



## PERFORMANCE AIR MECHANICAL CASE STUDY

### The Challenge

Performance Air Mechanical, an HVAC service provider based in Florida, needed a means to streamline its billing process while maintaining better inventory control. Paul F. Beckett, president and owner of the company, was tasked with finding a way to increase technicians' billable hours while cutting down on a lengthy customer billing cycle – which, with techs out in the field for one to two weeks at a time, could be up to three weeks behind.

### The Solution

When Performance Air Mechanical needed to improve its customer billing process and inventory control in 2006, it turned to Data Basics for SamPro Enterprise software including Data-Basics' TechAnywhere wireless field service software. After successfully implementing the backoffice financial and service modules, Performance Air slowly implemented the wireless TechAnywhere technology across its field of more than 20 technicians.

TechAnywhere allows technicians to use tablet PCs to access work orders, add labor, material and inventory, capture signatures and credit card payments, process attached documents and submit billing data to the

#### CASE STUDY OVERVIEW

**Performance Air Mechanical**

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

Orlando, Florida

**Vertical Industries**

Family-owned HVACR sales and service company

**Country/Region**

South Florida

**Solution**

SAM Pro Enterprise with TechAnywhere

**Solution Description**

Integrated software application providing real-time access to service, sales, distribution and back office information.

back office in real time. For Performance Air, this meant improving the speed of its customer billing from a three-week turnaround to two days. It has also helped Performance Air to maintain better quality control of inventory, since a technician can instantly send to the home office a list of all products used or specialty products that need to be ordered.

TechAnywhere gives Beckett's technicians the ability to input a customer's billing data instantly on a tablet PC, erasing the handwritten bills that once had to be hand delivered to the home office. Bills are now sent instantly to the company's office staff. In turn, this technology saves the office employees from importing handwritten data, and sometimes misinterpreting the technician's notes.

Performance Air Mechanical technicians also use TechAnywhere field service software to keep better inventory of stock aboard their vans. Since the techs are dispatched from their homes each morning, they may not visit the main office for one to two weeks at a time. Now, when techs arrive at the office, they can reload their vans easier.

## The Results

Since it began using TechAnywhere wireless field service software, Performance Air Mechanical has improved customer billing to keep cash flow where it needs to be. Beckett gives TechAnywhere much of the credit for increased employee efficiency. Office employees are spending less time on data entry, while techs are on the radios and phones less. And since technicians can now special order parts, there is no longer a need for employing an expeditor. Since using the wireless field service software, Beckett said that billable hours have increased, he employs two billing clerks instead of three, and there are less trucks on the road due to higher efficiency among technicians.

### Data-Basics

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