



nerd911

NERD 911

INTEGRATION SUCCESS STORY

Nerd 911



About Nerd 911

Nerd 911 are the IT consultants with 40+ years of experience and a proven track record of helping people solve technical issues. A team of tech-savvy nerds who have been setting some industry benchmarks since 2007. Headquarters: Denmark

Headquarters:
Copenhagen, Denmark

Industry:
IT

Complexity:
Low

Products and services:
IT consultants on networking design, hardware recommendations and troubleshooting, malware removal, remote and on-site help desk support, etc.

Website: <https://www.nerd911.dk/>



Very happy with Cloudify to date. Seen a significant improvement in business revenue, as well as productivity of employees. Business revenue, as well as productivity of employees.

Regina Lau
Senior Manager, Nerd 911

The challenge

Arne Aksel needed help with saving time and resources that were being used in manually carrying out processes like creating invoices, sending them to clients, creating orders, accepting payments, and shipping them. They were also looking forward to develop their webpage as per the specific designs and requirements of their business.

Thus, Arne Aksel needed help with:

- **Fetch, update, create deal:** Pipedrive deal creation from all information from the configurator.
- **Invoice creation in e-conomic:** Automatic invoice creation in e-conomic whenever there is a deal created in the Pipedrive CRM.
- **Quote creation in e-conomic:** When a customer is added in Pipedrive, create a quote in e-conomic and update the quote number in Pipedrive. This quote can be converted to invoice from Pipedrive.
- **Sync customers in Pipedrive:** When a deal is won in Pipedrive, the customer details are updated in the app.
- **Order creation in Katana:** When a deal is won in the Pipedrive, an order is created for the customer in Katana and also shipped through webshop.

The solutions

Our SaaS experts deeply analysed their business requirements before making the integration. The goal was to make something scalable and easy to use. There were multiple meetings before getting started with the project where we talked about all the issues that they have been looking at on all levels.

We began with integrating Configurator, Pipedrive, Katana and e-conomic followed by building custom work processes according to their business needs.

We set a configurator in Lighthouse for Arne Aksel. From there, the client can create a new deal which leads to the creation of a new deal in Pipedrive.

A deal in Pipedrive leads to the creation of an invoice in Economic and updates Pipedrive deal with the draft invoice number.

The trigger from Pipedrive when a deal is won leads to the creation of sales orders in the Katana app and updating of the Pipedrive deal with the Katana order link.



Visma e-conomic + Syncro integration

We began with integrating e-conomic, and Syncro followed by building custom work processes according to their business needs.

The results

- Time saved and money saved which was spent on manual processes.
- The automation made the whole process efficient and diligent.
- The process became scalable, no matter what the number of leads won or deals created automatically.
- Streamlined processes with no scope for human errors.
- Automated complex workflows for the smooth functioning of business processes.

Automations delivered - SaaS apps that helped Nerd 911 grow:

- E-conomic – The accounting app was integrated to generate invoices and automate invoicing as well as sync customer details.
- Syncro - Syncro is an RMM alert app that lets the business manage a profitable MSP.

Here are the workflows:

Invoice creation in e-conomic for booked invoices

Automatic booked invoice creation in e-conomic whenever an invoice is sent to their customers. To make this easy and traceable, the invoice numbers are renamed in Syncro with the same invoice number in e-conomic.

Syncing customers in e-conomic with Syncro MSP

When an invoice is made in e-conomic it is essential that the client additionally gets made in Syncro MSP precisely. Then we refreshed all customers in Syncro with their indistinguishable client numbers in e-conomic.

Matching up products in e-conomic from Syncro MSP

When an invoice is made and the product doesn't exist in e-conomic, it must be made in e-conomic. Again, this needed to be automated.



Register for an exclusive demo from our experts

See for yourself a quantitative measure on the benefits you receive through process automation with Cloudify. Check out our process calculator [here](#)

[Schedule a demo](#)