



Ascente and TRAVERSE: the Right Combination for Renowned Plumbing & HVAC Company

Bruce Solomon Plumbing, Heating & Air in Reisterstown, MD was established in 1984 and was founded on the principles of outstanding workmanship, dedicated and courteous customer service, and a promise to achieve 100% satisfaction with each and every company they serve.

Since then, nothing has changed – except their business software.

Several years ago, the company was using a legacy system that had become antiquated. It was a DOS-based product they were using in a Windows shell, but they were unable to obtain all of the source code and they were not able to take the DOS code over to Windows. They kept patching it, but over time the product was not compatible with certain pieces of hardware, which had become faster and more sophisticated. Support for the product was eventually discontinued.

Company owner and Registered Master Plumber Bruce Solomon consulted with Compusource Corporation, a leading developer of business software solutions for the HVAC, plumbing and electrical industries. He was given a demonstration of Compusource's Ascente product. Ascente is a graphical and fully-integrated suite of Windows-based applications designed to increase the efficiency and productivity of service contractors. It was created to fill the demand for a product with a graphical interface for use on Microsoft Windows, and is fully integrated with TRAVERSE accounting applications from Open Systems, Inc.

Bruce Solomon Plumbing, Heating & Air went live with Ascente and TRAVERSE in September of 2004. The Ascente applications they use enable them to track service calls, perform maintenance tasks, issue purchase orders, keep job cost data, offer flat rate pricing, and utilize paging with an interfaced GPS system. TRAVERSE handles their accounting and other business needs such as payables, receivables, bank reconciliation, inventory, purchasing and order entry. In addition to Solomon, customer service reps, accountants, dispatchers, and technicians also use the system.

Solomon couldn't be happier with the solution. "The flexibility of the system has really allowed us to be more productive than we were before," he says. "The Ascente Service Management application has multiple screens that you can use, and each user can set up their screen in a different way, so it's very versatile."

Solomon elaborates on the flexibility. "You can enter a customer, choose to make the bill-to address different than the job site, change the bill-to, or have multiple bill-to's. For example, you may have a job site where the house is in the process of being sold. When you first get that customer, you're dealing with the original home owner and you can bill to them, but a month later it's being taken over by a new home owner. You can very quickly change the customer, yet all the history of the job site remains the same."



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Solomon also appreciates the tracking abilities that he has through various TRAVERSE reports. "Whether it's ad tracking, invoice tracking, sales tracking ... there are just so many reports you can base off of any criteria in the system, which makes it very easy to see where your money is coming from, and where you're spending it."

Like TRAVERSE, Ascente has a number of user-defined searches. Solomon especially likes one in particular. "If we have to return to a site, there's a lookup field and we can run reports based on call-backs. I haven't seen many other software packages that have user-defined screens like that."

The company is also using GPS software that is automatically interfaced with Ascente. "If a technician is within two blocks of his call, the system automatically notes that he has arrived," says Solomon. "That saves us time because we don't have to manually enter his arrival."

Ascente's tie-in to TRAVERSE is seamless, as Solomon explains. "If we want to look at the history of a call, everything is available to us from the call-taking screen in Ascente, so you can get to anything with just a mouse click. Let's say you want the history of a customer's receivables in TRAVERSE; you can get to that right from that one screen."

Solomon will soon be implementing the TRAVERSE Info-Alert application, a powerful tool that monitors data and provides automated alerts when certain business conditions are met. "We've started asking for email addresses from our customers when they call so that we can automatically send an email to confirm their appointment after it's made, and send them a reminder the day before."

Solomon values the reports that Compusource has set up for his company. "I like the fact that many of them are customizable, which gives you choices. The coolest one is the one we call the Coupon Report. We set up coupons as an inventory category – just like you would materials, flat rate tasks, or labor. We enter every coupon that we've entered as an inventory item. Each one has a negative value associated with it. Then when we do our invoicing, the coupon appears on it just like a piece of material would. It gives us the ability to have a custom report that tells us how many coupons were presented in a given time period, the total dollar amount of coupons used, etcetera. That tells us how effective that particular piece of marketing was.

Even with repeat business, we can sometimes tell what pushed them by looking at that report. And since I have a habit of looking at the income statement every day, I also like that in the financial reports, you can set up various reports to do things like compare this month's numbers to the same month of last year. You can set up so many different things like that and it only takes a second."

Lastly, Solomon notes the drill-downs in TRAVERSE. "They're so helpful if, for example, something doesn't balance or there's something out of place. You can just drill down to that level of detail, find it and fix it quickly."



*Technicians and Staff at Bruce Solomon
Plumbing, Heating & Air*