

Mailsafe Case Study - Accountants

Christian Douglass – Manchester

IRIS Users



Background information

Christian Douglass is a three partner firm of Practicing Accountants with offices in Manchester, Carlisle and Twickenham.

There are twelve users of Mailsafe within the practice. IRIS is an integral part of the 'day to day' activity.

There are approximately 300 emails per day (excluding SPAM, Out of Office Replies etc) that flow in and out of their Exchange 2007 server with Outlook 2007 for users.

Before installing and using Mailsafe, emails were filed in private folders within individual users mailboxes, which took up Exchange Store space. These folders were private and personal to the individual and there was no formal structure or policy to email filing or printing.

What were the problems with their existing email system?

When people were out of the office, it was very difficult to access emails that had been sent to or received from clients. Consequently they found it very difficult and time consuming to trace emails. There were also similar implications with staff changes and accessing historic emails.

Emails were not integrated into IRIS either.

Why was Mailsafe chosen?

They felt that it would meet filing requirements for emails and would create a standardised filing structure throughout the practice for emails.

Christian Douglass liked the look of Mailsafe during the demonstration and thought it appeared very easy to use because it integrated directly with Outlook which was 'open' all day long.

What Mailsafe features do Christian Douglass use?

Client emails are manually tagged which enables all users to share and collaborate on client matters without the need for forwarding emails around the office. They can see at a glance the emails that relate to each client and the various sub-categories within each Client file e.g. Audit and Accounts, Tax etc

The IRIS 'keyboard hook' is used so that whilst viewing a Client's details in IRIS, users can simply press a couple of keys simultaneously and instantly the emails that relate to the client are displayed.

Mailsafe uses the same Client Id's and Client Names as IRIS when tagging emails so that further filing is not necessary.

The tagging of emails is carried out manually by users from the Mailsafe Toolbar in Outlook. The automatic prompt is used when sending emails. Tagged emails are archived to a central store outside of Exchange so that there is a permanent record of all emails for the Practice, all in one place.

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.

What benefits have Christian Douglass found by using Mailsafe?

Administrative time savings are significant; emails are no longer 'lost in the system'. Everything is there at the click of a button from Client information in IRIS, right through to email 'conversations'...

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.

Time savings can be as much as one hour per user per search when tracing email conversations and advice. This is due to the speed of searching, instant access and not having to go to the physical client file to find correspondence.

"Mailsafe is ideal because it enables us to centrally store client emails and advice. The search facility is instant and easy to use saving time and resource and enhancing the service provided to our clients."

CRAIG KENNEDY – Accounts and Audit Manager

