



Financial Computer Sharpens Competitive Edge with Integrated, Centralized CRM and Support

New York City has come to be known as the “capital of global finance,” where nearly all the world’s largest financial institutions have a presence. Based across the Hudson River in Fairfield, New Jersey, Financial Computer is perfectly positioned to meet the information technology needs of the area’s large financial market.

For 10 years, Financial Computer has provided consulting, implementation, training and maintenance specifically to help financial organizations enhance their operations, from marketing and sales to client service and practice management.

In 2004, the company looked for a more streamlined way to manage client relationships, from sales to service. Multiple, disconnected systems meant double data entry for the staff.

“Our systems were not integrated, so it was redundant,” said Eric Edelman, president. “We would create a ticket in Excel, print it and retype it in QuickBooks for billing.”

‘From Start to Finish, from Open to Close’

Financial Computer considered creating its own service management solution, but the time-consuming approach would have diverted resources away from client projects.

Instead, the company looked at five or six CRM solutions, including Microsoft CRM and KnowTia. The company ultimately chose KnowTia for its integration with QuickBooks, as well as simple, yet full-featured service ticket and client management.

More recently, Financial Computer upgraded to KnowTia’s Oasis CRM, which brought valuable added capabilities such as Web-based access. Available from any desktop, Oasis serves as the centralized hub for all of Financial Computer’s

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– Eric Edelman, president

communication with prospects and clients, as well as ticket management.

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Automated Reminders and Notification

With automated alerts, Oasis ensures that Financial Computer staff never miss important follow-ups for recurring and one-time events, whether it’s to check in after sending a quote or proposal, or check on a customer after a service call.

“Oasis keeps us on top of ourselves by remembering for us, telling us what needs to happen next,” Edelman said.

Customer:

Financial Computer
www.financialcomputer.com

Business Challenge:

Disparate systems created duplicate work for staff members, taking them away from client service.

Solution:

Oasis CRM centralizes all client relations and ticket management, as well as integrates with QuickBooks.

Accounting Solution:

QuickBooks

Benefits & Results:

- With Oasis tied to QuickBooks, it takes one-tenth the time it took before to invoice.
- Invoices go out more quickly.
- Reducing manual data entry gives the company more time to generate service revenue.
- Financial Computer values KnowTia’s product support and customer focus.



Financial Computer creates service tickets for both billable and non-billable activities, and Oasis automatically notifies the team of next actions. Technicians in the field view ticket details on site, and at times update them at client locations as well. This capability keeps client information more up-to-date.

“Oasis brings a sense of accountability when technicians are out there, that everything is being logged,” Edelman said.

An important feature, Oasis also maintains the details of all client hardware purchases, so Financial Computer always knows the status of purchases and the corresponding clients. With automated notification, the software updates clients about their purchases – a nice service touch. Next, Edelman looks forward to completing hardware purchase transactions in Oasis, beyond just managing the information.

Many of Financial Computer’s clients have service contracts with the firm. Oasis keeps up with the various types of contracts and client work against those contracts, so the company always knows where it stands – and can keep clients updated.

Invoicing in One-Tenth the Time

However, the integration with QuickBooks delivers the most compelling efficiency gains. The staff member who handles invoicing simply enters her initials into Oasis and pushes a single button to bring over client service details from Oasis to the accounting application. Invoices also go out sooner, improving cash flow.

“With QuickBooks integration, it takes us one-tenth the time it took before to invoice,” Edelman said. “So, it frees that staff member to serve clients and manage service tickets.”

Likewise, Edelman notes that Oasis lessens his workload, giving him more time for administrative activities.

“I appreciate the efficiency Oasis creates in my office,” he said. “It saves a tremendous amount of money because there is more time to generate service revenue, instead of manually entering data all the time. So, there is not as much of a backlog.”

An added benefit, KnowTia’s product support and customer focus contribute to Financial Computer’s success and satisfaction with the solution. “I appreciate the attentive service and employees at KnowTia,” he added.

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.

