

## Maly Delivers CRM Transition for PD Tax



**About PD Tax:** Operating from Leeds and Manchester PD Tax provide specialist tax advice and guidance to clients across the UK. Drawing on significant experience gained in the big 4 consulting firms the team guide and advise their clients on ethical tax planning and problem solving.

**The Challenge:** PD Tax wanted to transfer their CRM and Client Projects from one SaaS solution to another. They wanted to move away from dependence on Capsule CRM and move to [FYI](#). Unfortunately, their customer contact, lead emails and project files were locked up in Capsule CRM and proving difficult to transfer. They needed someone who could securely extract the significant number of files containing sensitive data and transfer them to their internal SharePoint for subsequent upload to FYI when they were ready.

**The Solution:** Maly were able to securely extract all of the relevant data from the Capsule platform and transfer it to PD Tax internal SharePoint site for later upload to FYI. Furthermore, Maly identified that this would be a time intensive manual task and

would also overwhelm SharePoint if the upload of files was done in one large batch. So Maly software engineer Steve created an automated script to extract the data from Capsule and then another script to transfer it in the right format and to the right place in their SharePoint system. This saved PD Tax a significant amount of manual work and ensured the data was transferred efficiently and securely.

**The Result:** PD Tax now have all of their client and lead contact data as well as project information in the internal SharePoint and are no longer dependent on the external Capsule platform. They can transfer the data to FYI when they are ready and have a secure backup of all their important client and project data.

**Client Feedback:** Charlotte Wardle, Financial Manager at PD Tax gave the following feedback:

**What other options did you consider before choosing Maly?**

I explored a number of other avenues however I had concerns over data privacy and service levels with other providers, particularly the ones based overseas. I felt assured by Maly because of your integrity and professionalism, furthermore you were able to be very flexible and fit in with our moving timescales.

**How satisfied are you with Maly overall?**

Very satisfied, Steve kept us updated throughout and was able to work with us to ensure that your deliverable was what we needed. There were a number of moving parts in the project and Steve was flexible with a fluid approach.

**Have we met your initial expectations?**

At the outset I expected there to be a number of issues just because it's technology and software! I was impressed by Steve's knowledge and expertise along with his ability to change your deliverables to suit our needs. There were no issues at all, and Steve always gave the impression that he is an expert in what he does which was reassuring.

**Any other comments?**

Really pleased, no stress whatsoever, would recommend!