

TRAVERSE and Ascente: a Great Combination for Service Contractors

Gentry Air, Inc. is a Greensboro, North Carolina-based HVAC (Heating, Ventilation, Air Conditioning) company that services and sells HVAC systems and makes their own ductwork. Two separate buildings house 42 employees, with thirteen vehicles out in the field doing installation, including those for three superintendents, an owner, two shop employees, and six service techs. Gentry Air, Inc. struggled for years with an antiquated, custom-made, DOS-based system to handle their accounting and service management requirements, but three companies and two products joined forces to change all that.

Tom Buchanan, sales representative from Stateside Data, had contacted Gentry Air, Inc. Controller Debra Stevens about a year before she really got serious about finding a new system that would meet their needs. Stateside Data is a first generation, family-owned company—also headquartered in Greensboro—that resells and supports application software from Open Systems, Inc., including TRAVERSE. Stevens contacted Buchanan when the time for a change had come; among other things, Gentry Air, Inc. wanted to get up to speed with new technology. Using the Windows Server 2003 operating system as a cornerstone, Gentry Air purchased several TRAVERSE accounting applications from Stateside Data, including Accounts Payable, Accounts Receivable, and General Ledger.

Upon Buchanan's suggestion, Gentry Air, Inc. also implemented Ascente from Compusource Corporation, a solution for service contractors that is completely integrated with TRAVERSE. More than a call-taking and dispatch system, Ascente is a fully functioning office manager that handles a multitude of service functions. The service department at

Gentry Air, Inc. uses Ascente for billing and tracking service calls.

“This whole solution is such a robust system compared to what we had,” says Stevens. “Everything about it has helped us. Month end processes and financial reports are so much easier and faster. For example, I wasn't accustomed to being able to go back into the system and change things from previous months. If we are in July and something needs to be changed in General Ledger from June, we can just go in and change it. I wasn't able to do that before. But the thing I like the most about TRAVERSE is being able to pull up an account—say a cash account—and run it for a specific time period versus having to run every single account on your general ledger to find the detail I'm looking for.”

Debra also appreciates the functionality found in the Accounts Payable application. “When you do your processing, the system gives you a figure for each account,” she says. “It lets you know which account it's posting to, whereas before I had to manually go back in and double check for that. That's a wonderful feature to me. Another great



*Gentry Air, Inc. Controller
Debra Stevens*

capability that we have now in Accounts Payable is the flexibility of being able to go back in and hold and release the invoices.”

Ascente and TRAVERSE have been perfect running mates as well. At Gentry Air Inc., when a customer calls in to schedule a service call, the order is taken live on the phone and is entered into Ascente, which provides a grid to guide the call-taker through questions that need to be asked of the customer during the call. The next screen displays a dispatch board that indicates where each tech is at all times, what they’ve done that day, and what remaining jobs they have left to do. The board is color-coded; for example, red indicates that a service tech is late in getting to that appointment. The call is then routed to the appropriate service tech for the call, and then goes into a holding pattern. Service calls are billed through Ascente and transferred over to TRAVERSE. Transactions regarding new installations, furnace change-outs and administrative issues are billed through TRAVERSE.

“I was really expecting an all-out disaster when we changed systems, just due to the simple fact that we were going to something new,” says Debra. “But Daniel Parish from Stateside Data came in and worked with us and he was absolutely fabulous. He didn’t spend nearly as much time with us as I had imagined. It was so wonderful because he spoke our language. Sometimes computer people speak over your head, but he was able to train our staff members so that they could easily understand how things worked. It was amazing! He was very, very knowledgeable and knows TRAVERSE so well. I really have to give them a hand! We had about four days of training and were up and operating in such a short time frame – within a week. He came in on a Friday and converted our data over the weekend, came in on Monday and set us up and we were live by noon. We’ve had very few problems ever since.”



Tom Buchanan, Stateside Data



For additional information on TRAVERSE, call Open Systems, Inc. at (800) 328-2276 or visit www.osas.com.