



# Vista Information Systems organizes and grows with ServiceSidekick

*Harnessing the power of ServiceSidekick + QuickBooks*



*"We have a quota of how many hours a week a technician must bill and ServiceSidekick saves us at least 10 hours a week in tracking and recording job time and determining how efficient our techs are...."*

**Justin Harrison**  
VP of Development  
Vista Information Systems

### Customer Profile

Vista Information Systems is a privately owned IT company specializing in systems integration, web development, and telephony solutions for small to medium sized businesses.

### Business Challenges

Already adept at helping other businesses succeed through leveraging internet technologies, Vista Information Systems decided to reevaluate their own internal IT systems in 2007.

Vista Information Systems had long used QuickBooks for accounting. Over time more and more employees were granted access to QuickBooks in order to manage customer information for scheduling, sales, and estimating. But without proper scheduling, dispatching and task management features and lacking easy remote access, QuickBooks made managing these workflows tricky.

Microsoft Outlook was also used internally to keep calendars for each tech but this system involved tedious cutting and pasting job information between the QuickBooks and Outlook.

Knowing the benefit that would come from finding a true "all-in-one" solution for their standard service workflows, Vista Information Systems decided to build their own custom web-based solution.

### Solutions Overview

"We wanted an all-in-one application were we could manage all of our operations...", says Justin, VP of Development, "I actually stumbled upon ServiceSidekick while I was researching doing the QuickBooks integration ourselves".

Justin was immediately relieved to find a robust, web-based offering for service businesses by a certified QuickBooks developer.

### SUCCESS STORY

*Vista Information Systems*

### AT A GLANCE:

#### Customer:

Vista Information Systems

#### Location:

Birmingham, Alabama

#### Industry:

Systems integration, web development, and telephony

#### Business Challenge:

Running a fast growing business with multiple systems required an enormous amount of time and was error-prone.

#### Solution:

ServiceSidekick and QuickBooks

#### Results:

- 10 hours/week time savings
- Eliminated double entry
- Increased customer satisfaction
- Increased employee & field technician productivity
- Increased professionalism





## SUCCESS STORY

"We really like the fact that ServiceSidekick is web-based so we can access it anywhere. And it's software as a service which means we can pay monthly without a huge cost upfront."

After determining that the QuickBooks integration suited their needs, Justin began to evaluate other crucial features such as group calendaring and task management. He quickly realized that ServiceSidekick already supported key features he and his colleagues needed to rollout a true "all-in-one" solution.

Now jobs are scheduled directly into ServiceSidekick. The daily workflow starts at the morning kickoff meetings where the field techs are given a printout of their work orders and tasks for that day. The work is performed and the next morning the techs come in and enter job notes directly into ServiceSidekick. After the meeting an admin assistant enters the techs hours from these notes, approves the job, and syncs with QuickBooks.

Without any double entry, Vista Information Systems now has a completely accessible knowledge base of customer and job history, technicians, and seamless integration with QuickBooks.

"We develop many similar products that are all web-based," Justin explains, "so ServiceSidekick was easy to start using...and the integration that it allows with QuickBooks helps out a lot!"

### Business Benefits

Beyond the time and cost savings of using multiple systems plagued with double entry, the ServiceSidekick solution offered other tangible benefits. Justin explains, "Notifying a tech already onsite with a customer of another job is tricky... a phone call interrupts the work being done and isn't courteous to the customer. Using ServiceSidekick we can notify the tech via email so they can get the info without disturbing the relationship of the current customer. That has been a big help."

Using ServiceSidekick to track each field technician's efficiency on a weekly basis has allowed Vista Information Systems to continue to grow. "We have a quota of how many hours a week a technician must bill... and ServiceSidekick saves us at least 10 hours a week in tracking and recording job time and determining how efficient our techs are...", says Justin.

*"We really like the fact that ServiceSidekick is web-based so we can access it anywhere. And it's software as a service which means we can pay monthly without a huge cost upfront."*

**Justin Harrison**  
**VP of Development**  
**Vista Information Systems**

## FOR MORE INFORMATION VISIT:

**ServiceSidekick**  
<http://www.servicesidekick.com>

**Quick Books**  
[www.quickbooks.com](http://www.quickbooks.com)

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