

## Source Technologies Centralizes Sales and Customer Data With Help from ADSS Global

### CUSTOMER

Source Technologies Inc.

### INDUSTRY

Hardware & Software

### LOCATION

Charlotte, North Carolina

### SYSTEM

SageCRM

Sage Accpac ERP

Based in Charlotte, North Carolina, Source Technologies Inc. is a longtime Sage customer and a leading provider of Magnetic Ink Character Recognition (MICR) solutions used by a wide variety of businesses and financial institutions to encode the checks they print. Originally a hardware solutions provider, Source Technologies recently developed and began selling a Web-based software product that enables customers to print checks remotely while maintaining centralized control. The new software sales strategy significantly increased the complexity of its sales process.



“When we added software to our product offerings, we realized that we could increase the efficiency and effectiveness of our sales efforts by centralizing sales and customer data,” recalls Tim Baker, Source Technologies’ director of information systems. “Until that time, this type of information was not shared across our enterprise and we wanted to start duplicating complex software solutions to multiple customers. Data sharing also became essential.”

### Sales Force Automation and Much More

To initially resolve this issue, Source Technologies implemented a sales force automation solution. But it quickly came to realize a critical shortcoming typical of this type of system: beyond the sales process, these dedicated products do not support centralization of customer data that can be used to improve service throughout the entire customer relationship, from sales through support and even through collections.

### CHALLENGE

Source Technologies needed an up-to-date, scalable accounting and CRM solution that could handle detailed project accounting, complex sales orders, and sales data tracking and management.

### SOLUTION

SageCRM integrates with Sage Accpac ERP and provides sales and customer service representatives with easy Web-based access to comprehensive data about prospects, customers, and products.

### RESULTS

With Sage’s integrated solution, company earns immediate investment return with improved customer service, forecasting accuracy, and inventory control.

*"SageCRM continues to meet our requirements by providing our entire enterprise access to the data needed to close sales, satisfy customers, and build long-lasting relationships."*

## ADSS GLOBAL

ADSS Global is a leading global partner for Sage Software with over 60 certified professionals in locations in the East Coast, West Coast, Gulf Coast, Caribbean, Canada, and in the Czech Republic.

ADSS Global provides service to over 1,200 companies in more than 20 different countries. Our mission is to provide clients with advanced financial software, eBusiness solutions, Customer Relationship Management (CRM) and network infrastructure.

Our combined experience, proven methodologies and shared national resources ensure customer success on every level. Implementing enterprise solutions and providing support through a local presence, ADSS Global is responsive and accessible to the varied and sophisticated needs of our customers.

"We wanted to give everyone in our company access to a consolidated customer record that contains up-to-date information about any given customer and all of his contacts with us," Baker says. "We knew that if we could centralize all of this information, we would be able to increase service levels, optimize sales force efficiency, improve forecasting accuracy and inventory control, and streamline just about every other business process."

### Instant Return on Investment

Source Technologies considered several solutions and ultimately selected SageCRM. "We have relied on Sage Accpac ERP accounting solutions for over a decade and have always been satisfied with their products and services, so Sage was a natural choice," states Baker.

In fact, the company presently employs an in-house Sage certified consultant originally employed and trained by ADSS Global, Source Technologies' longtime Sage Authorized Partner. "But the real clincher was the out-of-the-box integration between Sage Accpac ERP, our accounting solution, and SageCRM. With no integration expense, this solution actually paid for itself as soon as we opened the box."

"Source Technologies recognized the potential of SageCRM as a key element

to integrate and optimize its business systems," says Ray Jennings, managing partner with ADSS Global.

Indeed, integrating its CRM and accounting solutions provided Source Technologies the capability for swift and comprehensive responses to virtually any customer inquiry—from order status to progress reports to accounts receivable data. Integration also facilitated accurate forecasting of inventory information.

Additionally, every Source Technologies employee now has access to a shared database containing customer contact information and employee calendars.

"With SageCRM, we have real-time access to information about any aspect of our business," says Baker.

"The bottom line is that SageCRM has fulfilled our initial needs for the centralized creation of an all-inclusive customer database," concludes Baker, "and continues to meet our requirements by providing our entire enterprise access to the data needed to close sales, satisfy customers, and build long-lasting relationships."

"Source Technologies is a prime example of a very productive company successfully implementing Sage integrated applications."

Whiteland Business Park  
825 Springdale Drive  
Exton, PA 19341  
484.713.1000  
484.713.0077 fax

Sunset Station  
5975 Sunset Drive  
Suite 505  
Miami, FL 33143  
305.665.3655

info@ADSSGlobal.net  
www.ADSSGlobal.net

