CASE STUDY

INDUSTRY:

TAX & ACCOUNTING

BUSINESS SOLUTIONS
DELIVERED

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 & midsized 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.

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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.