

The



**Solution!**

## *Wireless Service Software*

### **How United Maintenance Improved Cash Flow, Achieved Better Communication and Enhanced Customer Service**

“We wanted single-source responsibility, and MaxService delivered. With Maxwell, we could now have a seamless system for both accounting and service.”

Kent Montgomery, Service Manager  
United Maintenance

United Maintenance needed to automate their service operations. It was the late 1990's and the Atlanta-based HVAC contractor employed 60 people, had a service fleet of 24 trucks, and a number of high-profile clients that relied heavily on their services. Service manager Kent Montgomery, and his team of dispatchers, manually handled over a hundred calls a day.

“It was somewhat of a circus,” Montgomery, a United Maintenance (UM) employee of 25 years, recalls. “We had stacks of handwritten service calls and arranged them on a board with push pins.” Those calls had to be constantly re-prioritized throughout the day as important issues arose. “When you are responsible for the Georgia Power control room in Atlanta, and they are about to black out, you gotta be there,” he said. “It was quite a juggling act – and it was very labor intensive.” So they began looking for a better way.

In business since 1974, UM has always made technology a priority. Adopting a technology-centric approach for their own operations was the natural path for this service company, that often works with high-tech equipment for high-tech clients in the electronics, manufacturing and medical fields.

### **Initial Implementation**

At the Air Conditioning Contractors of America convention in 1998, UM started looking at dispatching systems that would allow wireless transmission of service ticket information to and from the field. “We liked the idea of going paperless so we could speed up our system and better serve our customers,” says Montgomery.

After researching available options, UA chose to implement Field Centrix, a system which allowed them to communicate with the technicians and also offered the efficiency of importing field service information into their existing accounting software: Maxwell Management Suite by Maxwell Systems. Ultimately, this data exchange streamlined billing and delivered better reporting.

However, there were often problems with the compatibility of upgrades and the combined systems required a lot of maintenance – problems not uncommon when two separate software companies partner to offer integration. To make matters worse, the wireless carrier they were working with was somewhat unreliable and they often had difficulty getting service call details out to technicians.

Eventually the expense of supporting their dispatching system and the hassles of spotty field coverage outweighed the benefit of wireless dispatching. So UM decided to restart their search for wireless capability.

## MaxService: The Next Generation of Wireless Service

By now, Maxwell Systems had developed their own wireless service and dispatch software for Maxwell Management Suite, called MaxService. "Betty Hardy, our controller, has used Maxwell for 12 years and loves it. She was very excited to learn that we were looking into MaxService," Montgomery says. Since it was clear that UM needed a fully-integrated system this time around, they gave serious consideration to the product. And they liked what they saw.

"We evaluated a dozen different systems, but we really didn't want another hybrid system. We compared all of the features and found that MaxService met our dispatch needs. We had been so satisfied with Maxwell's accounting software and support, that MaxService was the obvious choice," Montgomery explains.

"We wanted single-source responsibility," Montgomery states, "And MaxService delivered. With Maxwell, we could now have a seamless system for both accounting and service."

After researching hardware options and wireless carriers, UM selected tablet PCs equipped with Bluetooth wireless technology, Cingular service and Motorola camera phones.

Because Bluetooth service was not immediately available in their area, they improvised for the first few months by connecting their phones to their PCs to transmit data, an unconventional approach typical of UM's innovative determination. Montgomery recalls: "When we contacted Cingular about what we wanted to do, they said 'What? No one is doing that!' and we said 'WE ARE!'"

## A Smooth Implementation

UM proceeded with cautious, well-planned steps, assisted by the implementation and support team of Charlotte-based Sunrise Consulting Group, Inc., an authorized Maxwell Systems dealer. To make sure they'd be able to reach all of their service area, they set up a test server and sent calls to five areas of town that they'd never been able to reach with their previous system. "All of the calls made it to the field, and all of the data made it back," says Montgomery. "That was very reassuring."

The implementation was smoother and speedier than expected. A Sunrise consultant helped UM plan for the transition and salvage data from their old system, and was on-site for installation and training. "We were prepared for a lot of problems and traumatic days, but didn't have them," Montgomery recalls. "When we implemented our previous system, the software company was here for two weeks. This time, Sunrise spent only three days setting us up and training our technicians."

As soon as Cingular supported the technology, the techs went cable-free using the Bluetooth wireless capability to give field units Internet access without the need to physically connect the phones to the PCs.

Their investment, Montgomery reports, was minor compared to what they had spent on Field Centrix. For PCs, phones, software and implementation services he estimates they invested about \$120,000. "Most companies would be out of business with what we spent trying to make the old system work. Before, we spent that much each year."

ROI, says Montgomery, has been easily achieved.

## Multiple Benefits to the Bottom Line

MaxService has significantly streamlined UM's operations by increasing utilization in the field, allowing for quicker billing and more controlled cash flow, and improving customer service. With 700+ contract customers and a workload that averages nearly 50,000 hours of service work, those efficiencies make a big impact on the bottom line.

With MaxService in place, UM has "almost instant data access." History is sent out with the ticket so that technicians don't have to call each other or the dispatcher when they have a question. "With all of that time on the phone asking questions and waiting on hold, we had a lot of unapplied labor," explains Montgomery. "Now, if a technician has a question, he can get an instant e-mail with all the data he needs. It saves each tech at least an hour of time every day," he said.

The easy access to information has also improved the performance of UM's office team. "Because they have back-up data and electronic copies of all documents, customer questions are quick to answer, which saves both our time and our customer's time," Montgomery relates. "Personally, I used to spend at least an hour each day hunting for information and responding to just a couple questions. Now, I get answers right away." Using Maxwell's well-integrated data retrieval functionality, Montgomery and his team can easily e-mail customers copies of work orders and invoices.

Most significant is the improvement MaxService has made on UM's cash flow. It used to take the accounting department a minimum of three to six weeks to get an invoice out to a customer. Because completed service tickets are now sent back to the office almost immediately, customers are billed within a few days. "That's about as close as we can get to collecting on the jobsite," Montgomery states.

And with timely billing comes easier collections. "When you've just helped a customer and they are sitting there all cool, if they get a bill quickly, they are still happy, still remember how it felt, and they pay quickly," explains Montgomery. "Your valuable service is still fresh in their mind."

## A Positive Company Image

Montgomery is proud of the positive image UM has earned for their aggressive use of innovative new technology. "Our customers love it, especially the younger ones. It says to them: 'These guys are staying up with technology, so they will be using the top technology on my equipment, too.' It's an image thing," he says. "If you go to a doctor and he has old tools, what do you think? Do you want to go to him or someone using the latest technology?"

UM's technicians are happy to be equipped with these tools as well. "When we first started talking about using a dispatch system, the guys were intimidated. But now they are hooked. When they went without field units during the short transition from Field Centrix to MaxService, they were asking how soon they would be automated again," Montgomery recalls. "They forgot how nice it was not to have to deal with all that paper."

United Maintenance is locally supported by Sunrise. Montgomery credits some of UM's ease in adopting MaxService with Sunrise's responsive support services and their use of time-saving remote access tools. "The Sunrise team is hard to beat. Everyone is so helpful and the support response is absolutely amazing. My issues are resolved quickly over the phone using a remote access tool that allows them to connect to our computers to help us. It is a big plus to know that we're not going to be down, waiting for someone to come on-site to help," he said.

## Next Steps

The UM team isn't sitting back and relaxing with all the time they are saving. The technicians are using their camera phones to photograph the units they are servicing, and Montgomery is looking at adding GPS devices for directional navigation. A new wireless network in the office allows technicians to come in and effortlessly synchronize laptops with the server. "Sunrise set up our network so that files like unit information, wiring diagrams and instructional documents are updated wirelessly. The guys automatically have all of the most up-to-date documentation."

Says Montgomery: "We are in uncharted territory. We are still learning the capabilities of our system, and Sunrise and Maxwell have been right there with us. Maxwell seems to be truly concerned with their customers, and we have been very happy with our choice. The MaxService technology is really paying off."



For more information on how MaxService can benefit your service operations,  
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