



ESC and QuickBooks Make a Splash at Panther Amphibian

Pool service company cleans up dispatch mess with service management software that works with QuickBooks.

AT A GLANCE:



COMPANY: Panther Amphibian



LOCATION: Naples, FL



INDUSTRY: Business Services –
Pool Service Company



BUSINESS CHALLENGE:

Pool service/repair company needed a better way to manage and track work orders that were dispatched out to field technicians.



SOLUTION:

Coastal Computer ESC and QuickBooks: Pro



RESULTS:

Together ESC and QuickBooks allow Panther Amphibian to:

- Help meet its goal to increase revenue by 20- to 25-percent
- Reduce the amount of work required to input customer information into dispatch notices
- Make the dispatch process more manageable for owners, field technicians, and administrative staff
- Better track repair trips and installed equipment for invoicing
- Improve response times to customer calls

“Tracking dispatches is far less draining, more thorough, and things aren’t getting overlooked. Now we are billing for all our work.”

Steve Lewis
Co-owner
Panther Amphibian



Panther Amphibian offers a full line of pool maintenance services to residents around Naples, FL. The company’s 11-person staff cares for more than 500 pools on a weekly basis. In addition to regular visits to customers’ pools, Panther Amphibian responds to urgent calls for repairs, installations, and other unscheduled services.

Business Challenge

For the regularly scheduled visits, Panther Amphibian was able to service its clients like clockwork. Unexpected dispatches, such as repairing a broken pipe or replacing a part, caused a few kinks in the well-run system.

To track these dispatches, Panther Amphibian entered the information into Outlook and printed the work orders for the technicians. Entering the customer request on the work order was the easy part. Tracking the order through the different stages, reconciling it, and invoicing was a multipart process.

“We used four or five clipboards to track a work order’s progress. We really needed to cut a few steps,” says Steve Lewis, co-owner of Panther Amphibian.

Distributing complete customer data with the field technicians was another sticking point of the Outlook dispatch system. All of Panther Amphibian’s customer information resides in QuickBooks. Getting that contact info into Outlook was difficult. At times, a technician would visit a customer’s site when the customer was not at home. Since the work order did not include a second address or backup phone number, these trips were lost time for the technicians.

“The process just wasn’t working very well,” recalls Lewis. “It was unmanageable and things were falling through the cracks.”

Solution Overview

Lewis was a long-term QuickBooks customer, having used the software in his businesses for 12 years. To improve his dispatch system, he wanted QuickBooks Compatible software that would share data across both systems.

Electronic Service Control (ESC) from Coastal Computer Corp. more than met Panther Amphibian’s requirements. “It seems like everything we’ve ever dreamt of doing, we can do with ESC,” says Lewis.



All dispatches are managed through ESC. If an item has to be dropped off to a customer or a pool needs a major repair, this request is entered in ESC. When the task is complete, ESC creates an invoice and posts it to QuickBooks. Customers, Jobs, Vendors, Invoices, Accounts Receivable, and Purchase Order bills are seamlessly transferred to QuickBooks.

Once a customer, job, or vendor is entered into ESC it is transferred in real time to QuickBooks. When inventory is received on a purchase order, ESC will create an accounts payable bill in QuickBooks. Sales invoicing is posted to QuickBooks exactly as it was entered in ESC.

Business Benefits

When considering the results that Panther Amphibian has experienced since adding ESC and QuickBooks, Lewis first points out how much easier it is to manage the business.

“Tracking dispatches is far less draining, more thorough, and things aren’t getting overlooked,” he explains. “Now we are billing for all our work.”

Because Lewis has a more efficient process for entering dispatches and billing for them, Panther Amphibian is reaching a new level of revenue. The owners had set a goal of increasing revenue 20 to 25 percent.

“We have increased our revenue because we are much more systematic. We don’t improvise on labor fees or trip charges,” says Lewis. “ESC and QuickBooks are a big part of us reaching our revenue goals.”

He has also noticed that Panther Amphibian has a higher level of professionalism. “When a customer calls, we are able to provide the appropriate response more quickly because we have a better grasp of the customer’s overall activity with us.” The customer notes and history in ESC give Panther Amphibian a much better understanding of the customer’s situation.

When Hurricane Wilma hit the Florida coast in 2005, Panther Amphibian was inundated with emergency clean-up requests. All these dispatches were managed through ESC. Lewis added a new column in ESC listing all hurricane issues.

“We would not have been able to properly manage the massive cleanup without ESC,” says Lewis. “My stress level was much lower because I knew we were tracking everything through ESC and QuickBooks.”

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