

## Case Study: Key Mechanical

### Flourishing Through Service

With offices near Seattle and Portland, Key Mechanical provides refrigeration and HVAC services to the commercial and industrial sectors of Washington, Oregon, Alaska, and parts of Idaho and Montana. Key Mechanical is the primary Tyler Dealer in Washington west of the Cascades, and in all of Alaska and Oregon. Among its clients, Key serves Boeing, the city of Seattle, Quality Food Centers (QFC), Haggen's, and Top Foods. The company is a member of MCAA (Mechanical Contractors Association of America) and the ISE (Institutional and Supermarket Equipment) cooperative of contractors.

### The Evolution of a System

In 1993, Key Mechanical first began working with the DOS-based version of Data-Basics' service modules. At first, Key used Peachtree for most of its accounting functions and manually re-entered data from the Data-Basics software into the Peachtree software. Soon enough, however, Key purchased a complete Data-Basics system, finding that Data-Basics' full integration eliminated the inconvenience of double posting and made their service department more efficient.

By the late 1990's, Key Mechanical president and owner Frank Leonard foresaw that coping with Y2K issues would mean a complete upgrade for Key Mechanical's service management and accounting software. At that point, Data-Basics approached Frank Leonard with an opportunity to beta-test its new Windows-based SAM Pro Enterprise.

"We had looked at several other software order information. packages and explored our options, but with SAM Pro I saw a chance to help develop a product uniquely tailored to the service and construction industry," Frank Leonard explains.

#### Company

Key Mechanical  
Locations in Washington, Oregon and California

#### Vertical Industries

Design/Build Refrigeration Contracting

#### Country/Region

Pacific Northwest

#### Solution

SAM Pro Enterprise implemented by Data-Basics

#### Solution Description

Integrated software application providing real-time access including the Anywhere Suite of tools for access to information via wireless and the Web

“By working with Data-Basics to develop SAM Pro, we would be able to ensure that a service management software package would work the way our industry works.”

With the input of Key Mechanical and other clients, Data-Basics was able to evolve SAM Pro Enterprise into the streamlined, flexible product that it is today. SAM Pro's powerful reporting system and customizable dispatch board with drag-and-drop work order scheduling enhanced Key Mechanical's operations, bringing greater efficiency and helping Key's bottom line.

Subsequent efficiency-enhancing applications help keep all branches of Key's service department functioning as a whole. “My employees are excited by the potential of Rules-Based Management features such as Escalation Manager.” Frank Leonard says. “They love the alarm board and they appreciate the client pop-up notes that remind them of our client's order history. On the construction side, the project managers are very interested in the ReportAnywhere capabilities so that they can receive automatically generated reports directly into any e-mail address at scheduled times”

Frank Leonard and Key Mechanical look forward to implementing even more productivity-enhancing features from Data-Basics. The company is currently working to incorporate the Remote Technician Applet, which runs on portable Windows/CE devices and will provide Key's technicians with real-time access to current and historical work.

**Data-Basics**

[www.databasics.com](http://www.databasics.com)

**Corporate Headquarters**

9450 Midwest Avenue  
Cleveland, OH 44125  
(p) 800-837-7574  
(f) 216-663-5454

**Kansas City Office**

13849 Mur-Len Rd. Suite 1  
Olathe, KS 66062  
(p) 800-480-0944  
(f) 913-397-8490