Digital Unity Limited

Product Brochure

2019

Much more than a CRM

Each of our bespoke Cloud based solutions are license free and designed around our clients needs and business processes. By automating tasks and consolidating data our clients can concentrate on their core business whilst accessing their information in an easy and secure manner.

[Visit our site](#)

Work Smarter

Suffering from spreadsheet overload, data all over the place?

A common and ongoing challenge we see businesses facing is the fragmentation and consolidation of their data. The fragmentation begins when multiple spreadsheets are used to track data or when online services are used for specific purposes. We overcome this by developing bespoke systems which can pool these data sources to give better insight and save time.

What we do

We analyse your requirements, business processes and data storage to allow us to construct a system which fits not only your needs now, but is capable of growing with you. This brochure highlights just a few of the systems we have developed and the functions provided. What we can do for you is really only limited by your imagination.

Sales	Logistics
Projects	Healthcare
Insurance Policies	Events
Payroll	Government Projects

Table of contents

Listed below are some of the systems, and their functions, which we have previously created for clients. Clicking on any of the entries will take you to the relevant part of this document.

Overview of systems and functions

Over the past 10 years we have developed many bespoke systems. Whilst each is specific to an individual organisation there are some functions and processes which are shared across all businesses, regardless of size, sector and location. These common functions are listed below and are just a highlight of the business processes we can assist with.

SMS	Whether it is a text to let contractors know how much their wages are for the week, or one to confirm acceptance of an order; our system will allow you to seamlessly contact your clients via SMS. **TextMagic**
Email Marketing	Targeted email marketing is a great way to keep in contact with clients. Keep your system synchronised with online services or go one step further and create campaigns for your contacts. **Awber - Mailchimp**
Calendar Integration	Diary management is made easy by linking all your calendars to our system, allowing appointments to be created, updated and deleted across all platforms in one simple process. **Google Calendar - Office 365 Calendar**
Email Integration	Integrating to your email system ensures that a thorough audit trail can be saved against each customer, for example all inbound emails can be archived automatically to a specific contact. **Exchange - IMAP - Office 365 - Google Business**
Website Integration	We have provided a number of solutions which interact with different website frameworks. From an e-commerce business running Opencart where we keep website sales in sync with till software, to updating calendars and content on Wordpress sites. The possibilities are endless. **Opencart - Wordpress - Bespoke Sites**
Click to Dial	It is important to ensure mis-dials are kept to a minimum in a telesales environment. The integration of phone systems which minimise the opportunity for human error is key to this. Our system allows the exact number on screen to be dialled by one click and the call logged directly within the system.

Financial Integration	Our system has been developed to link to a number of financial software packages including hosted Sage Line 50 and cloud based systems such as Kashflow and Xero. This allows our system to generate invoices and query payments by using a clients' existing finance package, saving double-entry of data. **Kashflow - Sage Line 50 - Xero**
BACS Payments	Why not save some time and energy by completing all of your BACS transfers in one batch?
Amazon S3 Storage	Scalable, secure file storage which allows our systems to grow exponentially whilst removing the worry of the infrastructure and resulting cost.
Mobile App	Although our systems are all mobile friendly we have also produced a number of mobile apps for specific activities such as workplace audits and proof of delivery.

Sales

We have developed a number of systems to assist in sales and. Using a complex ruleset our systems have handled over 2 million calls to date.

System A

Our client consolidated their data by integrating **Sage Line 50**, **Office 365 Emails**, **Mailchimp** and their **website sales** into one system. This has allowed them to grow a scalable sales team and drastically reduce time searching for historical customer data whilst ensuring their marketing efforts are correctly targeted.

System B

This system is used to run 3rd party calls where their clients can upload customer lists directly via a **CSV upload** and the system then manages the clients and campaigns. The system is also integrated into their **VoiP** phone system, so simply clicking a phone number on the screen will activate an outbound call which is then logged on the system. The greatest time-saving aspect is in the production of their **invoices** at the end of each day and the **comprehensive statistics sheets** produced for their clients in Excel. A total saving of over six hours a day was realised immediately. Further details can be seen on our website.

Data Upload ◉ Excel Reports ◉ Sage Line 50 Integration ◉ Office 365 Integration ◉ Mailchimp Integration ◉ Website Integration ◉ VoiP click to dial
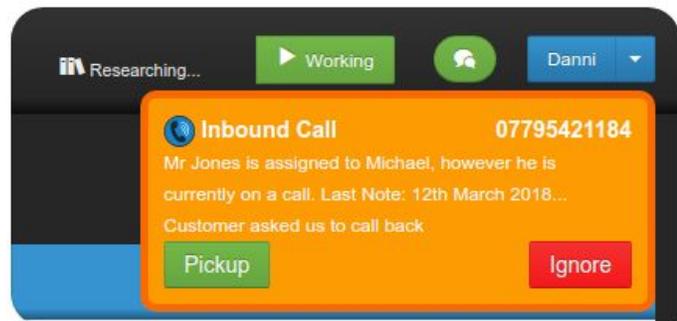
Customer Contact

As customers are generally central to the core business it came as no surprise when this particular client requested a solution that evolves and grows with the business.

The existing workflow for this client entailed dividing up Excel customer call lists between staff, manually de-duplicating data and producing printed letters in the hundreds per day dependent on the outcome of some calls. A task that for a handful of staff is manageable, however as a company grows it becomes a laborious task. Time that can be better spent growing the business!

Carefully mapping our client's workflow and translating it into a software system allowed management to concentrate on their core business, what used to take 10 hours perweek now takes a few minutes at the click of a button.

One key in the success of this system is how it evolves, as our client expanded and moved offices the implementation of an internal chat system and integration of their phone system (see image above) allowed for a smoother client handling process.

Data Upload ◎ **Excel Reports** ◎ **Creditsafe Integration** ◎ **Mailchimp Integration** ◎ **User Chat** ◎ **VoiP click to dial** ◎ **Intelligent inbound call alert**

Logistics

One of our longest running systems is an end to end production and logistics system. Hosted in-house, the solution covers not only the software but also the bespoke hardware on the shop floor.

Clients don't always come to us with spreadsheets and their processes to computerise, sometimes we are required to **reverse engineer old software** and develop a new system. This was the case in one of the first developments we completed in this sector.

The original software had been written decades ago in an older programming language (BASIC) and would not run on modern operating systems. As the business grew the software became harder to adjust and our clients reached out to us to re-make the software and add functions to encapsulate all areas of their current business.

We developed a new system which is capable of managing their business from end to end; from accepting orders through their **website**, to controlling the saws, banders and machines on the production floor to create their product. The system also included integration with **handheld devices** for their drivers to **scan and sign-off** deliveries. With **stock management** and granular tracking of assets, including deliveries, also part of the system the client has doubled their capacity within 12 months of installation and is able to offer a better customer service with **text message updates** and driver **location awareness**.

CNC Integration ◉ **Reverse Engineering** ◉ **Sage Line 50 integration** ◉ **SMS** ◉ **GPS Location** ◉ **Satellite Navigation** ◉ **VoiP click to dial** ◉ **Stock Management** ◉ **Mobile App**

Government Projects

Our clients in this sector include Chambers of Commerce and Enterprise Business Partnerships. The systems aid in the delivery of project activities and allow seamless audits of outputs and outcomes.

System A

The first version of this system was completed in less than three weeks as the client had been unable to access any of their data through pushing Excel to it's limit. In its infancy the system started as a **business support system**, allowing the recording of meetings with businesses and evidencing the support given to meet the needs of their funding bodies, but this system quickly grew to include **email marketing** and **event management**.

System B

This system was initially purchased as a basic system capable of providing **management of work experience contracts**, connecting schools and businesses together. It has since evolved with the company and now also provides **workflow management**, **event management** and is linked to their **finance** package to provide automatic **invoice generation**.

System C

Our client was using a CRM system and a variety of spreadsheets to provide **event management** for schools, managing their relationships with businesses. By **consolidating data** into one central system and automating some tasks it has saved numerous business hours, especially as the system **automatically manages** event attendees and **reserve lists**.

Contract Management ⦿ **Workflows** ⦿ **Event Management** ⦿ **Project Management** ⦿ **Audit Trails** ⦿ **Invoice Generation** ⦿ **Email Marketing**

Payroll

Payments can be a laborious task, whether it is collecting the data to create the payroll or making the payments themselves. We have been able to save our clients a substantial amount of time through using our system for this activity.

System A

One of our first systems was a complete **payroll system** for an accountancy practise allowing contractors to send their hours via **text message** and / or an online form. The system would then automatically **produce reports** for each company. As the customer base grew the time taken to manually complete payment transfers in their online banking portal grew as well, eventually taking an entire day of staff time. The system was adapted so it **produces BACS files,** these are a single file which holds the payment information for multiple payees, allowing our client to transfer hundreds of payments in just a few minutes by uploading the file to their online banking portal.

System B

Our systems evolve as our clients evolve and we constantly review clients processes to ensure that the system is handling any labour intensive work for them. So, when this client reached the maximum transactions they could physically do to pay their contractors we naturally stepped in and produced a plugin for their system which produces **financial reports**, **invoices** and a **BACS file** for payment

BACS Payment Files ● Payroll ● SMS Integration ● Financial Reports ● Invoice Generation

Insurance Inspections

We have completed a number of systems for the insurance sector, from healthcare to drone surveys. The commonality being the storage and processing of insurance documentation and media in a secure manner.

System A

The first implementation was to produce an **automated** system which would alert all policyholders to any changes in their insurance package and allow them to **renew online**. Taking a client from a wholly **Excel spreadsheet process,** using **mail merge** to produce over 1,000 letters at renewal time, to **automating the task entirely**, **generating and printing letters** and envelopes automatically to be posted by a third-party, practically eliminated the need for any staff input at the time of renewal saving countless business hours.

System B

In another system we **securely store and process videos and images** taken from drone surveys across the world. This enables insurance companies to request aerial surveys and access the correct documentation and survey data efficiently and securely. This system has been further developed to allow insurance companies to **integrate** some of the functions into their own systems through the use of an **API (Application Programming Interface)** so they can request surveys directly from their own systems and access the data securely without having to log into our client's online portal, enhancing their customer experience.

Automation ◉ **Secure Storage** ◉ **API** ◉ **Video Processing** ◉ **Image Processing** ◉ **GDPR Compliance** ◉ **Mailshot** ◉ **Email Campaigns**

Event Management

The first system we built, which we still maintain today, is a nationwide training package.

Our client runs training courses across the UK and by using a paper and Excel based system had robust and well established processes in place.

We developed a system which automated their established process and provided new facilities to support the full service management of their events. This included the generation of **training course certificates** and the creation of an **online booking system** fully integrated into their website.

The **event management** system takes care of the customer journey by updating attendants before an event with **reminder emails** and attachments with further information. The system also manages the **reserve list**, should an attendee drop out it automatically contacts and fills in the space when possible.

It is always important to track the success of an event and **customer satisfaction** is captured using automated post event emails, allowing each delegate to submit their feedback.

Course Feedback	
Fantastic course, the tutor was extremely thorough and explained everything well.	
★★★★★	Our contact
★★★★★	Course Content
★★★★★	Course Delivery
★★★★★	Overall rating of the service received

SMS Reminders ◉ **Customer Satisfaction** ◉ **API** ◉ **Website Integration** ◉ **Document Generation** ◉ **GDPR Compliance** ◉ **Event Management** ◉ **Email Campaigns**