

Isosceles Choose Exact For Web-Based Service Platform

With the evolution of the internet and flexible working practises the boundaries for selling and recruiting are no longer defined by the location of an office. However, this has increased the requirement for easier ways to share and access information.

The flip side to all of this extra 'business' freedom has been the need to find new ways of providing efficient and effective controls with an audit trail.

The Challenge

Isosceles Finance is a leading outsourced accounting and business services supplier. Isosceles has grown quickly, supplying a high quality service with industry expertise.

Isosceles already had an excellent team of professionals with relevant industry expertise, but it lacked a platform upon which to build its services portfolio, and consolidate its processes and best practises – something which could encapsulate its intellectual property.

"We wanted a secure repository for client information, which could also be accessed by our clients. We needed workflow to be able to build applications with controls over authorisation and process." Commented Mike O'Connell (CEO Isosceles). "Geographic independence was also vital so that we could service client offices whether they be in London, Edinburgh or New York. With a distributed workforce of our own we also needed a common way of sharing information, diaries,

planning and of capturing time and expenses internally"

The Solution

Isosceles looked at a broad range of products, some of which had strong scanning and document management functionality, others which were state-of-the-art portal products or had major strengths in time capture and planning. "We needed a product which combined aspects of each of these but which was easily configurable and allowed us to build our own applications" said Mike O'Connell.



Isosceles selected e-Synergy from Exact Software. The workflow, collaboration and document management functionality provided the platform that was needed. e-Synergy had been developed from an accounting and finance perspective and is used extensively by technology companies. Isosceles also recruited e-Synergy experience into their IT team, this meant that they were able to customise and build applications for clients easily and quickly.

Initially e-Synergy was rolled out for internal use only. The introduction of

web-based employee diaries, job scheduling, time and expense capture greatly increased the visibility of the Isosceles team's activities. Managers were able to look at their consultant's availability and schedule client work much more efficiently. Employees were able to review their own and other employee's calendar activities from any location.

Once the system had been rolled out internally, phase two was to put the client portal in place.

"One important part of the equation was to facilitate distributive scanning, so that paperwork could be scanned from any client location into their account within e-Synergy. We ended up having our own application built." Said Paul Bradley, Implementation Manager, Isosceles Finance

The Results

Now client documents can be scanned and accessed from anywhere in the world. Work-flow can be created to build

applications such as invoice and expense authorisation, purchase order authorisation, goods receipting, timesheet authorisation to our client's specific needs rather than trying to make them all work in a 'one size fits all solution'.

"I am particularly pleased that our system implementation team managed this process from start to finish. We took the CD out of the box and configured, implemented and developed the application completely ourselves" Said Mike O'Connell.

Every company needs a properly controlled, auditable environment. This is especially important if you are outsourcing or using any kind of third party services support. At Isosceles we are now able to offer a platform which improves efficiency, visibility and control.

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