



SOLUTION BRIEF

Customer Profile

OAISYS is a premiere developer of interaction management and voice documentation solutions for small-to-medium-sized businesses. Its solutions help companies attract and retain customers by digitally capturing customer interactions for simple retrieval, playback and management through intuitive interfaces to fit various users' needs.

OAISYS' solutions integrate with leading telephone systems to provide a communications solution that enables companies and employees to communicate more quickly, easily and efficiently.

Business Situation

Using manual, error-prone data entry for accounting and customer management, OAISYS needed a way to better manage inventory and returns management, better financial and sales reporting.

Solution

- > Microsoft Dynamics GP
- > Microsoft Dynamics CRM

Business Benefits

- > Eliminated manual, error-prone data entry
- > Automated inventory and returns management
- > Improved visibility into VAR sales channel
- > Better sales reporting and real-time access to data
- > Centralized customer contacts

Industry

Business Services, Software

ePartners Success Story

OAISYS talks business automation with Dynamics GP and CRM



Imagine calling your bank only to be placed on hold for five minutes, and when your call is finally picked up, you get on the line with someone who gives you nothing but bad customer service. OAISYS helps eliminate these types of calls. The company

provides telephony solutions that automatically record, store and organize telephone conversations in a central, secure server. These calls are then used for training purposes, employee evaluation, information exchange and dispute resolution, ensuring that your next customer service call is quick and effective.

In addition to helping companies acquire and retain customers, OAISYS' solutions encompass interactive voice response (IVR), intelligent call routing, digital call recording, desktop call control, screen pops, and automatic call distribution (ACD). OAISYS' customer base includes financial services organizations such as First Republic Bank and Wells Fargo Home Mortgage, who are required by law to record every conversation, as well as companies with a keen eye on customer service including Waste Management, Roto Rooter Plumbers and Discount Tire Direct.

Limited by its use of Quickbooks, OAISYS needed a way to develop and customize financial reports, and manage inventory and returns management. Although sales force automation was not originally part of the project scope, OAISYS quickly identified the need to centralize customer contacts, gain better sales reporting and gain real-time access to data. "At OAISYS, our 'feet on the street' is our channel of resellers," says Doug Ames, Operations Director. "We needed to equip our regional sales managers to help the resellers close the deal."

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Solution

OAISYS deployed Microsoft Dynamics GP and CRM as its integrated ERP system, and immediately saw benefits. "With Quickbooks we were maxed out at five users, so to be able to have Accounting in the new system processing invoices, while at the same time the executive team could take a look at financial reports was an immediate win," says Ames.

Using Dynamics CRM with Dynamics GP as the information backbone has given sales and finance better visibility and better reporting capabilities. Using SQL Server Reporting Services, OAISYS can now easily create reports on their sales reps and resellers by region and productivity. "For example, if one of our resellers closed a deal but spent \$1,000 on expenses, we can deduct that amount and determine gross profit by reseller," says Ames.

Another benefit of Dynamics CRM is the real-time access to data. "As with most companies, the last two days of the quarter are the busiest for us," says Ames. "In operations we could barely keep up with sales to report back to them what deals had come in." Now, when orders are received and keyed into Dynamics GP, sales can go in and see who ordered what and analyze to determine if it is more or less than their forecast. The new process has eliminated surprises, especially in managing an indirect sales channel.

OAISYS eliminated several manual processes with the integrated Dynamics solution. "We are like kids in a candy store with the increased functionality," says Ames. With Quickbooks, OAISYS had to hand-key the same information in three separate times to generate a purchase

order, packing slip and invoice. With Dynamics GP, they only key the information in once and it generates all of the information from one source. "I would say we went from about 15 minutes of manual data entry down to only 1-2 minutes per order," says Ames.

Previously, OAISYS was managing returns management on paper—a manual and error-prone process. The company now scans serial numbers directly into Dynamics GP for returns management. Information is available at the click of a button, including what returns are outstanding and when they are due to arrive. The support team can get involved and get a new unit in place at the customer, or if a replacement has been shipped, accounting can process an invoice.

Integration

Since OAISYS is in the business of communicating, it has integrated its own "screen pop" capabilities into the Dynamics CRM solution. When a customer calls, the phone number is queried out in Microsoft CRM to pop up a screen with information detailing the last time OAISYS spoke with them.

Future plans

"We viewed this project as a new foundation for process improvements moving forward," says Ames. "We can now develop new business, add people, and have a notable baseline for comparison."

OAISYS has plans to add Business Portal functionality to the system to extend their ability to share business-critical information, reports, and better collaborate as an organization.



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