



CASE STUDY



QUICK FACTS

<b>Industry</b> Mechanical & HVAC – Linc Service, Residential & Commercial	<b>Company Overview</b> Providing HVAC services to Northeast Pennsylvania since 1976	<b>Ascente Partner Since</b> 2013
<b>Headquarters</b> Drums, PA	<b>Previous Systems</b> Linc Software	

BACKGROUND

Energy Technologies Inc. is an HVAC service business specializing in heating and air conditioning, heat pumps, ventilation, air treatment, and refrigeration. They are also a Linc service franchise, which allows them to offer the integrity of a locally-owned business in combination with the expertise of a vast network of professional HVAC service companies. Energy Technologies is dedicated to using the latest HVAC technological advances in a practical and cost effective manner to provide their customers with

exceptional heating and air conditioning service. With that being said, they primarily focus on commercial service, which makes up about 80% of their business, with residential service making up the remaining 20%. As Energy Technologies continued to grow and evolve as a business, so did their software requirements. They determined that if they wanted to improve their overall business processes, a new software solution would be necessary, and that solution was Ascente.





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## RECOGNIZING THE PROBLEM

Prior to transitioning to Ascente, Energy Technologies was using Linc as their software system. After using the Linc software for a few years, Energy Technologies began to realize that the software was no longer meeting the needs of their business. "The Linc software ran on old UNIX technology, which quickly became outdated," stated Daniel Johnson, General Manager at Energy Technologies. "We regularly had issues with the software being down and experienced outages almost daily, not to mention that the software itself was very limited in its capabilities." The mobile add-on Linc offered was difficult for the technicians to

use and did not integrate well with the system either. Energy Technologies found themselves spending more time on technical problems instead of running the business. They also found themselves using multiple software solutions, which not only cost them money, but also led to a lot of duplicate entries for technician service hours and service orders to create invoices. The Linc software was quite cumbersome to use and lacked integration throughout the software, which made it challenging to complete even the most basic tasks. With all of these difficulties mounting, it became clear to Energy Technologies that a change in software was required.

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## ASCENTE TO THE RESCUE

Since making the switch to Ascente, Energy Technologies has been able to streamline operations and improve their business overall. They have experienced vast improvements in the way they are able to manage and operate their service operation. One main area of improvement has been in their service billing, as Daniel Johnson stated, "Prior to Ascente, we had one accounting staff member spending about 80-90% of their day copying and pasting data into the system to prepare and send out our service billings. With Ascente, this has effectively been eliminated and the process is much more streamlined now." Also, the process of scheduling a call is much easier and the

dispatching process has helped improve their overall customer service as well. Due to the efficiencies gained with Ascente, Energy Technologies would be able to grow their business by about 50% without having to add another dispatcher. It is much simpler and quicker to generate service reports within Ascente, which they can bring to their customers to provide greater levels of detail and help service them better overall. With a more integrated service operation, Ascente has provided Energy Technologies with a solution that meets their needs and truly provides them with a competitive advantage as compared to other contractors within the industry.

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## BENEFITS

One main benefit Energy Technologies has experienced since transitioning to Ascente has been the mobile capabilities. "Our technicians love Ascente's mobile solution," stated Daniel Johnson. "The process of using mobile with Ascente is so simple and straightforward, we truly can't imagine going back to life without mobile devices." Prior to implementing mobile, it would take about 2 to 4 weeks to get invoices sent out, which are now sent out the next day with Ascente. The mobile solution allows technicians to properly select or add

equipment to each work order, and they are now able to access previous work history to know what work is required even before arriving at the service location. Their day sales outstanding has also decreased from about 45 days down to 32 currently. Another benefit Energy Technologies has realized since switching to Ascente has been in their inventory. The dollar amount of inventory they need to carry has decreased by two thirds and they have been able to reduce inventory turn by half as well.



## ASCENTE IS THE PERFECT FIT FOR LINC CONTRACTORS

When it comes to building your maintenance base, or service contracts, Ascente is a perfect fit. "Ascente allows you to enter a contract, automate the scheduling of your maintenance services, perform tasking, and easily complete financial reporting on profitability for any Linc contract," stated Daniel Johnson. "We are just so thrilled with Ascente and have recommended the software numerous times, especially within

the Linc network." The customizable nature of Ascente allowed Energy Technologies to create financial statements that look identical to how they were in the Linc software, which also helped make the transition from the Linc software to Ascente even smoother. Also, Ascente is easily adaptable for other Linc contractors to setup, as the accounting format and processes are similar to the Linc software.

## CONCLUSION

Since partnering with Ascente, Energy Technologies has been able to streamline all aspects of their service operation. From service billing, to scheduling calls, to dispatch, Ascente has provided Energy Technologies with a solution that not only helps to improve customer service, but also provides them with a competitive advantage. With the easy-to-use, intuitive mobile solution from Ascente, technicians are able to be more productive and employee satisfaction has increased tremendously. With mobile, Energy Technologies is able to send invoices out faster,

which has helped decrease their billing cycles in the process. They have also been able to improve the efficiency of their inventory, helping them save money and reduce inventory turn as well. With Ascente being such a great fit for Linc contractors, the transition from the Linc software to Ascente was seamless, and Ascente's customizability made the process that much more efficient. Switching to Ascente proved to be the right decision for Energy Technologies, as Daniel Johnson stated, "We're in heaven compared to what we had previously."

## ABOUT COMPUSOURCE

Founded in 1971, Compusource has evolved into a leading developer and marketer of application software, computer equipment, and training/support services for the markets it serves. We have achieved success through professional partnerships with our customers where the central focus is on long-term mutually beneficial relationships.

Headquartered in La Palma, CA, with an Eastern Regional Office in Norcross, GA and a Southwestern Regional Office in Dallas, Texas, Compusource employs trained professionals that provide prompt and comprehensive support to clients throughout North America.

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