



## Alberta Printer Delivers Personalized Support to 3,000+ Customers with Oasis CRM

### Customer:

Alberta Printer

### Business Challenge:

The company needed a strong CRM application to provide personalized service to its 3,000 customers.

### Solution:

Alberta Printer manages all customer information in Web-based Oasis CRM, giving all employees a current and complete view of a customer's status.

### Accounting Solution:

BusinessVision™

### Benefits & Results:

- Service staff update and access customer information from any computer at client sites – keeping customer data continuously current.
- The integration with BusinessVision eliminates duplicate data entry between the two programs.
- Oasis improves efficiency and customer response capabilities by reducing the cost to manage accounts and enabling personalized service.

Since 1978, Alberta Printer, located in beautiful Calgary, Alberta, has served the region with printing equipment, supplies, service and support on brands such as Hewlett-Packard, Lexmark, Xerox, Epson and Canon. For the company's more than 3,000 business customers, printing capabilities are integral to efficient operations.

Alberta Printer focuses on quality equipment and maintaining the highest standard of personalized service, requiring up-to-date information about every customer's exact equipment and current status.

To manage customer support issues, the company previously used an off-the-shelf customer relationship management (CRM) application, but began outgrowing the solution as its customer and user base expanded. It also wanted to integrate its CRM and Sage BusinessVision™ accounting system to streamline accounting and ensure all staff members have access to important account information.

### A Company-wide, Current View of Every Customer

In 2004, Alberta Printer selected the KnowTia CRM solution for its strong service and support capabilities, as well as the ability to link it with BusinessVision. In 2006, the company upgraded to KnowTia's Oasis CRM, bringing new features like Web-based access.

Alberta Printer relies on Oasis to manage all customer information, from the printing

equipment they have on site to a full record of past and current support issues.

"It's a valuable tool in supporting existing clients from the point of sale through the full lifecycle," said Helmut Rotter, owner and manager.

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*"Oasis allows us to work off the same page. That improves efficiency and customer response capabilities, saving us money in managing accounts. We have a loyal customer base that we do good work for, and this is one of the things that allows that."*

*– Helmut Rotter, owner and manager*

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As break-fix and other issues come in, Alberta Printer staff log them in Oasis and follow the service ticket through to completion. When technicians complete work orders, the integration with BusinessVision brings customer information over to accounting for billing purposes.

The solution's customizability allows Alberta Printer to tailor fields to capture data in the most relevant way for its workflow. Notes fields in Oasis ensure that every member of



the Alberta Printer staff has a current view of a customer's status – whether there is a support request or billing issue – allowing team members to respond accordingly to customers.

With Web-based access, service staff now update and access customer information from any computer at client sites – keeping customer data continuously current. Likewise, home-based employees use the application without having to install the software on their desktops.

### Responsive, Individualized Service

Having a centralized customer database and support workflow, Alberta Printer enhances the high level of service and support that is the foundation of its success – and does so more efficiently and cost effectively. The integration with BusinessVision eliminates duplicate data entry between the two programs, and has driven real time-savings for the accounting department.

“Oasis allows us to work off the same page,” Rotter said. “That improves efficiency and customer response capabilities, saving us money in managing accounts. We have a loyal customer base that we do good work for, and this is one of the things that allows that.”

### 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.

