Sage 100 Contractor

Customer Success

Smith Heating and Air Conditioning Stays in the Zone With Sage 100 Contractor

Founded in 1972, Smith Heating and Air Conditioning, Inc. is a successful full-service mechanical contractor specializing in the design, sales, installation, and service of Heating, Ventilation, Air Conditioning (HVAC), and Refrigeration systems. The company also operates a manufacturing facility that fabricates custom sheet metal products including stainless steel kitchen equipment. Commercial, residential, and industrial customers appreciate the high level of service, fair pricing, and quality workmanship provided and have perennially voted Smith Heating and Air Conditioning a winner in *The Record's Best Of San Joaquin* annual survey. For years, Smith Heating and Air Conditioning has trusted one solution to help keep its operations humming—Sage 100 Contractor.*

Embracing Technology

When Matthew Smith joined the family business in 1985, one goal he had for the organization was to embrace technology. "Back then, that goal took the form of computerizing some of our accounting tasks," he recalls. "As a result, we became early adopters of Sage 100 Contractor, which gave us a software toolset specifically designed for contractors."

Smith says the software continually evolves to meet the more advanced requirements of the company. "I have seen a tremendous evolution in the product, and its capabilities go far beyond accounting and financial reporting. We use it in our contracts, project management, engineering, and estimating departments too."

Streamlined Estimating

Integration between Sage 100 Contractor and Sage Estimating has vastly simplified the company's procedure for creating new project estimates, takeoffs, and templates. "We can pull equipment as well as items and their costs in from inventory," explains Smith. "It allows us to create formal proposals, presentations, and bids that are precise, professional, and complete."

*Sage 100 Contractor was named Sage Master Builder when Smith Heating and Air Conditioning initially implemented this solution. The product names have been updated in this case study to reflect current product naming.

Customer

Smith Heating and Air Conditioning, Inc.

Industry

HVAC Contractor

Location

Stockton, California

Number of Locations

One

System

Sage 100 Contractor
Sage Estimating

Challenge

Smith Heating and Air Conditioning needs to complete as many service calls and estimates as it can in a day in order to maintain its high level of service and maximize revenue generation.

Solution

Sage 100 Contractor and Sage Estimating is an integrated solution for accounting, estimating, job costing, and service, providing for increased efficiency and elimination of duplicate data entry.

Results

Efficiencies delivered by the solution enable the company to complete more service calls and effectively grow the business. A management dashboard provides quick access to vital metrics. Communication between departments is improved.

Sage 100 Contractor

Customer Success

Once a bid is won, the proposal is seamlessly converted into a job, bringing all cost estimates with it. "From there we are able to accurately track actual costs, comparing them to our budgets," adds Smith. "This helps us head off any over-budget situations."

Efficient Service Operation

The service department at Smith Heating and Air Conditioning also uses Sage 100 Contractor. The Service Management component of the solution is integrated with the accounting and operations components, eliminating the need to reenter data between systems. "Service Management keeps us well organized," says Smith. "We can schedule the right technician for each job, track the inventory, materials, and equipment used on every service call, and monitor our technicians' hours."

He adds: "Sage 100 Contractor helps us run as efficiently as possible, maximizing the hours in each day. We're able to complete more service calls and help more customers due to the efficiencies afforded by the software."

Hands-on Tools

Smith is a hands-on manager who appreciates the tools in Sage 100 Contractor that enable him to easily view key metrics and operational data from a single dashboard screen. "It's a very useful tool," he says. "It gives me a snapshot of the data I care about, and allows me to dig deeper into the data to uncover the details I need."

Promoting Internal Communication

Sage 100 Contractor also promotes and facilitates communication across departments. Because everyone has access to the same data set, staff from the accounting, purchasing, estimating, and service departments can efficiently communicate information about job statuses, technician schedules, billing details, and inventory levels.

"We are a professional service-oriented organization, and our customers have come to expect a high level of professionalism and thoroughness from us," says Smith. "Sage 100 Contractor helps us meet our customers' expectations by enabling us to closely

"Sage 100 Contractor has had a significant impact on our bottom line. It helps us to be more productive, more efficient, and more responsive to our customers. It has helped us grow our business."

Matthew Smith, president
Smith Heating and Air Conditioning, Inc.

monitor projects and respond immediately to customer concerns and questions."

Positive Impact on the Bottom Line

"Smith Heating and Air Conditioning has stayed with Sage 100 Contractor throughout the years as the company grew for one simple reason: It works," says Smith. "In my opinion, it is the perfect mix between accounting and construction software. I have actually compared the Sage 100 Contractor functionality to many other software packages available and have found none that match the capabilities of Sage 100 Contractor."

He concludes: "Sage 100 Contractor has had a significant impact on our bottom line. It helps us to be more productive, more efficient, and more responsive to our customers. It has helped us grow our business."

About Sage Construction and Real Estate Solutions

No matter where your business fits into the building lifecycle—new construction, service and maintenance, or property management—Sage offers a range of innovative software solutions that will fit your needs. With more than 40,000 customers, Sage construction and real estate solutions are backed by more than 40 years of experience and award-winning support.

About Sage

Sage is a leading global supplier of business management software and services for small and midsized businesses. The Sage Group plc, formed in 1981, was floated on the London Stock Exchange in 1989 and now employs more than 12,600 people and supports more than 6 million customers worldwide. For more information about Sage in North America, please visit the company website at: NA.Sage.com. Follow Sage North America on Facebook, Facebook.com/SageNorthAmerica, and Twitter, Twitter.com/sagenamerica.

15195 NW Greenbrier Pkwy | Beaverton, OR 97006-5701 | www.sagecre.com