

The Customer

National Services provides mechanical services to retail customers in North America, helping them to manage, maintain and repair their heating & cooling, refrigeration, plumbing and electrical systems.



The company delivers its services through a nationwide network of pre-qualified sub-contractors.

The Business Need

National Services manage their core business processes using an in-house application, which automates the processes associated with creating and managing work orders: from initial customer contact through contractor selection and dispatch to customer billing.

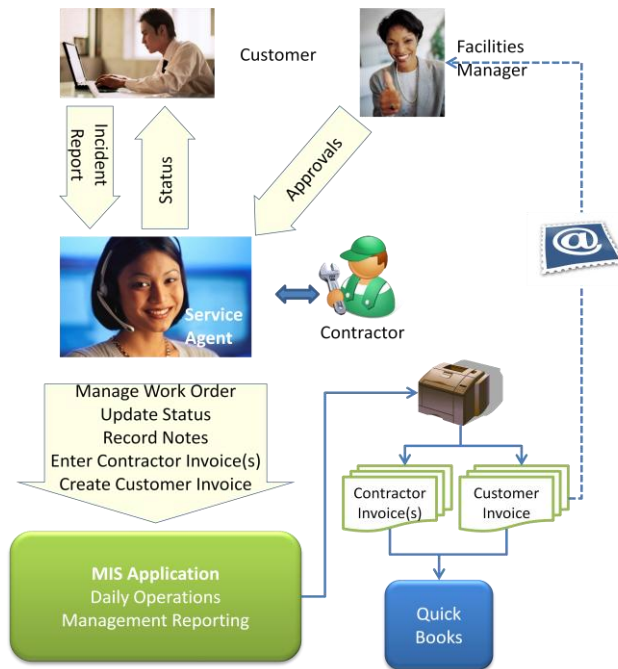


Figure 1 – Business Process Overview (Before)

The company’s primary accounting and finance functions, including revenue tracking; customer account balances; and vendor payments, are managed by QuickBooks. To support these

tasks: customer and contractor invoice data from the in-house software was manually re-keyed into QuickBooks.

National Services saw this manual process as a bottleneck that could limit future growth, and had also identified it as the cause of transcription errors, with the potential for misleading financial analysis and even erroneous bill payments.

The Solution

Avatar CTS first reviewed and mapped out National Services business processes in detail, in order to better understand the existing manual process steps. Subsequently, a new application module was designed and developed to automate these processes.

The new application allows National Service’s management to review all outstanding work orders and their contractor and customer invoices.

“Before working with Avatar, our invoicing process was painful and, quite frankly, we made too many mistakes. Now we process invoices much more frequently; with less effort; and without those costly errors.

When the new module was installed, I was pleasantly surprised to find that all of our requirements had been addressed, including some that we had not even anticipated at the beginning of the project.”

Michael Howes, President, National Services Inc., Phoenix, AZ.

The new application will print all approved customer invoices (previously each customer invoice had to be printed individually); and will then automatically transfer both the customer and contractor invoice data to QuickBooks.

