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Case study

AllwareIT

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Overview

Allware Systems is an IT Support company based in Surrey. They commissioned us to develop a bespoke management system that allows them to securely manage the day-to-day workflow of their jobs, clients, contacts and client assets. The system is accessible both remotely and on premise meaning they can respond to their client's needs 24/7.

Challenges and objectives

One of the requirements for this project was to enable engineers to use the system remotely from any type of device. This meant that we needed to optimise the system so that it was equally useable from both mobile and desktop devices.

Another requirement was to provide a high level of security as some of the information the system is holding is private and/or confidential. We therefore put in place 2 Factor Authentication and Database Encryption to make sure all security requirements are met.

Allware Systems deals with many job requests on a daily basis, so it was imperative that we build a workflow system that is intuitive, easy to use and flexible at the same time.

Our solution

We analysed all the business requirements and developed Allware's Job Management System as a web-based application. Allware's engineers can log into the system from their desktop computer, tablet, or mobile phone.

Each engineer is assigned with jobs. Once an engineer starts the job, the system records the time spent on it up until the point that the job has been completed, allowing for accurate tracking and billing. Every step of a job's resolution is tracked by the system allowing for both detailed internal evaluation and to allow Allware to easily see the status of every job.

The system also allows engineers to set up one-off or recurring reminders for themselves to ensure tasks never get overlooked.

It provides a repository for all pertinent information for each client along with the history of all the jobs that were completed for them. This allows the engineers to have a single 'point of truth' for all the client information necessary for them to quickly resolve any issue.

In phase 2 of the project, we added an asset management module to the system (ITAM) which allows Allware to easily manage all the IT assets for each of their client's businesses. We implemented a visual asset diagram which makes it easy for engineers to get a full overview of each company's assets and where each asset is located in relation to each other. A client's IT architecture can be quickly modelled by simply dragging and dropping Assets into the correct place in the hierarchy.
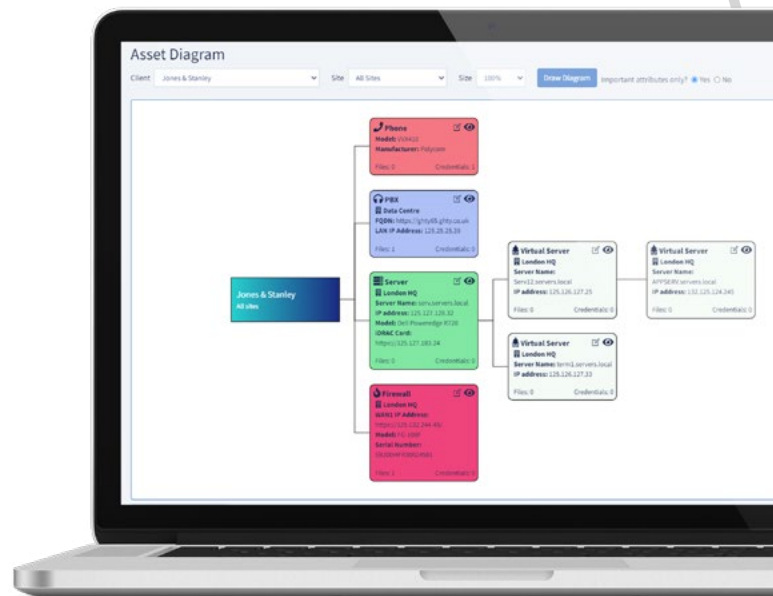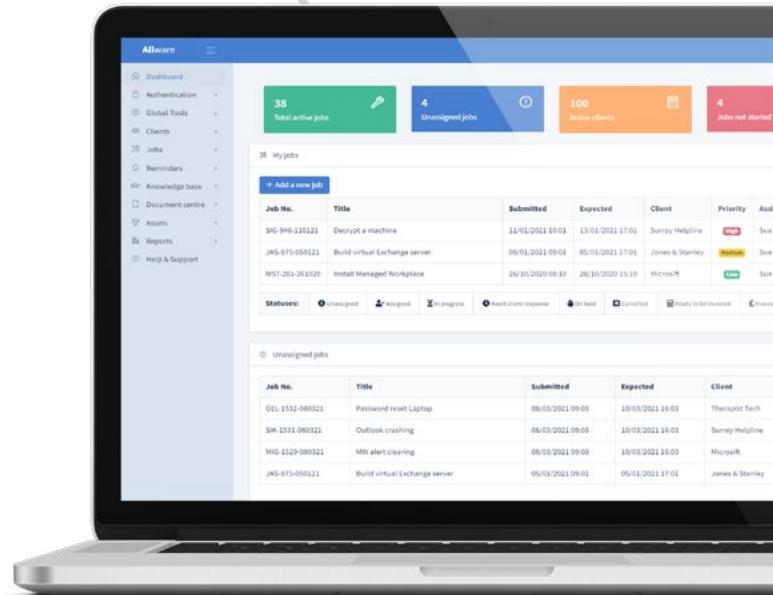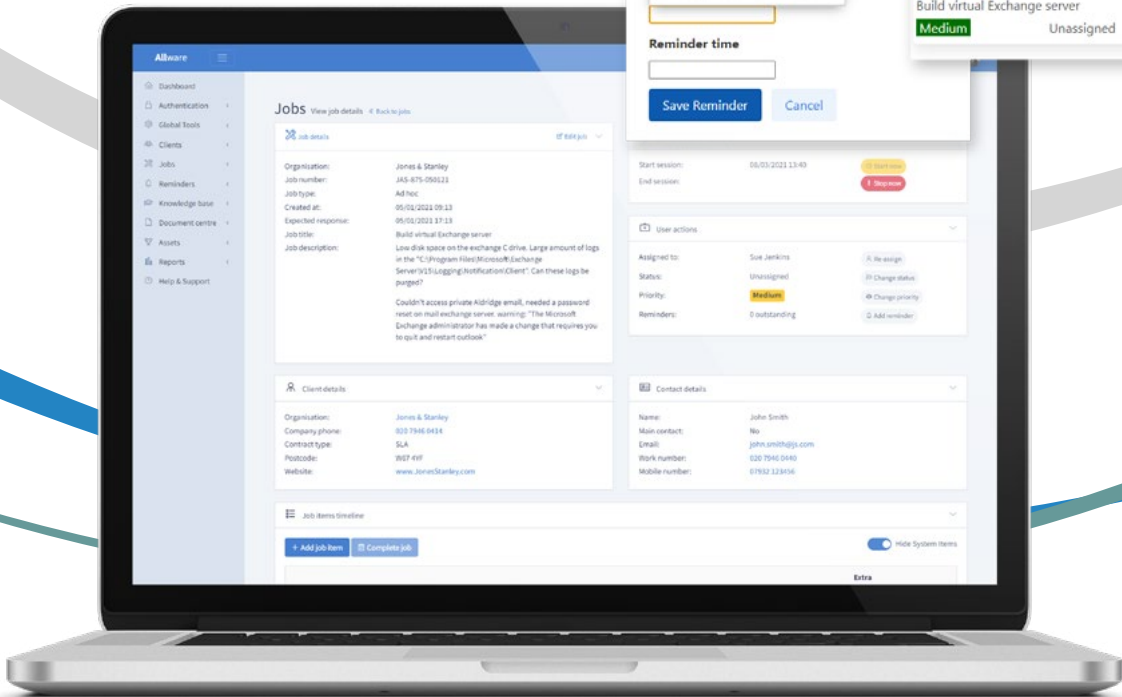
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Results

This web-based system makes Allware's workflow extremely efficient and allows engineers to manage most of their daily tasks through one centralised system, whether they are in the office, on-site or at home.

It has been particularly helpful to the business during Covid-19 lockdowns as it allowed all engineers to carry on working and supporting their clients remotely during these unprecedented times.
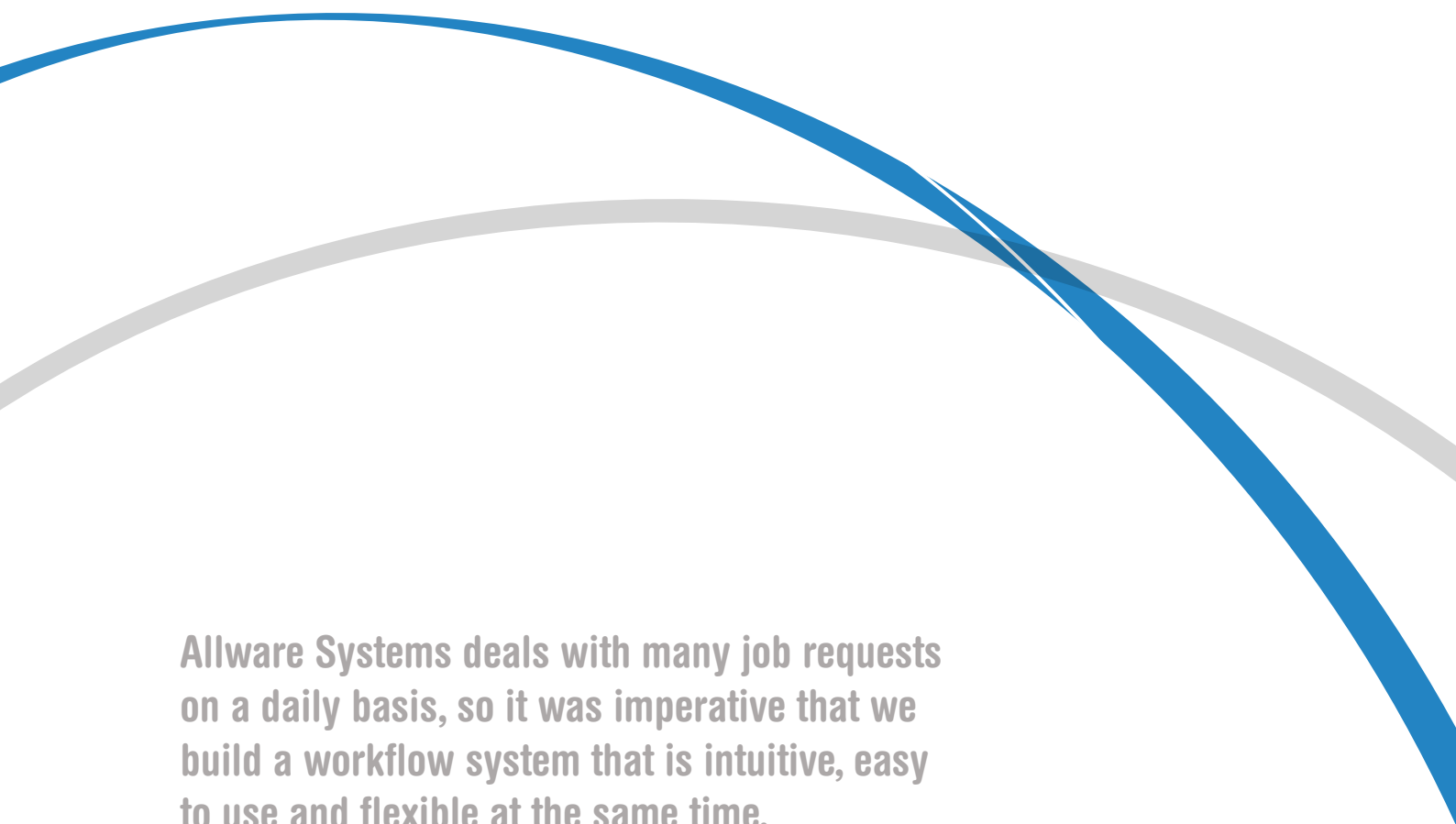
66 Client quote

"We needed a CRM ticketing system written for our business that had a specific set of security needs in order to ensure our customers' data was kept secure. After several productive meetings we decided to use CM System Designs to develop our main ticketing system.

Throughout the process they have understood and interpreted our needs to the letter and provided us with a system that has transformed our day-to-day work. We are very pleased with the result and very impressed with the level of expertise utilised to develop this system."

Phil Ware

Managing Director, Allware Systems

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Future plans

There are several possible enhancements that we're exploring together with the team at Allware.

One is to integrate the system with their accounting system so that clients can be automatically invoiced and given the ability to settle their account online.

Another possible direction is to enhance the system by adding a client facing portal that will allow Allware's clients to login into their account, see their issue's progress and interact with Allware's engineers if required.

There is a further option of creating a full client-facing ticketing system that is fully integrated into the Job management system.

In future the system could be enhanced to support different communication channels such as Instant messaging and SMS as well as traditional emails.

The reporting facilities will also be enhanced as the system accumulates more data to provide Allware with greater insights into the performance of their business.

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