



Abacus Success Stories

echo connects Microsoft Teams with the Abacus universe

In this interview, Beno Wüthrich, member of the management board, and Sonja Koreli, customer advisor and technical administrator, from Schwizer Haustechnik AG talk about their experiences with echo. echo enriches incoming calls via Microsoft Teams using information from Abacus Business Software and other data sources.

How long have you been using Abacus Business Software and which applications do you use?

Beno Wüthrich: We have been an AbaBuild customer since the very beginning and have been handling various processes via Abacus since 2017. Service Management plays a key role in this process.

You have recently started using echo for Microsoft Teams as a pilot customer. How did this come about?

BW: Our sales partner Abacus Business Solutions AG knew that we frequently utilise Microsoft products and inquired whether we would be interested in participating in this pilot project. The first step was to test the app with Sonja.

What role did you play in this pilot project?

BW: We have always been in direct dialogue with Abacus and Snapbean, the developers of echo. We were able to share our feedback and experiences directly, and our input was implemented very quickly. The collaboration was really very pleasant and uncomplicated.

What is echo and how exactly does the app work?

BW: echo connects our Microsoft Teams with Abacus and the search engine search.ch. This allows existing data from Abacus and search.ch to be displayed directly in Microsoft Teams. For example, the caller's name, address and e-mail address. I am also able to quickly identify the source of the data.

How does the app help with daily work?

Sonja Koreli: If the caller is already registered in the Abacus customer base, echo really helps us a lot. The telephone number is matched with the customer data in Abacus and the system immediately displays who is calling and what address they are calling from. This means I can switch to the project master at the same time as the call and start entering the service order. My aim is to dispatch the completed service order before the customer ends the call.

How did a classic phone call work without echo?

SK: I used to have to let the person finish before I could even ask what the address was, or I would google the correct address using the telephone number. Only then was I able to switch to the project master and enter the order. These days, I usually have the order down before the person even tells me where they live. That is definitely a big advantage. Callers are pleasantly surprised that I already know the property they are referring to.

How does the jump to the Abacus software work?

SK: The caller's data is displayed in Microsoft Teams together with the data source. If the data originates from Abacus, the "Open in Abacus" button appears. One click takes me to the corresponding customer dossier in Abacus.

What other functions does the application offer?

SK: The caller's address is displayed, along with any appointments, if scheduled. It compares the address or telephone number with the information from Microsoft Outlook. However, since I don't usually meet with customers myself, but rather our service technicians do, I don't need this feature. Theoretically, however, it would be possible.

"These days, I usually have the order down before the person even tells me where they live."

How does echo support you with data maintenance?

SK: Of course, the app only works as well as our data is maintained in Abacus. So I make a direct phone call to check whether the data displayed is still up to date. If something needs to be cleaned up, I jump into Abacus and adjust it immediately.

To which companies would you recommend echo?

BW: In my opinion, every company that uses Microsoft Teams for telephony and has a customer base in Abacus should use echo.

What other functions would you like to see?

BW: For me, the most important functions are covered. I can see the name, address with house number and, if available, the e-mail address at a glance and can quickly jump to Abacus. The app should continue to focus on this simplicity in the future.



The approximately 65 employees of Schwizer Haustechnik AG ensure holistic planning and realisation of projects in the areas of plumbing, heating, ventilation, bathrooms and interiors. The family-run company, headquartered in Gossau, has been in existence for 88 years and is also represented in St. Gallen and Rickenbach.



About Beno Wüthrich

Beno Wüthrich has been a member of the management team at Schwizer Haustechnik AG for two and a half years. Among other things, he is driving digitalisation in the company.



About Sonja Koreli

With over 12,000 phone calls per year, Sonja Koreli tops the list of employees with the most phone calls in the company. She has been working as a customer advisor for twelve years and is the cornerstone of the service department.

