

JobOps Keeps Business Flowing for Hanson Soft Water

CLIENT INFORMATION

Hanson Soft Water, Inc.

Headquarters

Menomonee Falls, Wisconsin

Industry

Field Service and Installation

Website

www.hansonsoftwater.com

Solution:

Sage MAS 90 ERP

Field Service and Dispatch powered
by JobOps

For more than 50 years, family-owned Hanson Soft Water, Inc. has provided water softening equipment, supplies, and service to residential and commercial customers. Hanson Soft Water continues to grow thanks to a traditional focus on superior service and modern investments in technology. One of the technology investments paying dividends for the company is Field Service and Dispatch (FSD) powered by JobOps.

Invest in Technology

While Hanson Soft Water had been running Sage MAS 90 ERP financial and accounting software for many years, their installation and service departments lacked the benefits of automation. "We used three-part carbon forms to write up our service tickets," recalls Tina Polk, co-owner of Hanson Soft Water. "And we recorded the history of those paper tickets on index cards. There was a lot of paperwork, a lot of handwriting, and too many opportunities for error or oversight. We were ready to invest in software designed for the installation and field service industry."

Polk placed a call to Sage to discuss options, and was told about Field Service and Dispatch powered by JobOps. Polk was referred to a JobOps Certified Partner with headquarters near Hanson Soft Water.

"Our JobOps partner did a thorough analysis and showed us how FSD could meet our needs," recalls Polk. "They were also able to help us maximize our investment in Sage MAS 90 by adding FSD, plus the



Sage MAS 90 Inventory, Sales Order, and Purchase Order modules."

Streamline Operations

Today, FSD is streamlining and simplifying every aspect of Hanson Soft Water's sales, service, and installation operations.

Full service history on all equipment sold or serviced is now retained in FSD rather than on index cards. This provided them with information regarding every service call, including complete costs and revenue associated with each activity. "We have a real understanding about which projects make us money," says Polk. "Studying that information helps us make better decisions going forward."

New installation orders are recorded directly in FSD, rather than being handwritten. This creates an electronic service ticket that stores all the information required to complete the work.

"All the details are recorded as we enter the service ticket in JobOps," says Polk. "It easily saves us 20 minutes time on each order.



“By streamlining, we are able to save the labor of one full-time person. Field Service and Dispatch powered by JobOps is paying for itself in efficiency and time savings every day.”

About JobOps

JobOps Job Management is a comprehensive solution for automating job management functions for make-to-order, installation, and field service and repair companies. It is the preferred choice for hundreds of North America's small and mid-sized businesses. JobOps is published by Synergistic Software Solutions, LLC, a wholly-owned subsidiary of BDO Seidman, LLP. For more information visit the JobOps Web site at www.jobops.com.

Plus, we no longer buy the expensive 3-part forms, and that saves us money too.”

The technicians record the parts and material used on the service ticket. This information is later entered into FSD to give the company true and accurate costs associated with each equipment installation.

Similarly, when a customer calls for service, staff is able to review the customer's complete sales and service history from within FSD. A copy of the service history goes with the technician on the call. “No more shuffling through the index cards,” says Polk.

When the technician returns from the service call, the notes of the visit are recorded in FSD and the service ticket is invoiced. With all the information already in the system, invoicing is completed rapidly, improving the company's cash flow.

“We've eliminated the handwritten forms and index cards,” says Polk. “And we have all the information about our customers, their equipment, and their service records at our fingertips.”

Simplify Daily Operations

FSD also simplifies the scheduling and billing of the company's regular salt deliveries. Each week the software automatically generates a delivery ticket for each customer, showing the quantities of salt delivered in previous trips to give technicians a good idea of what the customer will need.

Thanks to FSD, Hanson Soft Water now tracks the complementary service and inspection visits they make, and the

costs associated with those visits. “This is incredibly valuable information to have,” Polk says. “Before FSD, the overhead involved in recording this information meant that it just didn't get done.”

Rental Operation Gains Efficiency

FSD also is helping Hanson Soft Water manage the equipment they rent to customers as well. The equipment is tracked as an asset within FSD and all maintenance and repair costs, as well as revenue, are tracked within the system. This allows the company to determine the profitability of each piece of equipment over its lifetime.

The repetitive invoicing feature within Sage MAS 90 makes short work of the monthly rental invoices. “It's very fast and efficient,” says Polk. “We formerly used an entirely different software package just for our rentals.”

Reduce Overhead

“Field Service and Dispatch powered by JobOps is simplifying our business,” concludes Polk. “We've eliminated separate systems and manual ways of doing things, relying instead on efficient technology. By streamlining, we are able to save the labor of one full-time person. FSD is paying for itself in efficiency and time savings every day.”



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