

## *Electronic Service Control by Coastal Computer Corporation*

**Overall Rating****8.63****Summary****Product Name**

Electronic Service Control by Coastal Computer Corporation

If you are in a service business that sends out technicians to client sites, you need to look at this software. This is software you can feel confident recommending to a friend. The design is elegant and well thought out, the functionality contributes to the success of your business in significant ways and it all works like a breeze with QuickBooks.

**Reviewed By**

Earle McEwen

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**Strengths**

This system was designed by someone who really understands how a service business makes money. The system is easy to use and takes you from the time you get the call until the time you get paid. It helps you optimize your utilization of technicians, control your inventory, and support the technicians in the field with critical information. If you are in the business of making and keeping promises and keeping your customers up and running this software will help you succeed.

**Limitations**

Not many that I could see. See wish list below.

**Date Reviewed**

October 25, 2005

**Wish List**

I would like to see custom fields for inventory items and time passed through to QuickBooks payroll to avoid duplicate entry. However most clients will post the totals for the time period only which makes entering time for payroll a simple task.

Product Ratings	Rating	Ratings Definitions
<p><b>Setup and Installation:</b> The software arrived with an 18 page User's Guide and a 16 page QuickBooks interface guide. I was installed and interfaced to QuickBooks in about 45 minutes without any calls to technical support and by just scanning over the documentation. They have developed a QuickBooks connection wizard that worked flawlessly. This is the way installation and interface should work!</p>	9.0	<p><b>10.0 (Perfect):</b> This is a very rare score is reserved for a product that is as perfect as it could be.</p>
<p><b>Interface:</b> The interface is very clean and intuitive. You can navigate from a menu, an icon bar across the top or a navigator bar down the side with pop-out flowchart/menus. The screens are well organized and easy to follow.</p> <p>When you click on the Search icon on the customer screen it pops up a window with a list of all the customers and field entry boxes at the bottom. It was not intuitive to me that the field entry windows were for specifying search fields. The fields need a label to tell the user how they work. There was also a field title called CSZ that was not clear to me but a simple push of F-1 reveals context sensitive help with a completed screen that clarified that CSZ mean City, State and Zip.</p>	8.0	<p><b>9.0 to 9.9 (Spectacular):</b> A product that receives a rating in this range succeeds at meeting all of its intended users' needs and has no major drawbacks.</p> <p><b>8.0 to 8.9 (Excellent):</b> A product that receives a rating in this range is superior in so many ways that its few drawbacks do not have much negative impact.</p> <p><b>7.0 to 7.9 (Very good):</b> While the strengths of a product scoring in this range certainly outweigh its weaknesses, it has some minor faults that users should be aware of.</p>
<p><b>Features:</b> There are a number of features in ESC that impressed me. They include:</p> <ul style="list-style-type: none"> <li>• The ability to link customers, equipment, dispatch history, previous notes, and other files in your system to the customer for easy retrieval and reference.</li> <li>• The Electronic Dispatch Board for tracking real-time the status of all technicians.</li> <li>• Interactive mapping and schedule optimization.</li> <li>• Inventory functions including: <ul style="list-style-type: none"> <li>▪ FIFO inventory costing.</li> <li>▪ Multiple warehouse locations (i.e. each service truck can be a warehouse.)</li> <li>▪ Serialized inventory.</li> <li>▪ Bar code capability and a POS function.</li> </ul> </li> <li>• Ability to track multiple locations per customer and have multiple pieces of equipment in each location.</li> <li>• Track service agreements</li> <li>• The ability to drill down in some reports like we can in QuickBooks.</li> <li>• The ability to interface with a number of hand-held devices in the field, some of which are GPS enabled and plot the travel of the technicians on the MapPoint screen.</li> <li>• Caller ID that automatically retrieves the customer record and related information when the customer calls.</li> <li>• The technician profitability report.</li> </ul>	9.0	<p><b>6.0 to 6.9 (Good):</b> This range represents a product that is above average. Its strengths outweigh its weaknesses, making it good for most uses but not a standout.</p> <p><b>5.0 to 5.9 (Average):</b> A product that scores in this range is functional but unremarkable.</p> <p><b>4.0 to 4.9 (Mediocre):</b> Products in this range are below average. They fall in the middle of the pack for most features, but suffer from a few additional major flaws.</p> <p><b>3.0 to 3.9 (Poor):</b> A customer should probably not consider purchasing a product in this range or lower. There may be one or two specialized circumstances, however, that could justify the purchase of this product for a very low price for a specific demand.</p>



- Ability to email dispatch tickets to technicians.
- Dispatch qualification screen shows A/R, agreements, equipment list, and dispatch history with client.
- Report showing profitability on service agreements.
- QuickBooks server application allows QuickBooks to be on one machine, single-user but still have multiple users of ESC.

### Follow-through on Claims

9.0

The website listing for this product makes three pretty strong claims. They include:

- 1) “The most powerful service management software available.”
- 2) “best interactive dispatching in the business.”
- 3) “built on the latest technologies available by the best developers in the business.”

Claims like most powerful and best are tough to substantiate since I haven’t seen everything that is out there. I can tell you this reviewer was not disappointed. The software was built using visual basic and the Jet database for single users and the MS Desktop engine for multi-users. The developer recommends running MS SQL for greater than about 10 users. The applications are both Microsoft and SQL certified.

### Ease of Use/Service and Support

7.0

You can call in or log a support request online. They can use remote access to access your machine for technical support purposes. You initiate the connection with a pass code that they give you. You cannot speak to a technician directly, they have to call you back. I found the support people to be very knowledgeable and easy to understand. Numerous training options are available including onsite, online and regional training in a different state each month. They also provide an 800 number for support.

This is a mission critical application. I think it is problematic to have to wait for a call back from support and that their hours are only 8:30 – 5:30 Eastern time. This might be a problem for west coast companies that use this software.

### Data Security

9.0

There is the ability to limit users to selected functionality within the software. The Sequel database helps prevent corruption errors.

### Privacy

9.0

The company has a published privacy policy that is reasonable and fair.



## Integration with QuickBooks

This software shares a number of significant data elements with QuickBooks:

Customers/Jobs and Vendors are kept synchronized on a real-time basis when the information is entered into ESC.

Invoices are created in ESC and posted in batch mode to QuickBooks when posting is initiated by the User from ESC.

There is a POS function in ESC that generates sales receipts for QuickBooks.

Purchase Orders and Inventory are tracked in ESC. Summary cost entries are posted to inventory in QuickBooks but individual items are not tracked in QuickBooks. Receipts against a PO are posted to QuickBooks as bills. This can be done for partial receipts or set up to only create bills in QuickBooks when the PO is complete.

Accounts Receivable accounting is done in QuickBooks but is available for real time inquiry through ESC so when a customer calls you know right now what they owe you. Payments are entered in ESC and assigned to an invoice then passed through to QuickBooks automatically.

The job costing function can be performed in ESC if you can live with standard cost. Materials cost information is posted to QuickBooks at the job level. Labor would have to be manually distributed in QuickBooks timesheets to individual jobs to complete job costing information in QuickBooks.

The one element not yet interfaced to QuickBooks is timesheets for payroll data entry. There is a tech hours report available that summarizes the hours but these must be manually entered in QuickBooks payroll.

ESC “dances” very nicely with QuickBooks giving it what it needs and giving the information to the User in the most logical place. The interface is neither cumbersome nor does it get in the way. It just happens transparently as it should. The only exception is that it requires user intervention to post invoices. It would be nice if these were automatic.