MyAssistant identifies problems and saves time for specialty contractor

Hunter-Davisson, Inc. has over 40 years history in the design, installation, repair and maintenance of heating, air-conditioning, refrigeration and ventilation systems in the Portland, Oregon area. David Wright, Vice President and Business Manager for Hunter-Davisson Inc. implemented MyAssistant in 2006 and reports: "MyAssistant is a system that is proactive versus reactive. It tells me what problems need to be fixed, which saves us considerable time."

"For example, a few of the many MyAssistant Tasks we have set up are:

- Ensuring that all costs codes are flagged for billing: "We input costs everyday into our Timberline system. While they should all be flagged for the billing module, sometimes they aren't. MyAssistant now sends me an email each day of the few exceptions so that we can quickly make sure we bill for all billable costs."

- Timely invoice delivery: "MyAssistant lets us know when a customer billing cutoff date is approaching so we aren't late sending our invoices."

- Sending timely Prevailing Wage reports: "We need to send a weekly prevailing wage report to the general contractor on all prevailing wage jobs. In the past, I would use recurring Outlook reminders for these jobs. As we added and finished jobs, maintaining these reminders were cumbersome to manage. Now MyAssistant sends me a weekly notice of open prevailing wage jobs requiring this report."

- Monitoring Accounts Receivable balances: "When I'm reviewing a detailed aging, I don't want to look through a 50 page report to find the significant accounts requiring attention. I now receive an email from MyAssistant showing me the largest accounts past due. This allows me to spend my time where it's needed most."

- Maintaining customer relationships: "We use MyAssistant to notify our Preventive Maintenance manager of final billing on a job. He then knows it's time to present a proposal for preventive maintenance. This helps us continue the relationship while obtaining new service business. The salesman on the job is also notified so he is in the loop on his accounts."

- Ensuring credit is received: "We create a credit PO. If the credit PO is still open in 30 days, MyAssistant notifies us so we can call the Vendor and learn why we haven't received our credit."

- Customers over credit limit: "MyAssistant automatically provides a list of customers that have exceeded their credit limit."

- Ensuring employees are setup correctly: "For example, we learn if hourly employees are setup without a 'WC' auto fringe, have an incorrect Tax setup, or do not have a driver's license, insurance, vacation, or disability entered."

David used Innovative System Design to help implement and support MyAssistant: "They've been responsive and get the job done right."

"MyAssistant is also built along the line of Timberline—it is very customizable so you can tailor MyAssistant to meet your needs. If the data is in the Timberline system, there's very little you can't do."

CUSTOMER
Hunter-Davisson

INDUSTRY
Commercial Mechanical

LOCATION
Portland, OR

INNOVATIVE SOFTWARE DESIGN