

PaydayPERX

PaydayPERX exists to forge profitable partnerships between employers, payroll providers, advertisers and printers by delivering beneficial offers to employees inside the corporate border.

Founded in 2001 as ChekAds, they got their start printing local offers on local business payroll checks in Central Ohio on a small scale, but very rapidly gained the attention of regional employers who liked the idea of getting great discounts for employees and at the same time, getting a huge price break on their payroll check stock costs.

Growing those relationships led them to larger and larger printing partners, and through them were able to help even more regional and national businesses reduce a fixed business cost while bringing desirable discounts on national brand products and services to every employee.

Combining the power of Salesforce and Quickbooks to manage order processing

Challenge.

As PaydayPERX steadily grew, so did the types of the services they offered. These new services increased the complexity in handling their customers orders, and the production schedule report was maintained manually. Although PaydayPERX was using Salesforce to track some elements of their orders, data entry was doubled and tripled as the same information was entered in to Salesforce, Excel, and Quickbooks. These manual processes relied heavily on direct communication and was not scalable. Late delivery is not an option for PaydayPERX payroll and tax products. Unfortunately, late invoicing had become the norm.

Solution.

When PaydayPERX upgraded to the Enterprise version of Salesforce, they had access to broader customizations, but nothing in the Salesforce App ecosystem came close to meeting their needs. Mapsys not only created a seamless, configurable connector between Quickbooks Online and Salesforce, but also combined it with significant customization and APEX class coding across nearly every object. The result is a true end-to-end SMB revenue lifecycle platform, from pre-prospect to quote to order, through invoicing, commissions, and payables across dozens of product lines. The solution includes custom production schedules populated by order line items that display present and future availability in real time for all salespeople. Quickbooks handles the billing and Salesforce provides the logic and data, and its robust reporting engine can access every event and data point along the way.

Results.

- Massive productivity boost
- Production at-a-glance
- No more spreadsheets of data
- Configuration flexibility
- Data to drive decisions
- Bottlenecks exposed
- Overbooking eliminated
- Forecasting actually forecasts

“Small businesses can’t afford to implement high-end ERP solutions, but we still need the same features at a smaller scale – accounting, distribution, and production management. Our company was unable to effectively manage revenue with Salesforce in one silo and Quickbooks in another, along with a mess of spreadsheets, old emails, and scraps of paper. Mapsys was able to leverage our existing investment in both systems to deliver something markedly better than either alone, rather than forcing us to rip and replace with something else brand new that wouldn’t come with the pedigree of either.

--Dana Bromberg, CEO

“This integration is huge for us in the trenches. Having the data available for prospecting, orders, invoicing and payables without constantly needing to get salespeople on the phone saves so much time and reduces mistakes, and the ability to turn accepted quotes into invoices at the click of a button translates to faster invoicing, better cashflow management, and more time to spend on growing the business -- rather than constantly scrambling just to keep up with it.”

--Stephanie Sebring, Sales Coordinator