AI & Online Invoices/Payment

Two questions answered by your fellow dealers

Compiled by: Brent Hoskins, Office Technology Magazine

Following are two questions submitted by dealer members as part of BTA's Dealers Helping Dealers resource, and many of the answers received. These answers and many others can be found in the members-only section of the BTA website. Visit www.bta.org/DealersHelpingDealers. You will need your username and password to access this member resource.

What are you doing with artificial intelligence (AI)? That is, if someone touches your website or clicks on a message, do you have workflows set up to respond automatically to these people? What tools are you using? ZoomInfo? HubSpot?

"We are using Google SEO and tracking click-throughs (mobile devices only) to a different phone number that goes into our VoIP system and we track the calls."
Chap Breard, president
MOEbiz, Monroe, Louisiana

"We are currently using HubSpot as a CRM. Service calls on devices in the field for seven-plus years generate sales leads in the CRM. Semiautomated processes are being used."
Doug Powell, operations manager
Copiers Plus Inc., Egg Harbor Township, New Jersey

"Our SEO company has set up a site that will contact us [when customers] fill out the contact page."
Van Seretis, managing partner
Premium Digital Office Solutions, Parsippany, New Jersey

"I am using a contact form that feeds into HubSpot and grabs the customer data from ZoomInfo at the same time."
Shawn Donelson, president
New Jersey Office Systems, Cranbury, New Jersey

"We are currently upgrading our office tool to include Zoom-Info, EvolvedOffice and AgentDealer (Salesforce). Once the installs are all done, we will be using ZoomInfo workflows to create automatic processes. ZoomInfo is incredibly powerful."
Michael Kenny, president & CEO
U.S. Copy Inc., Kenner, Louisiana

What products or solutions are you using to allow customers to access and pay their invoices online?

"We recently leveraged ECI to upgrade to its model for customer portal integration. It is in final beta test now. We are looking at e-commerce via [Keypoint Intelligence's] UVERCE."
Sheryne Glicksman, vice president of sales
Kelly Office Solutions, Winston-Salem, North Carolina

"We implemented e-automate's ECI e-info portal for our customers a few years prior to the pandemic starting, which saved our admin team so much time when many businesses began paying by ACH or credit card only. We have found the merchant fees to be similar to what we were paying previously. Additionally, our aged A/R has been reduced dramatically, as have our shipping costs since we are able to email invoices easily."
Christina Dargis, corporate administration manager
Copy Concepts Inc., Fort Myers, Florida

"ACH only."
Ron Weaver, president
Weaver Associates Inc., Lancaster, Pennsylvania

"Our clients can pay via credit card or bank debit."
Tony Sanchez, managing partner
C3 Tech, Santa Ana, California

"ECI e-info."
Nick Lioce, president
The Lioce Group, Huntsville, Alabama

"QuickBooks online."
Todd Deluca, president
Boston Business Technology, Plymouth, Massachusetts

Do you have a question for your fellow dealers? If so, email it to brent@bta.org with the subject line: "Dealers Helping Dealers." BTA will then share your question with the full dealer membership with a request for guidance from your fellow dealers. ■

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