Case Study
Industry: Tax and Accounting

Client

The customer is a value-driven consulting services organization with Scientific Research & Experimental Development (SR&ED) tax credit claims as their area of expertise. They work closely with majority of the small & mid-sized R&D firms to help them with their tax claims.

Executive Summary

The customer with extensive experience in providing financial and technical expertise to companies claiming R&D tax incentives wanted a process of streamlining claims and mark opportunities against different accounts by creating a workflow and process mapping.

Synergy Technology Services, having delivered a number of workflow management and process agile solutions was given the opportunity to create a process workflow management system.

Technology

+ Sharepoint 2007,
+ C# .Net
+ .NET Framework 2.0,
+ SQL Server 2008
+ Visual Studio 2008,
+ SSRS

Solution

The process management for tax claims has to be capable of logging the claims, opportunities and invoices raised against a client. Report generation of the record for technical reviews and financial reviews of SR&ED is needed.

+ Developed an application that would create claims and opportunities against different accounts.
+ This application enables the customer to maintain a flow of activities that will process the claims and invoices.
+ Claims and invoices raised will be logged for financial review.
+ Reports are generated for technical and financial review.
+ Form based authentication unlike windows based.
+ Custom workflow to perform mathematical calculations based on data pulled from tax analysis.

For more information, please contact **info@sts.in**
www.sts.in

Challenges

+ To fetching huge volumes of data and display in tabular format without recreating the list as a separate entity
+ Integrating SSRS (SQL Server Reporting Services) in SharePoint.
+ Invoice processing using complex mathematical calculations, which otherwise could not be achieved using designer workflow.
+ Application required accessibility to internal and external users.

Business Impacts

+ Efficient claim management and opportunity conversion.
+ Streamlined financial and technical review from reports generated.
+ Robust mechanism to calculate and interpolate the tax claims to the workflow.
+ Reduced time to delivery of tax credits.