



QuickBooks Integration, CRM Efficiency Drive Quick ROI with Oasis CRM

Customer:

LevyNET
www.jaxit.net

Business Challenge:

To enhance service and team efficiency, the company needed to eliminate duplicate data entry in multiple systems – FileMaker, Microsoft Outlook and QuickBooks.

Solution:

Web-based Oasis CRM integrates with QuickBooks and fits easily into LevyNET's workflow.

Accounting Solution:

QuickBooks

Benefits & Results:

- QuickBooks integration saves about an hour a day, enabling the company to send invoices to customers sooner.
- The ease of logging service details increases the frequency that technicians note smaller jobs, thereby increasing revenue capture.
- The team closes some service tickets faster, particularly break-fix issues.
- The solution paid for itself in about six months.

We keep I.T. simple!



Like a good accountant, dependable IT service and support is something no business today can go without. For a number of companies in the Jacksonville, Florida area, LevyNET serves as the trusted IT partner, providing affordable, results-oriented services such as Web design, hardware, network configuration and administration, and training.

When it comes to service, LevyNET sets the bar fairly high: striving for a two-hour response time for most service calls. To enhance service and team efficiency, the company looked at eliminating duplicate data entry in multiple systems – FileMaker, Microsoft Outlook and QuickBooks.

LevyNET also wanted to simplify information access by consolidating to a centralized customer relationship management (CRM) application.

“Our information was disjointed and there was a lot of double data entry,” said Jay Sundberg, director of operations. “We also wanted to improve remote access for technicians in the field.”

Complete Customer Management, from Sales to Service

LevyNET diligently evaluated available CRM options, narrowing the field to three. Oasis CRM stood out for its Web-based model, QuickBooks integration and ease of fitting into LevyNET's workflow. KnowTia's willingness to further customize Oasis as needed gave the company even greater confidence in the investment.

“The way KnowTia functions is similar to the way we already function, so our techs didn't have to learn an entirely new way of fulfilling services,” Sundberg said.

The entire LevyNET team now uses Oasis as the hub of all customer interaction, from the first point of contact in the sales process to service to invoicing, as well as linking with any supporting documentation.

*“Oasis probably paid
for itself in six months.
And it can reduce other
costs in the future.”*

– Jay Sundberg, director of operations

“Every little piece of communication with the customer is in Oasis, so we have a history and an accurate record,” said Larry Levy, managing member. “We're able to see what's going on, and we're not leaving little sticky notes on the phone.”

During the sales process, LevyNET depends on Oasis for scheduling, and synchs Oasis appointments with Outlook calendars as well. Instead of creating and storing quotes in QuickBooks, team members now generate and link them with customer records in Oasis – making it simple to locate quotes when a customer calls. LevyNET also stores purchase orders in Oasis, allowing them to track shipments and parts against those POs.

LevyNET enters every service call and appointment in Oasis, and the system automatically notifies customers by email of the appointment. Tapping into Oasis' Web-based functionality, technicians update service tickets while at client sites, selecting from various bill

codes depending on the work done. When issues are closed, LevyNET simply posts that information to QuickBooks and it's ready for billing.

Delivering Efficiency at Every Stage

Oasis CRM delivers time and cost efficiency across every stage of LevyNET's customer lifecycle. The company estimates that it saves about an hour every day on billing by not having to re-enter information into QuickBooks. Plus, it sends invoices to customers sooner than before.

The ease of logging information means that technicians note even the smaller 15-30-minute jobs, which increases revenue capture. Sundberg also notes that the team closes some service tickets faster, particularly break-fix issues.

But the greatest value of Oasis lies in the efficiency in managing customers and accounts for the entire team. Cutting out extra steps and legwork helps LevyNET stay

focused on customers and on target for meeting its two-hour response target.

An unexpected benefit, when LevyNET meets with prospective customers, the company talks about its sound processes – and pulls up Oasis online during conversations to show the system that keeps the team on the same page.

"It makes clients more prone to say, 'This is a real shop that has invested in its processes.' It makes us more legitimate and credible in their eyes."

The end result: increased revenue, real cost savings and better service. "Oasis probably paid for itself in six months," Sundberg said. "And it can reduce other costs in the future."

Soon, LevyNET may move toward a fully remote service team model, an approach that Oasis has proven to support and that will further reduce company costs. Additionally, LevyNET will take advantage of Oasis CRM's customer portal feature to empower customers to look up details of their own accounts.

About KnowTia

Based in Tampa, Florida, KnowTia Corporation has provided client/server-based CRM software for the SMB market, specializing in the complete customer life cycle, since 2001. The company's early integration with Intuit QuickBooks® established it as a highly successful provider of CRM-based software to the small and medium-size business. Based on input from hundreds of KnowTia customers, the company introduced the browser-based Oasis CRM™ product line to maintain the company's position as the best CRM value in the marketplace.

Oasis-CRM™ automates your most challenging business processes. Oasis-CRM™ is designed as a "Total Business Solution," so all of the integrated modules you need to automate your business are included. Every department in your organization uses Oasis-CRM to share and process customer information in an easy-to-use, highly customizable environment. Oasis-CRM™ allows your business to grow by capturing lost revenue, optimizing efficiency and organizing business workflow.

