North Mechanical Service gets best of both worlds with Fieldpoint and CMiC integration

North Mechanical Service, a new or retrofit contracting and construction services company in central Indiana that specializes in HVAC, refrigeration, controls, and plumbing repairs, was already using CMiC construction software when the need came up to pair it with a field service solution.

There were options to get an all-in-one software, and upon doing research on their own, they did find some alternatives that could satisfy many of their needs.

However, upon further review, what North Mechanical Service found is that as they dived deeper into each module of the all-in-one solution, they were sacrificing functionality, either in the accounting portion, or the service management side, specifically with project management and the dispatch board.

And that just wasn't something they were willing to do, especially with options on the market that would give them everything that they wanted and needed to run a successful service operation.

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"We weren't willing to settle and wanted the best of both worlds," said Hannah Peacock, Business Process Coordinator, North Mechanical Service. "Not only from a robust accounting software that has everything and anything you need from accounts receivable, payroll, accounts payable, project management and everything within the standard functioning of CMiC, but we also wanted the nimble, extremely flexible, highly customizable software a service company needs because we never really know what our clients are going to demand of us."

Not only did North Mechanical Service want a field service software that could handle anything their clients asked of them, but they also looked for one with less training required, as they were going to go live with their software during a busy time for them.

Integrating CMiC and Fieldpoint to Share and Capture Data

After working with a consulting company, North Mechanical Service chose Fieldpoint to deploy their field service software and integrate it with CMiC. This way, they would literally get the best of both worlds.

CMiC would handle all of the accounting efforts, including payroll and accounts payable and receivable, while Fieldpoint would be used for project management using their extensive project module, as well as dispatching capabilities such as the scheduling module and resource routing tools.

The added benefit for North Mechanical Service's accounting department is that they didn't need to learn Fieldpoint, as their work would still be completed within the CMiC ERP and accounting software. And with the bi-directional integration between Fieldpoint and CMiC, information from Fieldpoint would populate into the CMiC software, without the accounting department having to enter Fieldpoint themselves. This reduced training time for North Mechanical Service when deploying their field service solution.

"We had the flexibility with the Fieldpoint software to mimic our old software but gain so many enhancements throughout the process," said Peacock.

One of the immediate benefits of deploying the integration was removing manual data entry in several areas, including job creation in CMiC and the manual invoice entry they were doing before. In an older system they

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used, they had to create customers in both software solutions, meaning they might enter the same information more than two times, which could lead to errors.

"It was sometimes duplicate, triplicate, and sometimes quadruplicate data entry when we were working offline in our spreadsheets as well," said Peacock. "Through the integration, we automated that process which reduced our auditing times, which goes back to our time savings, which everyone hopes to gain from an integration."

Master data resides in the CMiC software, and for North Mechanical Service, acted as a consolidated source for all their accounting needs. Especially with contracted services or

Fieldpoint Complements CMiC

Through their discovery of different field service software applications, Peacock said they looked at 35 different applications before narrowing it down. What they found was that many of the software solutions were focused on contracts or single services, but weren't able to do them well, because they have such diverse business needs.

With Fieldpoint, North Mechanical Service got software that was dedicated to providing the best field service software, without diving into anything accounting-related. Along with the dispatching calendar and routing tools, Fieldpoint gave North Mechanical Service client equipment history, the ability to see the service history of every piece of equipment and get the complete work order records.

Peacock said that with Fieldpoint, the purchase order process was expedited and made easier, and now on projects, they can bill for time and material and make schedules for progress billing. And with workflows built, they can instantly turn a quote they produce in Fieldpoint into a project within the same platform, while simultaneously having the project set up in CMiC.

"It's in real-time for us. Whatever we do in Fieldpoint, it's integrated right away in CMiC," said Peacock. "Because there is no delay when it comes to labor cost visibility, as our technicians in the field are saving their hours for those service appointment calls, we can see instantly the number of hours they have saved because their mobile is syncing upon

sister companies, it was easier to house all the data in one accounting software. Through the integration, North Mechanical Service would be able to transfer that data to the Fieldpoint software to be used for service and projects, ensuring the master data remains in CMiC, but is accessible to other divisions when needed.

"It was just hands-down a great way to go for us to an integrated platform than an all-in-one," said Peacock. "We have visibility of almost all of our data in the administrative view in our office, and all that information is available on mobile. And if you don't see it, it's easily renderable. I got the hands-on training with Fieldpoint where you can create your own fields in design view, put them on the form and make them visible and immediately save data. It takes minutes. It's such a quick and easy way to control your data because you just never know what you are going to need to capture tomorrow."

saving. So, this allows us to make real-time decisions on whether we should send an extra technician the next morning. This is tremendous value when making sure those already slim service call margins remain profitable."

Customization improves data analytics

North Mechanical Service's customization in both systems allowed them to add form layouts, user-defined fields, and workflows to control the flow and collection of data that was useful to them. This is what made the integration option appealing and why they ultimately went with Fieldpoint and CMiC as an integrated package, rather than an all-in-one option.

Peacock and her team could quickly adjust how to capture data without a programmer required, meaning as their data needs changed, they could change the workflows to match their needs.

"The end-user has the flexibility to control the performance of their data analytics, basically to improve their bottom line," said Peacock. "Everything is out-of-the-box in both programs, so with everything on either side of the house, both users can get the benefit of all that information."