



Acowin for Windows and QuickBooks Make a "Cool" Solution for Champion Service Experts

Heating & A/C company triumphs over growth challenges with Acowin service management software and QuickBooks Premiere Edition

"Our company never could have grown to its current size without Acowin for Windows to handle our service dispatching, maintenance contracts, and multi-truck inventory, and QuickBooks to handle our accounting."

Amy Holt
Owner
Champion Service Experts

SUCCESS STORY

Champion Service Experts
Heating & Air Conditioning

AT A GLANCE:

Customer:
 Champion Service Experts
 Heating & Air Conditioning
 Company

Location:
 Flat Rock, North Carolina

Industry:
 Heating and Air Conditioning

Business Challenge:
 Rapidly growing HVAC contractor needed software tools to manage an expanding team of service technicians and explosive sales growth, plus detailed profitability analysis of their varied product lines

Solution:
 Team Management Systems' Acowin for Windows and QuickBooks Premiere Contractor Edition

Results:
 Business growth managed and new opportunities explored

Customer Profile

Champion Service Experts is a heating and air conditioning company in Flat Rock, North Carolina. They offer both new system sales, and service for existing heating and A/C systems. Additionally, they provide service contracts with benefits including regularly scheduled maintenance visits.

Business Challenge

Champion Service Experts found itself in the middle of explosive sales growth from the moment the company opened its doors. A small staff of technicians rapidly grew as the company's base of established customers tripled in 2006. An efficient service management solution was needed to keep the company's office expenses minimized, and efficient scheduling of technicians proved to be a crucial requirement. In addition to its demand service calls and new system installations, Champion found itself with over 500 annual service contracts to manage. These contracts include periodic maintenance visits to test and clean the customers' climate control equipment, and replenish expendable supplies such as air filters.

Solution Overview

It was obvious from the start that QuickBooks would be the ideal accounting solution for the company, with its adaptability and ease of use. The challenge was to find a service management program that would offer all the features Champion needed to manage its growth, while integrating smoothly with QuickBooks. Amy Holt, Owner, found Acowin for Windows to be the perfect fit. "Acowin and QuickBooks work extremely well together," says Holt. "Without Acowin, we had trouble managing our technicians efficiently, and building the kind of service history database that's needed for top-of-the-line customer service in our industry. Our invoices were totally separate from our service work orders, which doubled our workload. We needed to consolidate those functions and have carefully managed technician labor produce detailed service history, which would smoothly become invoices that we could handle with QuickBooks. The Acowin system provided that missing link."

The fast-paced customer service environment resulting from Champion's growth demanded instant access to customer data. "With Acowin, it's all in one place," explains Holt.

(Continued on next page below)





Solution Overview (continued)

"You can jump from a service ticket to detailed service history, invoice balances, extensive customer information, or equipment data by just clicking a button. You can even have photos of the equipment, right next to their model and serial numbers. The customer screen has room for everything you could ever want to know - multiple phone numbers for both billing and on-site contacts, email addresses, and special service needs. There's a feature that lets you attach all kinds of files from other programs, so you can have floor plans, blueprints, digital pictures, spreadsheets, and proposal letters all in one place. You never have to go looking for anything."

The powerful Acowin Dispatch Board provided a simple, visually appealing environment for scheduling service calls and managing field technicians. Each dispatcher could organize different groups of technicians and switch between them at will, making it easy to work with a growing field service team. The simple drag-and-drop interface made training new dispatchers easy. Zoning and mapping tools helped to reduce travel time. These dispatching functions were smoothly integrated into service billing, producing detailed invoices that could be handed off to QuickBooks. Service contracts are a major part of the Acowin system, fulfilling another of Champion's essential requirements. Regularly scheduled Contract billing and inspection visits are handled automatically. "Contracts are a big part of Acowin," says Holt. "You can instantly tell which customers have service contracts, right from the Dispatch Board. The system can handle all sorts of billing and inspection schedules. You don't have to remember when maintenance visits are due - Acowin even creates the necessary work tickets for you, at the appropriate time."

Business Benefits

The combination of Acowin service management software and QuickBooks has helped Champion Service Experts manage its expansion, and make plans for future growth. "Acowin makes the accounting process simpler, but gives you the data and reports you need to analyze profitability for individual technicians, departments, and the company overall," explains Holt. "It helps you determine where you're making and losing money, so you can plan future expansion and investment." Acowin helps the sales department by generating everything from detailed profitability reports and equipment lists to mailing labels.

Using the Acowin software to run the service department has helped Champion deal with increasing sales without increasing its office overhead. Integration with QuickBooks gives the company the benefit of the powerful Receivables, Payables, and General Ledger features of QuickBooks, without requiring any double entries. Acowin provides all customer service personnel with essential service and billing history for each customer, allowing the company controller to restrict access to the sensitive QuickBooks data.

Holt was initially nervous about making her service operation so dependant on a single software program, but she was reassured by her experience with Team Management Systems' support department. "The Acowin program has great support, and everyone is very friendly and helpful," she reports. "They always go the extra mile to help you with everything, and they were with us every step of the way during our software implementation. The Acowin program also comes with a great help system and extensive tutorials that teach you everything about the program."

"We've had a great relationship with Team Management Systems, all the way from our first demo to today. I feel confident knowing they'll be with us wherever the future takes us."

Amy Holt
Owner
Champion Service Experts

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Team Management Systems
www.acowin.com

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