

Building a business with SaaS

CyberSafe, the first CODA 2go customer, talks about its experience and the benefits SaaS is delivering to the business.



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Software as a Service (SaaS) provides businesses of all sizes with a new choice in terms of the platform on which they host their business applications. Although SaaS has been proven in many areas, there has been much debate over the practicalities of SaaS accounting applications, with FDs questioning subscription pricing models, functionality, security and integration. Tim Alsop, Technical Director of CyberSafe Limited, was one of the early adopters of the Salesforce™ CRM system and subsequently CODA 2go, the first enterprise SaaS accounting application built on Force.com to integrate with Salesforce. Here, he shares his experiences and describes the benefits SaaS has delivered, and continues to deliver, to his company.

Headquartered in the United Kingdom since 2001, CyberSafe is focused and committed to the delivery and support of Kerberos protocol based application security solutions on a global basis. As a small business, in 2001 the company faced a common dilemma - deciding on a systems and business application strategy, when at that time, business applications hosted on the Internet were very new, had limited functionality, and were often expensive. Initially they started in the 'traditional' small business way, using PC based tools like ACT! for contact management, and spreadsheets shared between staff via email. It wasn't until late 2002, when an acquaintance recommended salesforce.com's application, that Tim started to take notice of SaaS.

"Salesforce.com was 'pre-IPO' at the time and it was a relatively new product, but I could immediately see the attraction," explains Tim "The plan was that it would be developed into a full CRM offering for our company, and in the meantime, it was exactly what we were looking for to meet our customer support portal requirements. Our existing tool, used by customers to report problems to us and track progress, was very proprietary and expensive, and whenever we asked the vendor when the next release was going to be made available, the answer was that they would add functionality if we paid them the development cost. This was hardly what we needed so we decided to stay with the same functionality for a few years. We needed

a solution with a roadmap, and I knew immediately that by replacing it with Salesforce, our costs would reduce significantly and over time we would be able to benefit from the additional functionality included without paying any more license fees."

Over the years, CyberSafe has taken full advantage of the Salesforce product enhancements and CRM functionality, using it to collect leads via the company website, and manage details of accounts and contacts, as well as using it for customer service and support, and giving customers access to the self-service portal. It was only later that the company started using it to track sales opportunities, that Tim started to realize the full potential of the SaaS solution, but there were still areas where functionality was lacking, especially with the product pricing, and quoting functionality.

"I was watching salesforce.com developments closely and started paying particular attention to Force.com, now termed Platform as a Service," continues Tim. "At the time, we were struggling to create quotes for customers from within the system, and so I started looking at commercial products on the AppExchange, which we could use to fill the gap. In general, they were too expensive for us to justify, hosted on other servers instead of using salesforce.com datacenters, or simply didn't meet our needs. They also wouldn't integrate with what was already in place. It eventually became clear that the best way to get what we wanted was to build our own quoting application on Force.com, and that is what we have done. The actual development for this quote application only took two weeks, and then we spent a further three weeks making enhancements and fixing some bugs before putting it live into our salesforce.com instance."

It was at this time that Tim started to notice CODA 2go, following a salesforce.com user event. He was already looking for a new accounting system to replace Sage, which was running on a PC located in the office, and not integrated with salesforce.com, and because he was keen on Force.com for future business applications, he knew it could be the application for CyberSafe.

"We can now create quotes for our prospective customers, create opportunity product items from these quotes within Salesforce, but we also wanted to be able to create invoices directly from the opportunity product items within the same system so that the process was as efficient as possible, reducing any errors or unnecessary administration effort," says Tim. "I knew I wanted an application that made the most of the features offered with Force.com. I quickly realized that CODA 2go had a solid development plan in place for the future, so we can benefit from functionality made available in future releases. Another important criteria was an application with a web interface so that our staff in different countries can all access it and benefit from the functionality and ease of use."

When speaking generally about SaaS, Tim said that security aspects of the technology had never been an issue or concern for CyberSafe – they were confident it would be secure enough if the right technology and hosting vendor was chosen. "For example, if a small relatively unknown company decided to offer SaaS or PaaS, I would have more concerns about the security, and probably also about reliability and availability. However, for a company the size of salesforce.com and with a similar reputation, I am not so concerned about security." Improved accessibility provided by the wider availability of broadband is also a key reason why Tim believes SaaS will take off.

As a developer and vendor of on-premise software itself, CyberSafe was well placed to weigh up the benefits of SaaS for its own applications strategy. They viewed it as a unique opportunity to start the business without expensive hardware to look after, or systems that it would be tied to for years to come. Tim undertook an extensive testing phase of CODA 2go and was the first UK customer live on the application.

CyberSafe was using Sage for all its accounting practices, running on a PC in the accountant's office. It is still using that for accounting as a stand alone system, but previously, whenever a customer order was received in Salesforce, it was passed to the accountant for manual entry into the finance system. There was no direct link between what was quoted and what the customer actually paid for, bought and licensed. As the company grows and the number of sales continues to increase, CODA 2go will help CyberSafe eliminate this inefficiency from the business.

Tim has enjoyed an open relationship with CODA from the start of the beta activity. Initially, he is keen to get fully up and running on CODA's 'opportunity to cash' module, but eventually plans to implement the full system and replace other accounting tools in the business. In the short term, the main goal is to reduce the amount of time and mistakes associated with scanning paper invoices, and manual entry of information. The company plans to run CODA 2go alongside Sage at first, and then export invoice details into Sage so that the information is collected.

CyberSafe began using CODA 2go in mid 2008 and spent a lot of time testing it and listing comments and questions for CODA. Given Tim's very limited accounting knowledge, it took him a little time to understand what everything did and how everything worked. "It was important to me to work with a company that listened to its customers and was prepared to make changes accordingly, as it developed," says Tim. "We have been lucky because we understood the capabilities and limitations of Force.com. Early on we found some issues with some specific multi-currency requirements in CODA 2go when we started testing it, but CODA set to work to resolve those issues. We spent a lot of time working with the beta version of the application and creating new customer accounts, opportunities and invoices to test functionality, and I was very pleased with what I experienced."

Once Tim was happy with the application, he introduced it to his finance department who also gave it some thorough testing to ensure it would meet their needs.

Having a SaaS strategy in place will deliver significant process efficiencies to CyberSafe and means that all business information can be collected and managed in one place, reducing the risk of errors. "We have had a number of experiences in the past, where invoices were sent to customers containing incorrect information," Tim added. "Managing invoices was a full time task, but with CODA 2go we'll be able to automate a lot of that. We'll have access to a complete view of all customer accounts for the first time so my hope is that I can create a regular report of all accounts and related outstanding payments so that we can use it for cash flow purposes."

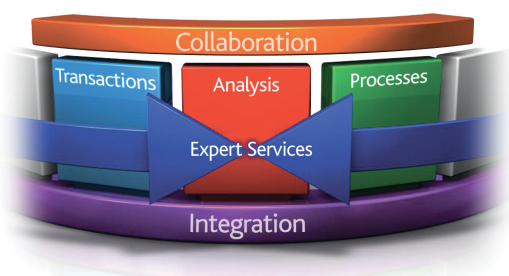
When summarizing his experiences, Tim describes CODA 2go as very easy to use. He first took part in a web demonstration which helped him to understand the accounting processes involved. "CODA explained it really well so I felt a lot more comfortable after the initial demonstration. Part of the demo was showing the cash matching process, which until then was not something I was familiar with, and was confusing. I have certainly learned a lot. Specialist SaaS vendors like CODA need to be prepared to explain these processes clearly when talking to people in general IT and administrative roles."

Tim would recommend SaaS to companies considering a future IT strategy. "If you have experience with other accounting products, CODA 2go will be even easier to get to grips with," he says.



ABOUT CODA

CODA is the choice for finance professionals who need business software and services they can count on.



We provide award-winning solutions that help organizations to streamline and automate their finance processes (from accounting and procurement to reporting and analysis) and to achieve better compliance and corporate governance. CODA applications work seamlessly with each other or independently and they integrate with other leading operational systems to maximize the return on your broader IT investment too. And our products are all underpinned by expert consultancy, training and support services, delivered by teams of experienced accountants, business analysts and technology specialists.

Founded in the UK in 1979, the CODA Group now employs around 600 and has offices around the world to deliver easy, local access to sales, service and support. Around 2600 medium and large organizations, across all sectors, use CODA solutions to control costs, drive performance and ensure compliance, while remaining agile and responsive.

CODA is part of Unit 4 Agresso NV. Headquartered in the Netherlands, the group provides business software solutions to its customers internationally.



Must-have information for finance!

As a salesforce.com customer, you've already got the very best in CRM support, from the leader in Enterprise "Cloud Computing". But what happens when you close a deal? Imagine moving seamlessly to accounting screens where you could raise invoices, chase payments and monitor customers' credit lines. Now, teams across your organization can capture, share and use key business information – whether they are in sales and customer support or in the essential back-office functions of accounting and purchasing.

CODA 2go is a breakthrough in Cloud Computing: an accounting application - designed, built and delivered on the same, single platform of Force.com, it is used as part of Salesforce CRM and hosted for you by salesforce.com.

- Developed by CODA:
 - finance experts for nearly 30 years
 - 2600 customers across 100 countries
- On-demand accounting for growing businesses
- Award-winning, single-ledger design delivers up-to-the-minute information
- Supports your business locally and globally.

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Your organization already has the world's leading Cloud Computing Application for CRM; now you can have the best in accounting too.

CODA – the finance systems specialist – is recreating its award-winning on-premise accounting applications to offer CODA 2go: flexible, world-class tools for organizations of *all* types and sizes, delivered as an on-demand service by salesforce.com.



Because it has been completely built on the Force.com platform, CODA 2go is not just integrated with Salesforce CRM but functions as an integral part of it. This means your accounts team and your other Salesforce CRM users can share information and work together more easily – without duplicated effort and rekeying of data.

Must-have now

CODA 2go is being developed and released in phases to create the first multi-everything on-demand accounting application.

The Spring '09 release builds on the success of our initial Opportunity to Cash offering, to deliver a full accounting solution – combining enhanced support for accounts receivable users with core general ledger and accounts payable.

CODA 2go now includes the following key functions:

- **Accounts Receivable** – covering the Opportunity to Cash process of creating an invoice directly from an opportunity in Salesforce CRM, through to cash matching and aged debt analysis.
- **General Ledger accounting** – supporting accountants' key processes. CODA's market-leading unified-ledger design and flexible chart of accounts structure is now available on demand, including multi-currency and multi-company operational transaction handling, together with day-to-day reporting and analysis.
- **Accounts Payable** – covering the Invoice to Pay process, to support vendor management, purchase invoice processing and payments.



Must-have soon

Following on from Spring '09, the next phases of CODA 2go will be to provide further depth in Financials, as well as leveraging collaborative technologies to deliver even better support for the accounting team. Over time, the footprint will broaden into areas like sales ordering, purchasing and expenses. Please note: the contents of future releases of CODA 2go may be subject to change.

Must-have? Go get!

CODA 2go will transform your accounting – sign up for our webinars to see it in action or for a FREE 30-day trial to see the benefits yourself. You'll also discover: how CODA and salesforce.com are working together to extend your Salesforce CRM opportunities; as well as the latest news, blogs and previews of the next releases.

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