

Datagate integrations with ConnectBooster, ConnectWise and QuickBooks Online create VoIP billing and payments machine

“It was really easy to integrate Datagate to ConnectBooster, QuickBooks Online and our other systems.”

Bob Bascom | Founder, Charleston Telecom Solutions



US VoIP service and systems provider Charleston Telecom Solutions has used Datagate’s integrations with ConnectWise, ConnectBooster, QuickBooks Online and CCH SureTax to create an ‘automated billing and payments machine’ that runs itself.

Charleston Telecom customers log into their regular ConnectBooster portal to see all of their bills, pick which invoices they want to pay, and make a single payment. The Datagate/ConnectBooster integration means that when a customer clicks on a Datagate bill inside ConnectBooster they see the professional, easy-to-understand PDF bill produced by Datagate.

“The unified portal is simple and convenient for customers,” says Bob Bascom, Founder, Charleston Telecom Solutions.

“It’s a seamless experience – customers don’t even know that Datagate and ConnectBooster are different platforms.”

Datagate’s integrations with QuickBooks Online and ConnectBooster let Charleston Telecom see all invoices in both QuickBooks Online and ConnectBooster, with accurate accounting on what is paid and taxes owed.

Charleston Telecom uses Datagate to bill the hosted VoIP services that make up the majority of its business. To bill one-off projects such as cabling, surveillance cameras and labor, it uses ConnectWise. Most customers have a credit card on file, or have enabled ACH payments for hosted services, but in the past Charleston Telecom couldn’t use the card or ACH to take payments for one-off jobs. Lack of integration meant the

invoices weren’t in both systems – but now they are.

“The Datagate/ConnectBooster integration gives our customers a smoother service experience,” Bob Bascom says.

Charleston Telecom emails VoIP invoices from inside Datagate to the customer. It sends payment reminder emails from ConnectBooster that let the customer click to see invoices and make payments.

“The integration between Datagate, ConnectBooster, ConnectWise, QuickBooks Online and CCH SureTax lets us see all invoices and taxes in QuickBooks Online or ConnectBooster.”

Bob Bascom | Founder, Charleston Telecom Solutions

Charleston Telecom had billing challenges with its old provider due to lack of integration. When a new customer called, the company would put the details into ConnectWise and dispatch off that. Then it would have to re-key all the information into the old billing platform. Now it simply changes the classification of the customer in ConnectWise to ‘Datagate

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customer' and the information flows automatically into Datagate.

The old telecommunications billing platform did not integrate with QuickBooks Online, so Charleston Telecom could not use QuickBooks to see who owed money. It had to do a manual deposit to get a payment into QuickBooks. When a customer paid by check, Charleston Telecom had to do a double manual entry into both the billing platform and QuickBooks Online. A distraction could mean a payment was received in one system but not the other. This caused some embarrassing moments with customers, says Bob Bascom.

"We cashed a customer's check and then sent overdue payment reminders. The customer payments portal on our old billing platform also sometimes crashed in the middle of payment.

"It's a seamless experience – customers don't even know that Datagate and ConnectBooster are different platforms."

Bob Bascom | Founder, Charleston Telecom Solutions

A customer tried twice then gave up, and was debited twice with no acknowledgement by the billing platform. That was highly embarrassing.

"With Datagate, the data is accurate and the checks and balances are strong. Before, when money entered our bank account you couldn't see if there was a mistake without doing a lot of tracing work. With ConnectWise and Datagate, each deposit has a transaction number and it's easy to trace and audit payments. It's so much easier to receive payments and match them with QuickBooks Online. And I can see real-time accounts receivable."

Charleston Telecom is a SkySwitch reseller. Bob Bascom met Datagate at a SkySwitch Vectors conference just before SkySwitch became a Datagate reseller.

"SkySwitch is a great company with excellent product and support, I have nothing but good things to say. It was really easy to integrate Datagate to ConnectWise, QuickBooks Online, ConnectBooster and our other systems. Datagate's back-end saves us a ton of time. We have built an automated machine that runs itself. We are not reliant on any individual. Very importantly, our customers can trust the accuracy of this system. I would recommend Datagate."

Highlights

SUMMARY

Datagate's out-of-the-box integrations with ConnectWise, ConnectBooster, QuickBooks Online and CCH SureTax have created an 'automated billing and payments machine' at Charleston Telecom.

Customer information from ConnectWise flows into Datagate automatically. ConnectBooster integration allows customers to see and pay their Datagate bills from inside ConnectBooster. Charleston Telecom can view all of its invoices in both QuickBooks Online and ConnectBooster, with accurate accounting on what is paid and taxes owed. Each bank deposit has a transaction number that makes it easy to trace and audit payments. A Datagate synch with CCH SureTax Tax calculates compliance and regulatory fees for customer accounts across different states automatically.

BUSINESS BENEFITS

- ▶ Integration with ConnectWise
- ▶ Integration with ConnectBooster
- ▶ Integration with QuickBooks Online
- ▶ Integration with CCH SureTax
- ▶ No manual inputs or re-keying
- ▶ Huge time savings

KEY OUTCOMES

- ▶ Automated 'billing and payments machine' runs itself
- ▶ Accurate and trustworthy
- ▶ Seamless customer experience

ABOUT CHARLESTON TELECOM SOLUTIONS

Charleston Telecom Solutions is a hosted VoIP provider. It helps small to mid-size businesses improve customer experience and company productivity through sophisticated hosted VoIP service and systems that are easy to use. Specialities include business telephone systems, telephone and computer wiring for new constructions or existing structures, data networking, overhead music and loudspeaker paging systems. See: www.charlestantelecomsolutions.com

For more information

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