

Results & SmartVault Streamline Operations

Case Study: DAILY BALANCE

ABOUT DAILY BALANCE

Daily Balance provides high quality, low cost bookkeeping solutions for a wide variety of companies and not-for-profit organizations across the country. The Daily Balance team is made up of highly trained and motivated professionals that provide businesses an online, outsourced bookkeeping solution alternative to an in-house full-charge bookkeeper or accounting department.

CUSTOMER

Daily Balance

INDUSTRY

Bookkeeping Services

KEY CRM NEED

Needed to capture business correspondence & standardize business processes.

RESULTS PRODUCT

CRM Business Suite & SmartVault Integration

BUSINESS CHALLENGES

Centralized Correspondence. Daily Balance needed to centralize customer correspondence so that they could easily reference documents, emails and notes.

Standardized Processes. Daily Balance would spend hours recreating the wheel and needed to standardize processes and easily retrieve the templates they used.

Synchronized Contact Information. The company was spending too much time updating various databases with contact information.

WHY RESULTS?

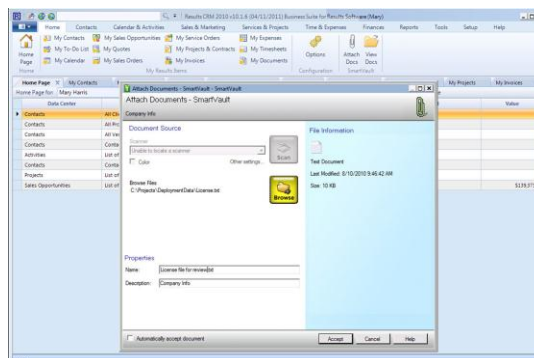
SmartVault Integration. Daily Balance has set up automatic processes in Results. Users have direct access to SmartVault documents (letters, checklists, and templates) from within Results as they move through the process.

Communication Hub. All employees depend on the information in Results and know it will always be fresh and reliable. Results has given the company the peace of mind that all important communications are captured within one central database.

Duplicate Record Checks. Results CRM not only lets you search for potential duplicates but warns you of potential duplicates as new records are added.

FAVORITE RESULTS FEATURE

Daily Balance uses the *Activate a Process* feature in Results to trigger the business processes they have customized for their organization. Using the Results SmartVault Integration module in Results, users are able to easily access templates, letters, and the other SmartVault documents they need at each step of the process.



"The Results SmartVault Integration is quite seamless. We are able to drop documents in SmartVault and have them immediately available to all Results users. We have streamlined our business processes and know Results information is always fresh and reliable."

Syd Highly
Daily Balance