

## Case Study

# Surrey Heath BC



## Surrey Heath BC improves customer service with Adelante's SmartPay

### The Requirement

Surrey Heath Borough Council had used an alternative system for over 20 years. The product was used to accept payments by cash, cheque and credit cards. These were processed on a variety of channels including internet, contact centre, post room, automated telephone payments and via a kiosk situated in the Surrey Heath reception. The existing system also supported interfaces to a variety of third party applications that either imported or exported information from the system. These included banking files, Freepay cards, general ledger, accounts receivable, council tax, business rates and parking enforcement notices.

Surrey Heath process around 35,000 card payments per year. With the introduction of the PCI Data Security Standard the landscape with regard to card payments has changed significantly. The existing supplier's system for managing card payments required a significant overhaul to meet the changing PCI requirements. In order to achieve this the existing supplier was only able to provide the income management solution as a managed service. For Surrey Heath this meant a significant cost to upgrade the system and a doubling of the annual support costs.

### The Solution

Surrey Heath BC along with other councils in the Surrey area decided to investigate alternative options. Two other councils in Surrey were using SmartPay, a product developed by Adelante Software Limited in 2002. Surrey Heath elected to investigate further and received a product demonstration at the end of 2011. This was followed by a procurement process and an order for the SmartPay solution was placed in February 2012.

The project to implement SmartPay started with a simple document detailing the configuration requirements. Surrey Heath identified requirements such as users & permissions, fund codes, VAT codes, methods of payment, merchant numbers, bank account details, card types accepted, exports/imports, report requirements etc. Adelante then remotely configured the system to Surrey Heath's Specifications.

In April 2012 Adelante visited Surrey Heath to demonstrate how the system worked and to cross train key members of the Surrey Heath Project Team. At this point an issues log was created and subsequently updated two to three times per week. Over 100 issues were logged and corrected over the next few months. During this time Surrey Heath paid a visit to an existing SmartPay user.



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The knowledge gained during this visit allowed Surrey Heath to improve some internal processes that were no longer required when using **SmartPay**.

Go live was originally planned for early July but this was put back to 5th Sept after a joint review meeting that identified that there were still some additional training and technical issues that needed to be completed. Outstanding issues were resolved in the final few weeks and additional deliverables - signing off procedures, the production of user procedure notes, end user training, etc. – were completed.

When go live occurred there were the usual teething troubles associated with operating a new system. However these only lasted for about a week and during this period the Adelante support was outstanding.

## The Benefits

The main reason Surrey Heath elected to use the Adelante **SmartPay** system was to reduce costs. The return on investment from the reduced annual maintenance costs meant that the product would pay for itself after 5-6 years and the unlimited user licence means these cost will not increase.

Surrey Heath also identified a number of unexpected benefits. The browser based front end made user upgrades very simple. Previously these had to be done on a computer by computer basis. Integration with the Surrey Heath CRM system was also much improved. Adding new fund codes which used to be a complex process is now a much simpler function. The most important benefit was the ability to validate wrongly coded payments before they were exported to back office systems. This removed lots of administration for customer services.

Replacing a 20 year old system was a leap of faith. However, working with Adelante has been a pleasure and the council is completely happy with the outcome. Not only is **SmartPay** a more modern and flexible system, but the replacement costs and annual charges were far lower than the proposed cost to upgrade our existing system. Adelante have also shared details of some proposed new developments which will allow us to extend the payment functionality available to our customers as we move forward.

Janet Jones  
ICT Manager - Surrey Heath Borough Council

Surrey Heath's situation is typical of the problems currently being faced by Councils. PCIDSS represents a huge issue for legacy Income Management Suppliers. Adelante is a payment gateway in its own right and PCI Compliant solutions in advance of the standard being introduced. This protected our existing customers from expensive upgrades and means we can deliver feature rich affordable solutions to new customers moving forward.

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