The XData API was released in June 2010 and is updated as required to meet customers needs. Learn more about the API on our website at:

xdata.xactsoftware.co.nz

Have a read of a couple of our other API case studies:

SNAFFLE JOBS AND XDATA –
the perfect match

Snaffle is a new job matching website in New Zealand that is launching in May 2013, Snaffle aims to put potential employers and applicants together. Applicants and Employers both create a profile filling in the required fields then Snaffles ingenious system matches the job requirements with the most suitable candidates. Any applicant that meets a job's criteria is ranked accordingly and Employers have the opportunity to purchase the profile.

Using the XData API when an applicant or Employer creates a profile on the website a new contact is automatically created in ACT! with those details. The API is then used to record and track certain website usage in ACT! such as when a user updates their profile, when an Employer lists a new job, and when an applicant's profile is purchased by an Employer. Any email notifications that are sent from the website to end users are also flagged against their record in ACT!

Through integrating their website with ACT! via the XData API, Snaffle benefit from a streamlined solution and do not have to account for the overhead associated with managing duplicate data in multiple locations.

KAFFEE ESPRESSO –
service on the go

Kaffee Espresso is a New Zealand owned company that specialises in free on loan self-serve, automatic coffee machines for the workplace, cafe, school lunch room, service stations and the office.

Having already used ACT! to manage their customers, service contracts and machinery via a custom solution Kaffee Espresso wanted to enable service technicians to record details of their service jobs at the customer's site and have the data pushed to ACT! in real time.

Xact used the XData API to build a portal where service technicians could view the details of upcoming jobs, record the work done using a tablet and send an email to another ACT! user with the job details embedded. Xact also built in the capability for service technicians to capture client signatures on the tablet (using a finger or stylis) and have this record to ACT! as an image.

Kaffee Espresso are looking forward to implementing this solution and expect that it will reduce data duplication and streamline their service capabilities.

"Thanks to the XData API we now have a streamlined solution. The time savings have been huge and our level of customer service has increased dramatically."

ANTHONY THOMSON
ECO INSULATION

XData and Eco Insulation: Easy as 1-2-3

Eco Insulation provides award winning 'planet friendly' insulation and acoustic services for New Zealand homes. Having already used ACT! to manage contact details they looked to Xact Software for help with streamlining their quoting process.

One of the key objectives of this project was to reduce the level of paper usage and better align their business practices with the company's 'Eco' image.

The process for inspecting houses and preparing quotes was extremely frustrating for both scopers (staff that visit potential clients and assess the site) and administrative staff as it involved a lot of paperwork and duplicate data entry.

Scopers would pre-print the insulation forms for all their upcoming activities and fill these by hand at the customer's site. When they got back to the office admin staff would enter this data into ACT! and Excel then file the forms, and the scopers would start preparing quotes, re-familiarising themselves with each site as they went. When customers wanted to proceed, data from the installation form and quote were re-entered into QuickBooks and an invoice was generated.

With the help of Xact Software and XData, the API for ACT!, Eco Insulation have been able to simplify this process, eliminate duplicate data entry, make it easy for reps and administrative staff to stay informed and significantly reduce their paper usage.

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Xact created a web portal, powered by XData so scopers could log in using any Wi-Fi connected tablet.

This provided them with instant access to their ACT! contacts and task list, plus the ability to complete the required installation forms and provide quotes on the spot. All of the data feeds back to ACT! live – and can then be used to invoice customers and produce reports.

Step 2: Fill in Insulation Form

Step 1: View Task List

When scopers log in to the portal they are presented with a task list. Here they can choose to view contact details for an upcoming task, schedule a new task or choose an existing task to complete.

Step 3: Prepare Quotes

Scopers can now enter customer data into their insulation forms with ease as well as attach/sketch images. When submitted, form data is sent directly to ACT!

Scopers can also generate up to 2 quotes for a customer on the spot and email them right away. When a quote is saved a new ACT! Opportunity is created.
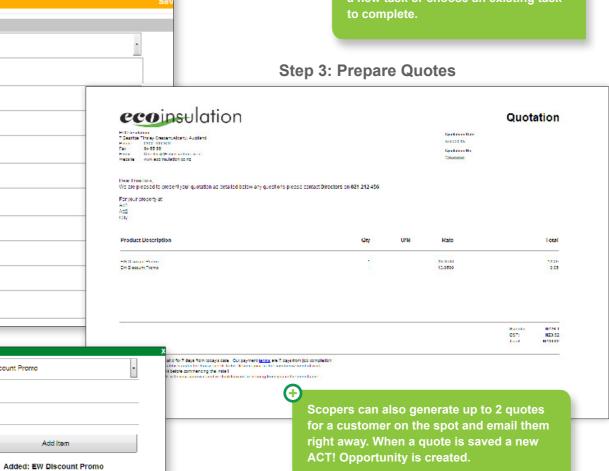
Real business benefits:

Implementing XData has dramatically improved Eco Insulation's assessment and quoting process, here's how…

Moving their forms online means Eco Insulation have been able to reduce their print and paper costs by up to 30% so far, and aim to increase this to 75% in the near future.

Scopers now have instant access to their task list and customer details so they can be more informed about the people they are visiting.

Admin staff no longer have to decipher handwriting, re-enter data and file forms for future reference. Everything is now available in ACT! – live.

Scopers can now present prospects with professionally designed quotes at the customer's site, rather than waiting until they are in the office and having to re-familiarise themselves with the site.

All data is now stored in a central location – ACT!, making it accessible to everyone and easier to manage.

Administrators can convert a quote to an invoice in one click. Quotes generated on site are saved in ACT! as Opportunities. Using the Xact Link for ACT! and QuickBooks these can easily be converted to invoices and emailed to the customer from within ACT!

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