

Project Tracking and Reporting System

A commercial mortgage broker needed a more efficient system to enter data once into an Access database and through a series of queries have the data automatically refresh an Excel report based on selected criteria.

This is the type of solution that can save a small or medium-sized business, or even a division of a large business, much time, money and consternation. By streamlining the processes that can be handled within the Microsoft Office Suite alone, a cost-effective, easy-to-use system can be implemented, one which is transparent and easily modified to adapt to changing needs.

Work Order Database

A database application was developed for managing window/screen repair orders for a retail hardware business. It consists of an order entry screen at the customer service counter and an order processing setup in the work area in the back. As orders are entered up front, they immediately appear on a work log in the repair area in the back. As orders are completed, details of the work and cost are entered and a second log is generated of all orders completed and ready for pickup. The customers are called from this list. Sales tickets are generated and attached to completed products. This is a type of database app that can be adapted for many different work order type needs.

Screening Process Database

An equity firm needed an efficient way to manage info on products being screened for funding. This involved meeting multiple (sometimes weighted) criteria, checklists, due dates and completion dates for all phases of the product screening process.

In addition to several forms for tracking criteria met, dates and decisions, there are also contact management and status history components, and reports that can be generated at the click of a button.

Data Management for Regulatory and Registration Compliance

Sometimes even a large company does not always want a high-end solution. The regulatory affairs department of a consumer products company needed a database easily accessible from the local area network. The purpose was to organize regulatory and registration data for about 1500 consumer products, and to be able to search the database to find products that met multiple criteria simultaneously. This was accomplished by building an Access database that was easy to update and search, providing the specific needs of the unit without having to rely on a more costly and complicated system.

Claims Substantiation Database

This also provided a more directly accessible, customized, cost-effective solution. It allowed entry of claims records, citations and other evidence needed to manage each case.