

Oasis CRM by KnowTia

Overall Rating

9.33



Product Name

Oasis-CRM™

Reviewed By

Susan Gaswirth
sgaswirth@aol.com

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Summary:

Oasis-CRM™ is designed to interface with QuickBooks products through a server-based application named “InfoLink”. Oasis-CRM™ for Intuit QuickBooks® is a “Total Business Solution” which incorporates the entire business process lifecycle beginning with marketing promotions, capturing sales leads and quarantining them until they are properly qualified, and converting the leads into prospects all with the touch of a button. With the built in quotation generator module you may easily create profitability analyses and commissions to arrive at the desired profitability of a given deal.

Strengths:

Oasis-CRM™ is amazing with many undeniably incredible features that cannot be explored in detail during this review since I am primarily focused on the product as it integrates with QuickBooks. Oasis-CRM™ is browser based and can be easily navigated utilizing the CRM Dashboard. Users can easily connect from remote locations by simply having an internet connection. Remote workers can see the same activity everyone in the office will see, and will be able to update their workflow and sales transactions in real-time processing. There will be no delay of system accuracy due to data synchronization.

Limitations:

I do not necessarily believe this is a limitation, however, users should be aware that this product must run on either Windows 2003 Server with Service Pack 3, Windows 2000 Professional, Windows 2000 Server/Advanced Server, or Windows XP Professional/Server. The server should be a dedicated file server for Oasis-CRM™.

The hardware requirements are well documented and the product is designed to support all types of business from the small 10 person entity to large corporations. However, it is prudent for the smaller companies to be aware of this requirement particularly if cost is a major consideration when making your CRM decision.

Wish List:

Absolutely none, this product does everything.

Product Ratings	Rating																								
<p>Setup and Installation: I did not perform the set up of the application. I did not have Windows XP Professional so Oasis set up the application and sent me a laptop to perform the review. I received a copy of the product documentation, which was impeccably written and easy to follow and believe the steps are so well documented that it would not have been an issue to install the software.</p>	8.00																								
<p>Interface: Oasis-CRM™ is designed to interface with QuickBooks products through a server based application provided with the system named “InfoLink”. Set up of InfoLink is quick and easy, and in order for it to communicate with QuickBooks data files, 1 license copy of QuickBooks must be installed on the Oasis server. The license should remain a dedicated license for the Oasis-CRM InfoLink module.</p>	9.5																								
<p>Features: Oasis-CRM™ includes all of the following features right out of the box with no need to purchase components separately.</p> <table border="1" data-bbox="154 924 998 1470"> <tr> <td>Marketing Lead Capture Web Portal (Unlimited License)</td> <td>Web Based Employee Access Client (Per Seat License)</td> </tr> <tr> <td>Marketing Campaign Manager with bulk transmit</td> <td>Lead Dispatch Center</td> </tr> <tr> <td>Sales Lead Management with follow-up tracking</td> <td>Sales Lead Management with follow-up tracking</td> </tr> <tr> <td>Prospect promotion tracking</td> <td>Robust Quotation Generation with E-mail support</td> </tr> <tr> <td>Sales Funnel & Pipeline Tools</td> <td>Sales Order & Inventory Allocation</td> </tr> <tr> <td>Purchasing & Receiving</td> <td>Customer Invoicing</td> </tr> <tr> <td>Robust Service Contract Management</td> <td>RMA & Product Depot</td> </tr> <tr> <td>Issue Management System</td> <td>HTML Integrated Knowledge Base</td> </tr> <tr> <td>Day/Week/Month/Year Multi-Resource Scheduling</td> <td>Follow-up and reminder tracking</td> </tr> <tr> <td>Customer Self-Service Portal (Unlimited License)</td> <td>Integrated E-Commerce Shopping Cart</td> </tr> <tr> <td>Microsoft Exchange Server 2003 Integration</td> <td>InfoLink Accounting Integration System</td> </tr> <tr> <td>InSight Business Rule Monitor</td> <td>Customizable Source-Code Included</td> </tr> </table>	Marketing Lead Capture Web Portal (Unlimited License)	Web Based Employee Access Client (Per Seat License)	Marketing Campaign Manager with bulk transmit	Lead Dispatch Center	Sales Lead Management with follow-up tracking	Sales Lead Management with follow-up tracking	Prospect promotion tracking	Robust Quotation Generation with E-mail support	Sales Funnel & Pipeline Tools	Sales Order & Inventory Allocation	Purchasing & Receiving	Customer Invoicing	Robust Service Contract Management	RMA & Product Depot	Issue Management System	HTML Integrated Knowledge Base	Day/Week/Month/Year Multi-Resource Scheduling	Follow-up and reminder tracking	Customer Self-Service Portal (Unlimited License)	Integrated E-Commerce Shopping Cart	Microsoft Exchange Server 2003 Integration	InfoLink Accounting Integration System	InSight Business Rule Monitor	Customizable Source-Code Included	10.0
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<p>Ease of Use/Service and Support The product is amazingly easy to use. Customer support is excellent. Product documentation is by far the best I have seen from any off the shelf package, it was clear and easy to follow. KnowTia’s staff is knowledgeable, fast to respond, and are extremely impressive from both a professional perspective and a product perspective. They wowed me.</p>	9.5																								
<p>Data Security Security is determined at both the Oasis and QuickBooks levels. The end-user will only be performing the functions, or have access to the areas that have been defined by the system administrator.</p>	9.5																								
<p>Integration with QuickBooks The product integrates seamlessly with QuickBooks.</p>	9.5																								

Ratings Definitions

10.0 (Perfect):
This exceedingly rare score is reserved for a product that is as perfect as it could be.

9.0 to 9.9 (Spectacular):
A product that receives a rating in this range succeeds at meeting all of its intended users' needs and has no meaningful drawbacks.

8.0 to 8.9 (Excellent):
A product that receives a rating in this range is superior in so many ways that its relatively few drawbacks are not very important.

7.0 to 7.9 (Very good):
While the strengths of a product scoring in this range certainly outweigh its weaknesses, it has some minor faults that certain users should be aware of.

6.0 to 6.9 (Good):
This range represents a product that is above average. Its strengths slightly outweigh its weaknesses, making it good for most uses but not a standout.

5.0 to 5.9 (Average):
A product that scores in this range is functional but unremarkable.

4.0 to 4.9 (Mediocre):
Products in this range are below average. They fall in the middle of the pack for most features, but suffer from a few additional major flaws.

3.0 to 3.9 (Poor):
A customer should probably not consider purchasing a product in this range or lower. There may be one or two specialized circumstances, however, that could justify the purchase of this product for a very low price for a specific demand.

2.0 to 2.9 (Terrible):
A product that receives a rating in this range does not satisfy any of its intended users' needs and has no meaningful strengths.

1.0 to 1.9 (Abysmal):
A product in this range should never have been produced. This product has no redeeming qualities and worse, may actually harm the user or the user's productivity.