailsafe such a helpful tool.

"Mailsafe has helped us to take a big step forward in office efficiency – not quite Neil Armstrong, but you get the idea."

ROGER DOWNES - DIRECTOR



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