



by FIELDPOINT

Fast Growing Full Service Technology Firm

Managing customer service calls, contracts, and projects better

“With the addition of Alert Software and QuickBooks we can manage our service calls, contracts, and projects more efficiently. Alert’s tracking capability ensures that nothing is overlooked.”

Myriam Martinez
Services Manager
Axispoint



Technology, Experience,
and Know-How to Deliver
Custom Solutions for Your
Business

SUCCESS STORY

Axispoint

AT A GLANCE:

Customer:

Axispoint, Inc.

Location:

New York, NY

Industry:

Technology Solutions

Business Challenge:

Managing customers and tracking resources in a high growth business

Solution:

Implementing an integrated service operations system with QuickBooks.

Results:

Marked improvement in resource utilization, schedule management of mobile workers, and invoicing.

Customer Profile

Axispoint is a full service technology solutions company focused on providing their clients innovative software and network solutions.

The company combines the ability to solve complex technology problems with the philosophy of highly attentive customer service and strong client satisfaction.

Due to this specialized focus, Axispoint has achieved one of the highest rates in the industry for both growth and client retention.

Business Challenge

With Axispoint’s strong commitment to customer service, managing site visits and project status is extremely important.

The company previously used a public Outlook Calendar to manage each engineer’s time. This process created duplicate calendar entries. Any emergencies or changes in the schedule presented a major organizational challenge for the entire project management team.

As the company grew, it became more difficult to successfully manage their client base using their existing system. All customer data was stored in QuickBooks, while scheduling was performed using Outlook. There was no cohesive way to track timesheets, schedules and projects.





Solution Overview

Axispoint required a system that would share information across both QuickBooks and Outlook systems. Alert Software by Fieldpoint provided this integration, as well as some additional functionality.

- Service requests are entered and resources are scheduled in Alert. Engineers can now access the most updated appointment information easily whether they are in the office or at a customer site.
- Alert’s timesheet capability allows engineers and project managers to enter their hours only once, instead of re-entering information into multiple systems.
- For completed and closed service calls, Alert generates an invoice that automatically posts into QuickBooks, allowing for seamless integration between the scheduling and billing departments.

Business Benefits

With the addition of Alert Software, Axispoint can manage their service calls and projects more quickly and efficiently.

- Axispoint has realized over a 20% improvement in resource utilization. Tracking everything through Alert can ensure that nothing is overlooked.
- The company has experienced a 50% reduction in time needed to validate and generate invoices, allowing for Axispoint to continue their growth without a substantial increase in administrative headcount.
- Alert Software’s reporting capability allows Axispoint to track services and invoices more closely, and make the right maintenance agreement recommendations for their customers.

The Alert Software offering brings more efficiency to Axispoint, and helps the company reaffirm their strong commitment to each of their customers.

“Alert Software has helped to enhance our service offering and allows us to continue to deliver superior service to our customers.”

Frank Scanga
EVP
Axispoint

FOR MORE INFORMATION VISIT:

Fieldpoint Service Applications Inc.
www.fieldpoint.net

Quick Books
www.quickbooks.com

Alert service software by Fieldpoint and QuickBooks Financial Software work together to help simplify your business management. QuickBooks 2007 Financial Software helps you get more done faster, with a new Home page, simplified Customer and Vendor Centers, and sophisticated business planning tools.

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