

## Mailsafe Case Study - Accountants

Atria Associates – Sutton, Surrey

IRIS Users



# Atria Associates Ltd



### Background information

Atria are ACCA registered auditors, accountants, tax and business consultants acting for small to medium sized businesses and personal clients. They also provide advisory services to other accountants.

Paul Scholes is the Director and there are three users in the practice. IRIS's software is used for 'day to day' practice activity.

There are approximately 50 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, each user saved emails in administration and client folders within Outlook. Two or three times a year, using Adobe Acrobat, combined emails as PDFs on administration and client folders on the server.

What were the problems with their existing email system?

Combining emails to PDFs from individual Outlook folders was clumsy and time consuming, and without a central email store resulted in several PDFs per folder per topic, with multi-copies of the same email. Consequently finding one or all of the emails on one specific aspect was difficult if not impossible.

This difficulty was highlighted at a regulatory visit from the ACCA in which Atria were unable to provide a complete and chronological email history for any of the five randomly selected clients.

Why was Mailsafe chosen?

It was the only system around that offered flexible tagging. It also appeared easy to use and came highly recommended by another firm of accountants.

What Mailsafe features do Atria 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.

Atria use a mixture of Automatic and manual tagging of emails and uses the same Client Id and Client Name as used in IRIS.

The IRIS 'keyboard hook' has been found to be extremely useful too when IRIS is open with a Client's details and their emails need to be viewed at the same time.

What benefits has Atria found by using Mailsafe?

'With 98% of all client communication being via email, it's probably the most useful piece of software we have bought in 10 years. We moved from a complete email mess to un-mess within days of installing it and it now operates seamlessly.

We make use of the archive search facility several times each day and it's particularly helpful when a client calls to discuss any aspect of his/her affairs when, within seconds, we can have a complete tagged list of email messages tuned to function, topic, year, phrase etc making the call far more valuable.

Within this, the biggest benefit is having one store of all emails in and out of the office, accessible to all three of us meaning that it doesn't matter who is logged in or away from the office the store is complete and up to date for both incoming and outgoing mail.'

Time savings are in the order of two hours a week for Paul Scholes the Director and a further two hours a week for his two colleagues. This covers not only the saving in searching for information but saving in manual sorting and archiving that all three users had to carry out on their in and sent boxes several times a year.

'Mailsafe is as much a part of our practice as Iris and Office and, as such, I cannot imagine trying to do business without it.'

PAUL SCHOLES - DIRECTOR



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