

Close Brothers Invoice Finance CUSTOMER SUCCESS STORY



Customer Success Story

Close Brothers is a leading UK merchant banking group providing lending, deposit taking, wealth management services and securities trading. Employing over 3,000 people, principally in the UK, Close Brothers Group plc is listed on the London Stock Exchange and is a member of the FTSE 250.

[Close Brothers Invoice Finance](#) provides Invoice Discounting, Factoring and Asset Based Lending solutions to SME businesses and forms part of the Close Brothers Banking Division.

The Challenge

Close Brothers' core Invoice Discounting solution is an award winning system called IDeal. Over time, Close Brothers had written a suite of SAP® Crystal Reports to complement the IDeal application to deliver instant reporting capability to their Client Services teams. These reports provide an up-to-the-minute status on each client account.

Being a core internal system to Close Brothers, IDeal plays a major role in the smooth running and efficiency of the organisation, however with the Windows Server support set to expire, swift action was required.

Close Brothers had a requirement to upgrade the SAP® Crystal reporting suite quickly and turned to DSCallards to help with the re-write of the reports and subsequent integration into and support of the IDeal application.

The Solution

SAP® Crystal Server is used to publish and store SAP® Crystal Reports for distribution to the business.

DSCallards, SAP® Business Objects Gold Partner and software development specialists, helped with the SAP® Crystal Server upgrade and designed and built a bespoke .NET web application specifically for Close Brothers. This application was developed against the SAP® BusinessObjects SDK and helps to distribute reports to internal users within a customised web portal.

Although the SAP® Crystal Server portal still resides within Close Brothers, the complexity of its management and administration has been improved with this simpler web interface.

DSCallards assisted Close Brothers in designing and developing an internal web portal that interfaced into these business reports and provided users easy access to reporting formed on role based authentication."

Andy Whiting, Head of IT





Business Impact

The successful delivery of this project continues to provide [Close Brothers Invoice Finance](#) with the most up-to-date and customisable reports, to best support their portfolio of clients. This ensured that Close Brothers had accurate and timely information at their fingertips to make essential credit and risk decisions.

DSCallards delivered the knowledge and experience required by Close Brothers across the full spectrum of both SAP® Crystal Reports and the customised front-end development. DSCallards were able to advise on the appropriate upgrade path and the components required as well as providing licensing for the necessary SAP® BusinessObjects products.

“From the first meeting, DSCallards gave me confidence that they understood the brief and quickly confirmed that at a technical level with my IT team. The process ran smoothly, in terms of specifying, designing, building and testing the solution, so that the implementation ran seamlessly, and inside the time constraints that we had been set by our wider business.”

Andy Whiting, Head of IT



Why DSCallards?

- Established in 2001
- Specialists in SAP® BusinessObjects BI, Analytics and SAP® Crystal solutions
- SAP Gold Partner
- SAP Partner Centre of Expertise (PCoE)

DSCallards, SAP Gold Partner, has been delivering value-driven Business Intelligence and software development solutions to hundreds of customers for many years.

