

## GUARD-X USES EXTENDER TO ENHANCE EFFICIENCY AND SERVICE

“We’ve managed to improve both the efficiency of our internal operations and the level of service we give our customers. We couldn’t be happier!”

SOPHIE DE FRANCESCO, TECHNICAL SUPPORT

### Company

Founded in 1938, Guard-X provides comprehensive fire protection solutions to residential, commercial, industrial, and institutional clients. Their services include inspection, installation, and maintenance services for fire alarm systems, sprinklers, extinguishers, automatic extinguishing systems as well as security systems. ([www.guard-x.com](http://www.guard-x.com))

### Challenge

Guard-X was using Sage 300, together with Technisoft Service Manager, to schedule and manage appointments with their many clients.

The critical nature of the services Guard-X provides makes it imperative, from both a safety and compliance perspective, that all appointments and follow-ups are planned and executed effectively and efficiently. Over time they had developed an extensive list of requirements that couldn’t be fully met by their existing systems.

These included:

- Automating the generation of inspection lists for upcoming weeks, and the sending of reminders and job details to the allocated staff.
- Generating and sending appointment confirmation notifications, including notices for landlords of upcoming inspections and/or alarm tests.
- Reporting on all unanswered or overdue requests so they could be followed up.
- Adding custom fields to reports sent to supervisors, related to their specific role.
- The ability to include attachments with internal correspondence.
- Automating the execution of a range of recurring tasks on the same day of each month.
- Sending survey emails to customers after appointments have taken place.

### Solution

Guard-X had a well-established relationship with their Sage Solution Provider, D&A Business Management Solutions, and turned to them for advice.

D&A had years of experience using modules from Orchid Systems for client customizations, so it was natural that they would suggest involving Orchid.



Work *Smarter* with Orchid

## Solution (Cont'd)

The solution D&A proposed and developed made use of:

- **Orchid Extender** (Developer Edition), given its almost unlimited scope for bespoke Sage 300 customizations.
- A range of custom Extender Scripts (developed using the Python programming language).
- Custom tables, developed with and used by Extender, to hold the data required by the customizations within Sage 300.
- **Orchid Process Scheduler** to automate the execution of recurring tasks associated with the solution.

## Result

The initial implementation, with a relatively limited scope, was regarded as a great success. This gave Guard-X the confidence to approach D&A and Orchid with additional requests, leading to further project phases, until all the requirements had been met.

Guard-X continues to have nothing but praise for the customizations themselves, and the contributions of both the D&A and Orchid teams in developing and implementing the solution.

In conversation with Sophie De Francesco, Technical Support of Guard-X, she expressed her appreciation for the work that had been accomplished by all parties:

“We’ve managed to improve both the efficiency of our internal operations and the level of service we give our customers. We couldn’t be happier!”

The fundamental drive for D&A and Orchid revolves around ensuring that client needs are continuously met. Attention to detail, as well as thorough analysis and consultation, allows us to achieve client expectations - all while ensuring their businesses continue to thrive.

## Why Orchid?

Orchid Systems, a Sage Tech Partner, has been part of the Sage community for over 30 years. We develop innovative add-on modules that enhance the functionality of Sage software.

Over 7,000 companies rely on Orchid’s Sage add-ons every day.



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