

Unleashed Efficiency: How Results Streamlined Operations with Workflows and Integrations

PROBLEM

Advanced Mechanical USA, an end-to-end HVAC company for new construction, needed a system to help them organize and track their complex, custom, multi-unit, and multi-phased installations. The company needed a system to automate their segmented processes, support their continued growth, scale efficiently, and integrate with QuickBooks Enterprise.

WHY RESULTS?

Advanced Mechanical USA (AMU) engaged Process Distillery, a Results Partner and business strategy firm, to optimize their business processes, select the right system, and oversee implementation. After conducting an RFP process, Process Distillery chose Results for its flexibility in managing projects, field services, and operations. Results offered a crucial web-based integration with QuickBooks Enterprise, the key to automating the company's operation.

SOLUTION

By using the native QuickBooks Enterprise integration, AMU eliminated double data entry and reduced manual tasks. The integration allows detailed information to flow seamlessly from estimates to sales orders to projects. This real-time visibility enabled better decision-making, faster issue resolution, and ultimately, more profitable projects. And by integrating the Results API with the Operations Distillery App from Process Distillery, AMU is now able to more effectively stage materials from inventory for each client project, reducing punch lists and subsequent visits. Additionally, workflow dependencies in Results automated the rescheduling of realistic tasks, further saving valuable time and effort. Team members in the field have the information and documents they need onsite to perform their jobs.

AT A GLANCE

Results Solution

Field Service Management

Industry

HVAC

Number of Users

40

Integrated Apps:

- QuickBooks Enterprise
- Operations Distillery

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Working with Process Distillery and Results has been a transformative experience for our organization. We've eliminated paper processes, avoided double entry across systems, and empowered our field crews with real-time data. I highly recommend the platform and the two companies.



KIM MCLAUGHLIN

Controller, Advanced Companies

BENEFITS

Project and Document Visibility

With a 360-degree view of operations, the entire AMU team benefits from complete transparency on every project. Employees can provide customers with up-to-date project status information and clearly explain any delays, ensuring a seamless and informative experience. Additionally, office staff can select certain document types, such as floor plans and permits, to automatically attach to Activities, ensuring field technicians have everything they need to do their jobs efficiently.

Detailed QuickBooks Integration and Project Automation

Advanced Mechanical streamlined its operations by leveraging QuickBooks integration, including importing "classes" into Results so they can automatically segment project phases. Sales orders with over 150 line items, which detail all the building customizations and material specifics, no longer require manual entry. All specifications and customizations are captured seamlessly, ensuring everything brought into Results is ready for scheduling.

Less Data Entry via Field Merge

AMU utilizes field merge functionality to import essential project information directly into each assigned activity. This enables technicians to easily access the address and other project-level details on their tickets, eliminating the need for dispatchers to retype information.

Easy Rescheduling of Dependent Tasks

Each phase of a project is assigned a designated activity in Results, enabling AMU to ensure that no phase begins until the previous one is marked as complete. If a project is delayed, workflow dependencies automatically reschedule all subsequent phases, eliminating the need for manual adjustments and saving the team hours of work.



PARTNER HIGHLIGHT

Process Distillery is not your typical Business Strategy Firm. Their approach melds the concepts of business strategy business consulting and technology consulting to help companies make more money. Let Process Distillery and their team of over 70 resources help you leverage the power of the Results Platform, optimize your business processes, and optimize your workflows and data flow.

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