

# anterraBI™ Customer Success Story

## Total Comfort Solutions



### INNOVATIVE HVAC SOLUTIONS

Total Comfort Solutions offers the skilled development and delivery of innovative Heating, Ventilation, and Air Conditioning (HVAC) solutions to clients across South Carolina and eastern Georgia.

They serve all industries with a specialization in mid- to large-sized facilities in the healthcare, industrial, technology, institutional, and office markets. Total Comfort Solutions' affiliation with Linc service network keeps them on the cutting edge of industry trends.



### THE BENEFITS

- Better customer service attributing to real-time information
- Consolidation of AR balance from seven different office locations
- Self-service report-pulling capabilities from any device
- Standardized Viewpoint integration for all locations

**"When you put 15 people in an email to try to get something paid, no one takes ownership. We really needed to find a visible solution to manage our AR process."**

— Andrew Patterson, Director of Finance

### THE CHALLENGE

As a franchise, Total Comfort Solutions currently has seven locations with ~700 contracts and thousands of customers. They often serve the same customers at every different location, resulting in multiple AR balances. Understandably, visibility into the different business groups is complicated, especially using seven different kinds of Accounts Receivables files.

Total Comfort Solutions uses Viewpoint for construction accounting, so Andrew Patterson, the Director of Finance, searched for Viewpoint integrations and found AnterraBI™. Andrew explained, "I travel a lot, and it was really difficult for me to understand what was going on financially at the company without getting a daily download from staff on cash collections. We have seven different offices. I wanted to go to a single website, pull up a report with our consolidated AR balance, and not seven different reports."

## THE SOLUTION

Total Comfort Solutions wanted to assign collection items to salespeople and manage the status of collections, and AnterraBI™ helped to solve that.

Andrew has the ability to view a complete snapshot of every invoice due, across the companies. AnterraBI™ has literally saved Total Comfort Solutions the cost of hiring a full-time-employee to perform low-value tasks like collection reminder emails, entering data into Excel, and consolidating reports.

Security was another concern which Anterra alleviated. As a franchise, there was a need to legally protect data internally, within the companies. The Anterra team set up a customized sync structure with Viewpoint that fulfilled the requirements to all parties' satisfaction.

"Bruce and his team did a good job getting through all of those hurdles." Andrew stated. "On my end it was very seamless. We didn't have to do anything."

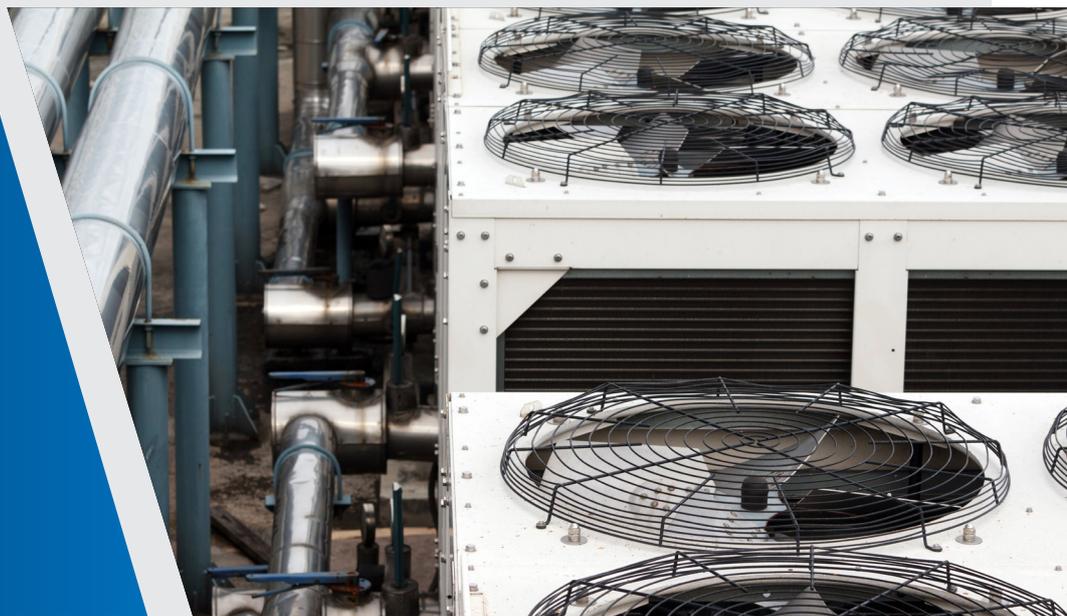
Anterra provided an unexpected value-add for Total Comfort Solutions. Andrew discovered that the company was able to deliver better customer service because they have access to better real-time information. Now that everyone is cloud-based, they manage their AR through action items, notes, and reports. Ultimately, that makes the Total Solutions experience better for users and customers alike.

**"We found that Anterra was the right fit for what we wanted to do with our AR. Anterra is willing to grow with us. I don't have any concern that as we continue to expand we will continue using AnterraBI™ seamlessly."**

— Andrew Patterson, Director of Finance

**"After just one hour of training we were making action items and customized reports. It took no time at all to get up to speed in Anterra!"**

— Andrew Patterson,  
Director of Finance



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