

# JayBase – Sales Force Automation System



Richard Jay Laundry Equipment

## What They Wanted

Richard Jay Laundry Equipment, an Adelaide-based, national importing distributor of commercial and industrial laundry equipment, has a heavy sales focus. They had grown to the point where an integrated sales management process, from first contact to order fulfilment, was imperative.

It was also essential to reduce the time taken to produce accurate quotes using current product information. And they needed to support their remote workforce by giving them the ability to produce these quotes both online and offline.

Finally, they wanted a system that could be used easily by new users, who were already familiar with Microsoft Office.

## Solution Provided

After some initial discussions, a solution was designed that extended Microsoft Outlook in a way that enabled users to share enquiry, quotes and order information in a shared location, and also enabled their data to be taken offline.

A set of Outlook customisations were created and embedded into their Microsoft Exchange Server public folders and made available to the sales force through the use of 'Public Folder Favorites'.

By leveraging existing Outlook functionality and their Exchange Server infrastructure, we could avoid extra training requirements, as users were already comfortable in this environment. The application could also re-use functionality, such as tasks and the sending of emails, which helped keep costs down.

The solution was tailored to their existing business processes, providing extra benefits. Because the application triggers emails to support staff and account clerks, an improvement to the overall efficiency of the office team was experienced, above and beyond the initial requirement to minimise the time taken to produce quotes.

## Technologies Used

The following technologies were used to develop and host the JayBase application:

- Microsoft Windows Server 2000/2003
- Microsoft Exchange 2000/2003
- Microsoft Outlook
- Microsoft Word

Development Tools and Technologies

- Visual Studio
- COM
- Collaborative Data Objects

## Outcome

Probably the best way to describe the outcome is to directly quote Managing Director Carolyn Kirk:

"IT has before now been a necessary evil, one of those things that you know you have to have, but that makes you groan. You've made software development an enjoyable experience, and we're really excited about the results. Your consultative approach during the design phase means we have directly benefited from your experience in working with a variety of businesses, and you reflected back to us how our business most effectively works."

Richard Jay now has the equivalent of having an online process manual specific to their way of doing business. A new staff member could start work straight away with only JayBase and the HTML Help File to guide them, with little room for error.

For more information on this system, please contact Dragonfly Software on +61 8 8410 8889 or email us at [info@dragonflysoftware.com.au](mailto:info@dragonflysoftware.com.au).

