IT Genie Limited

Computer Support and Microsoft CRM

IT Genie Limited is a rapidly expanding technical support company with 14 staff based at two sites (in Crawley and Aylesbury) servicing SME's across Sussex, Surrey, South London, and Buckinghamshire.

IT Genie have invested in Microsoft CRM and associated technologies and plan to become Microsoft Gold Partners to take advantage of the 25 CRM licenses that are made available with this program. IT Genie are also Sage resellers and use **Sage Line 50** for all their invoicing and accounting activities.

Pat Hastings approached several companies for some help in improving the usability of CRM for customer support purposes. He selected **redware** after seeing a demonstration of the SYNC CRM Connector for **Sage Line 50** which allows invoices to be created in Sage from CRM Sales Orders without re-entering any information.
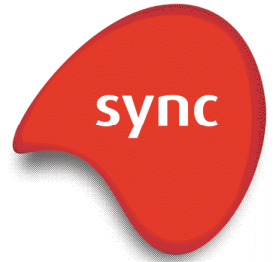
IT Genie use CRM for all their sales and customer support activity. The helpdesk has been hampered by usability issues which make it difficult to schedule an appointment with an engineer whilst the customer is on the telephone. Redware designed and implemented a **custom intranet web page,** with all the required information collated together, so the helpdesk staff can now schedule an appointment easily and efficiently whilst talking to the customer over the telephone.

The **SYNC CRM Connector for Sage Line 50** was installed to ease the sales process by synchronising the CRM product database with Sage and to allow invoices to be created automatically in Sage without re-typing.

IT Genie is moving on to the next stage of the project with information on billable activity collated from the service activity records to monitor support contracts and automatically bill jobs to customers as required. The business model for computer support contracts requires complex recurring monthly billing which is difficult for Sage to handle and IT Genie is considering buying into the billing technology already developed by redware for Sage Line 50 to further automate their business.

Please email **sync@redware.com** or call Stamati Crook on **0845 3010 444** with your consultancy requirements for Microsoft CRM. We also publish the Microsoft CRM 4.0 User Handbook and software add-ons for CRM including accounting integration, mobile text messaging, telephony, and company credit checking functionality.

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