

Sage ERP Accpac Becomes the Right Ticket for Telaid

Telaid Industries is a telecommunications integrator that offers multilocation enterprise companies technical products and services. Products range from structured cabling, AV communications, and phone systems to Hoot 'N' Holler/Squawk networks, speech privacy, wireless systems, and call accounting. Services include AV design and build, network staging, and deployment, as well as on-site technical staffing. Founded in 1981, Telaid focuses on large multilocation rollouts, and 24/7 service and support to more than 35,000 customer locations nationwide. After several years of using Sage ERP Accpac as an accounting system, Telaid felt it needed to increase the efficiencies of its business processes through integrating SageCRM.

Efficiently Streamlined Nationwide Tech Dispatching

Prior to implementing SageCRM, when something would go wrong with a customer's store cash register, POS terminal, or TV in the electronics department, the customer would call Telaid. Because the Telaid Service Groups were using disparate pieces of software, if one group was working with a customer, the others might not know it. Duplicate dispatches were going out for technicians who could have solved two or three trouble tickets on the same call instead of going back each time, costing Telaid time and money.

"We formed an Implementation Team of key employees who were going to be affected most in using these tools," says Scott Hurley, Telaid general manager. "They helped to refine and change the old work processes so that the tools would fit the new work processes. We compared software, vendors, and eventually agreed on SageCRM. The ability to integrate was an important factor."

Telaid needed a customized version of SageCRM, which meant also customizing the integration with Sage ERP Accpac. SageCRM provided customization tools and an open architecture that greatly reduced development and maintenance costs and allowed seamless integration. The business partners consolidated the entire system, creating a customized locator that searches subcontractors across the country. It identifies the right Zip code, skill set, and work rate to service an account. SageCRM can also assign the job and create work/purchase orders needed to coordinate the entire job, which go from SageCRM, out to the field, back to SageCRM, and to Sage ERP Accpac.

Customer

Telaid Industries, Inc.

Industry

Video and communications

Location

Niantic, Connecticut

Number of Locations:

22

System

Sage ERP Accpac
SageCRM

- Accounts Payable
- Accounts Receivable
- General Ledger
- Inventory Control
- Order Entry
- Purchase Order



Challenge

Prevent time and revenue loss due to duplicate dispatching of 24/7 technician service and support for more than 35,000 customer locations nationwide.

Solution

Customized integration of SageCRM with Sage ERP Accpac to keep service groups informed about who is servicing which customer at any given moment.

Results

Dispatch duplications eliminated with more overall efficient handling of trouble tickets.

As the rollout continues, there are 50 users with plans to expand to 90. Alex Ivins, Telaid service desk manager, says “SageCRM is a big improvement for working a case through the process to the end. We have customer service groups here in Niantic, Connecticut; Denver, Colorado; and Madison, Wisconsin. They can collaborate on any particular case with continuity, especially during after-hours support. And employees working from home can access this data through the web, putting us all on the same page.”

Web Self-Service Eliminates Having to Telephone Telaid

“Another one of our objectives was to have a CRM web self-service portal for our customers to enter service requests, without having to call us on the phone,” remarks Ryan Todd, IT manager. “This allows our customers to process their own cases and check status. SageCRM has absolutely helped us to do this. It automatically opens a case in our system, and the analyst here can work the case accordingly, dispatch a technician, and then update the case. The customer can print their own report based on their preferences, requests and history through the customized fields they want to see. With 1,100 cases in our first six months, it’s one of our biggest benefits from SageCRM.”

One of the Most Telling Qualifications in Telaid Winning Contracts

The process of winning contracts is changing from forming a relationship with one decision-making manager at the IT or facilities telecommunications level to a very involved qualification process administered by bottom line-oriented procurement and legal professionals. Unlike the one decision-making manager, the procurement and legal professionals are under increasing corporate pressure to decrease the expenditures of goods and services from vendors and suppliers. IT services normally supplied by several different vendors under separately negotiated contracts are being replaced by a trend toward bundling everything with one vendor under one Master Purchase Agreement. “Qualifying as a vendor involves a vigorous due-diligence process. We are required to supply very

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detailed information about our company infrastructure, processes, and capabilities for accommodating specific customer cost-saving needs. We’re seeing an increase in RFI questions about our having the capability of allowing the customer to integrate invoicing or billing to our accounting system, as well as electronic fund transfer. Without Sage ERP Accpac, we could not compete,” acknowledges Scott Hurley.

About Sage North America

Sage North America is part of The Sage Group plc, a leading global supplier of business management software and services. Sage North America employs 4,000 people and supports 3.2 million small and mid-sized business customers. The Sage Group plc, formed in 1981, was floated on the London Stock Exchange in 1989 and now employs 13,400 people and supports 6.3 million customers worldwide. For more information, please visit the website at www.SageNorthAmerica.com.