



Refrigeration Solutions goes mobile with Dispatched

HVAC Refrigeration company streamlines its operations using Dispatched with mobile technologies, GPS, and Quickbooks integration.



Refrigeration Solutions

Company Name

SUCCESS STORY

Refrigeration Solutions

AT A GLANCE:

Customer:

Refrigeration Solutions

Location:

Sacramento, CA

Industry:

Commercial and Industrial Refrigeration and HVAC

Business Challenge:

Refrigeration Solutions needed to streamline service invoice pricing and processing both in the field and in the office.

Solution:

Dispatched – Service Management Software
Quickbooks
Mobile Module with Integrated GPS

Results:

Double entry of information was eliminated. Refrigeration Solutions has cut invoicing time in half and has gone to a completely paperless system.

Customer Profile

Refrigeration Solutions provides sales, service, and installation of commercial and industrial refrigeration equipment to grocery stores, restaurants, winery's, cold storage and related businesses.

President Sam Wilson uses his fleet of six service vehicles to cover the Sacramento, California area. For more information about Refrigeration Solutions, please visit their website at www.refrigerationsolutionsinc.com

Business Challenge

Finding a complete service management software system was very important to President Sam Wilson. Sam needed to streamline his invoicing and work order system. Field technicians needed to be able to total an invoice with accurate pricing. The dispatch and scheduling departments needed to know each service vehicle's current location in order to quickly provide quality customer service and accurate invoicing.

Maintaining a fleet of six service trucks required a lot of time and paperwork. At the end of the day, work orders would have to be totaled and sent to customers. As

The Mobile module also provided an added benefit by allowing field technicians to create and even assign work orders from in the field. With built in mapping, the field technician could immediately locate the customer's address. Using Quickbooks parts and items, work orders are accurately totaled in the field.

With the addition of the GPS module, the scheduling and dispatch department always knows which crew is in the area. The built in mapping feature shows where all technicians and jobs are in real time.

Dispatched – Service Management Software from DeFNiC Software and Consulting offers service software solutions to companies who install, maintain, and service equipment. The suite of products and solutions provides immediate benefits to companies with a mobile workforce. Dispatched manages all aspects of a work order's life cycle including scheduled maintenance agreements, service calls, installs, customer equipment, field service, accounting integration with Quickbooks, and GPS.





with any handwritten work order system, the process resulted in lost paperwork, illegible handwriting, incorrect pricing, and the list goes on.

Solution Overview

After attending the largest HVAC industry expo, the annual AHR Expo, Sam found Dispatched – Service Management Software. Dispatched was exactly what Sam Wilson needed in his company. Furthermore, after an exhausting search of alternative companies Sam states, “I really never found anything else that did what I needed it to do.” Dispatched was the only product that alleviated all of Sam’s business needs.

By integrating Dispatched – Service Management Software into Sam’s business, each of his business needs were addressed. The software allowed Refrigeration Solutions to get organized. With the Quickbooks integration all work orders could be totaled using Quickbook’s customers, jobs, and items. The software eliminated double entry of information and streamlined the work order process.

By adding the Mobile module to Dispatched, Refrigeration Solutions turned an office based work order into an electronic field work order. Field technicians can total invoices in the field and send the completed work order back to the office in real time. Plus, a completed copy can be printed or emailed to the customer on the spot.

Business Benefits

Using Dispatched with Quickbooks, Refrigeration Solutions has been able to streamline the entire business process. Information is entered once and then passed to each department electronically, thereby eliminating double entry and costly mistakes.

Invoicing time has been cut in half. When asked about the time savings of using Dispatched, Sam Wilson states, “I would say it cut the total time in half.” Add the integrated GPS reports and Refrigeration Solutions can confidently and accurately invoice its customers.

The key to successful implementation of quality CRM software is commitment and support. The team at DeFNiC Software is not like other software companies. A designated account representative assists your company in the setup and implementation of the software throughout the entire process. When asked about the Dispatched support team, Sam Wilson states, “The support has been the best that I have experienced with a software program. It has definitely saved us a lot of time.”

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Sam Wilson
President
Refrigeration Solutions

Name
Title
Company

FOR MORE INFORMATION VISIT:

DeFNiC Software and Consulting
www.dispatchedsoftware.com

Quick Books
www.quickbooks.com

Refrigeration Solutions
www.refrigerationsolutionsinc.com

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