

The McCormick Letter

The Nation's Leader in Estimating Software

www.mccormicksys.com

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A McCormick First:

Put A "Signable" Electronic Work Order Into Your Service Electrician's Hands



As you know, T-Bill from McCormick Systems is our time-and-material billing system. At the NECA Show in October, we rolled out a new, second option—an interface with the handheld Personal Digital Assistant (PDA)—that enables you to put an electronic work order form in the hands of your service electricians and technicians.

Users of T-Bill will know that in that program you have the ability to create a work order. It can be printed out and handed, as a blank, to service workers or anyone working under a time-and-material contract. Obviously, you can print out as many of these "blanks" as you need.

What we've done is to format just the work order portion of the T-Bill software (not the full system) on software for a PDA. Here's how you can use this:

1. Give your service tech a PDA.
2. As he or she does service work, a work order can be created for each job. Material can be entered. Labor hours can be entered. Specials can be entered.
3. An important feature is that the customer can SIGN the work order, right there on the PDA. This "electronic capture" of the customer's on-

This "electronic capture" of the customer's on-the-spot signature comes in handy later on.

4. There are **three options** for downloading the work order from the service tech's PDA:
 - a. When he or she is done with a workday, the PDA can be returned to its "cradle" and the information downloaded from the handheld unit to the "master" T-Bill program on your office computer.
 - b. If you choose a wireless PDA set-up, the service technician won't have to return to your office. He or she can wirelessly transmit the work orders—either one by one (as they are done) or as a batch at the end of the day. With this wireless option, the service tech does not have to return to the office to get the information to you.

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c. If your service person has a laptop and a printer, he/she can print out the workorder for the customer, on-site.

“We’ve been working on this idea for about one year,” says President Todd McCormick. “From the founding of our company, we have believed that our job is to help contractors make more money. We think we’ve come up with another way, using the handheld PDA, for contractors to cut costs, time, and effort.”

How would the use of T-Bill work orders on a PDA help your company? Here’s a scenario that could be implemented by almost any electrical contractor, large or small:

A. Give a PDA to your service tech.

B. After the service tech does a time-and-material job, he/she notes the labor hours (put in by her or her and a helper or crew), the materials used, and any specials—right on the PDA. The service tech can do this by writing with a special pen or by having a keyboard pop up on the PDA’s screen and inputting the information that way.

C. When the work order is complete, your service tech can ask the customer to sign the Palm’s screen. That signature is stored with the work order.

D. The work order is transmitted to the McCormick Systems T-Bill software in your home office, either by putting the PDA in a cradle or using wireless transmission.

E. You’ve saved time on inputting back at the office. There are no mistakes in transcribing the service tech’s paper work order to the computer, as there is no need for paper.

F. You generate a bill to send to the customer using T-Bill—and that bill now, for the first time ever, includes the customer’s signature as placed originally, right on the PDA. As you know, it’s not possible without this system to take the customer’s signature off of the work order and put it into the computer (short of scanning each work order on a separate flatbed scanner).

Plenty of Advantages

In the scenario detailed in A-F above, you’ve eliminated re-inputting of work orders, saving time and money. You’ve eliminated mistakes in transcribing work orders, which can save large or small amounts of grief. You’ve ended confusion on the customer end—“who signed for this work order?”—by capturing the customer representative’s signature.

Further, there is a chance here for your company to speed invoice processing. Assume your service person did a job on a Tuesday morning and wirelessly transmitted the work order before lunch. Your billing person could put the bill in the mail Tuesday afternoon. Few, if any, electrical contractors enjoy the cash-flow gains of same-day billing!

Other advantages may well stem from giving PDAs to your service electricians and technicians. Note that the McCormick software takes up only about 2% of the storage space on the machine, so you could put other key information on the unit—phone numbers of local distributors, schedules for the service person, material lists, and much more. Additionally, if you opt for a wireless PDA, you could include the WESCO or GE Supply wireless ordering systems that are now available.

“We know the future is going to be electronic, and we’ve created this PDA option for the contractor who wants to cut expenses on service and T-and-M work,” says Todd McCormick. “We can even envision an electronic, wireless future, in which the service person gets his or her assignments wirelessly from headquarters, and after a work order is complete, headquarters transmits the next workorder. It’s even possible that service techs might even have driving directions to the next location downloaded to them at the same time!” ✕

For more info on PDAs, see page 4

McCormick Is Where You Are... at Industry Trade Shows

BICSI Winter Conference

Orlando, Florida—January 21-24, 2002

Electric West

Las Vegas, Nevada—February 11-13, 2002

User’s Conference Dates

McCormick Systems has booked its annual user’s conference for April 10-13, 2002, at the Embassy Suites hotel in Tempe, AZ. Our schedule so far includes a golf tournament in the morning on Wed., April 10; a reception in the evening on Wed., April 10; and the conference, itself, which continues from Thurs. through Sat., April 11-13. *To receive a registration form, contact Loriel McCormick via phone at 800-444-4890 or via e-mail at lmccormick@mccormicksys.com.* ✕

Did You Know... Do you find that you are creating that same temporary item a bit too often? Move it into the permanent database with our move/copy/paste functions, found under the Tabs/Utility dropdown.

Small Contractor Gains Volume & Peaceful Sleep With McCormick Estimating Systems

Sometimes, Monte McClanahan would come home late from work at M&W Electric in Salina, KS, after 7 p.m. (or even later). On some of those days, when he finally got to bed, McClanahan would bounce instead of nodding off—wondering if he had left out anything important (like switchgear or the fire alarm system) in a bid that had been submitted that day.

Those times are gone. They ended in 1998, when M&W, after careful review of all of the options, selected McCormick Systems' Windows 3000 estimating system. Today, the company, which ranges in crew size from five to 12 electricians in the field, uses the Windows 6000 system.

McClanahan is the company's estimator and project manager, spending about 75% of his work time doing estimates. Before the 3000, McClanahan and his boss Mike Weaver relied upon estimating done on slips of paper. "Now, we can finish up a project and never, ever look back. We've had a great boost in accuracy," says McClanahan.

More Bids—More Work

These days, whenever there is something important that must not be left out of a bid, McClanahan includes it in his bid summary. "It may be a global thing that I have set up or it may be a very specific item that I've set up just for a job," he says. "Since we put the system in place, the increase in accuracy has been incredible."

Another key increase for M&W Electric has been bid volume. According to McClanahan, the Salina market has a high ratio of available electrical contractors to the work available. There are more than 20 contractors to serve a population of about 45,000.

"It's very competitive, and we've noticed that the amount of work we are able to win is directly proportional to the amount of jobs we are able to bid," he says. "With the McCormick system, we have been able to bid so many more projects because of the time savings.

"As a matter of fact, the percentage of jobs we win has gone up, because we are more accurate. And the number of

jobs we win has gone up because we are able to bid more jobs. The best thing is that even though we are bidding more jobs, I often get to go home on time—at 5 o'clock—because I've gotten the bid work done that I need to do."

According to McClanahan, a key feature of the Windows

6000 system that he likes is the adjustable audit trail. "It's really handy," he says. "Before, we weren't able to adjust the quantity of items taken off as we were going along. But now, with the advanced audit trail, we're able to do that. It saves a lot of time."

Moving to the Machine

M&W pursues some specialty work. One prime example is its relationship with Toys R Us. M&W does work on automated conveyor system installations at Toys R Us warehouses all over the country. Despite M&W's relatively small size, Weaver decided that his company needed to move into the computer age late in the last decade.

"We had experimented with doing some office work on the computer, when my boss (Mike Weaver) decided to look into computer estimating," says McClanahan. "He did some pretty extensive research into the available systems, and he came up with McCormick Systems as being the best in the business. Now that we've used it for several years, we're convinced that it really is.

"We went with the Windows 3000 system at first, because of the cost. It took about six months before we decided to move to the 6000. We decided it would save us time, and it did. You know, just a little thing, like the ability to have a lot of windows open, can make a big difference."

With the combination of speed, accuracy, increased bidding volume, and a higher percentage of successful bids won, the folks at M&W Electric are sold on McCormick. "We probably spent more on this system than we could have on some other system," says McClanahan, "based on my boss's analysis. And it's been worth it.

"You couldn't pry our McCormick estimating software out of our fingers!" X

"We probably spent more on this system than we could have on some other system... and it's been worth it."

Technical Corner

What Is a PDA?



A PDA (Personal Digital Assistant), sometimes known as a Palm Pilot, is a small handheld device with its own operating system and application set that has superseded the paper-based organizer and the more basic electronic organizers.

Why Should I Consider Using a PDA ?

There are several reasons to use a PDA, or Palm Pilot, including:

1. PDAs are taking over many of the tasks that were formerly the domain of laptop computing;
2. PDAs can be synchronized with your desktop/laptop systems, which offers you the ability to use many of the more common applications anywhere;
3. PDAs are a low-cost, highly portable alternative to laptop computing if the end user does not require the use of sophisticated applications.

You may well find many other reasons as well. For example, electrical distributors such as WESCO and GE Supply are offering from-the-field ordering options using PDAs.

What Choices Are Out There?

In today's user environment, 85% of all PDAs use the Palm operating system (OS). These handheld units are manufactured by vendors such as Palm, Visor and Sony. The other 15%—from manufacturers such as Compaq, HP, Casio, Psion, or Diamond—use either touch-screen versions of a Windows OS or keyboard-based versions of Windows applications.

What Is All of This Going to Cost Me?

Palm OS-based computing starts from \$99. Many of the applications are available as shareware.

What Does McCormick Have to Do With All of This?

McCormick will shortly be offering an all-new singing and dancing Palm OS-based interface! Actually, as outlined in this newsletter, we do have an important application for use by field personnel—for Time and Material Billing. ✕

Get Ahead With Training

Standard Estimating

It is structured to take you from "Job Startup" clear through "Bid Summary." In-depth instruction helps students with good manual experience get up on line.

Advanced Management

This class is designed for the database manager or chief estimator. Students attending this three-day class will drill down into the bottom of the program and learn how to build specification formulas, reports and reports formulas, keyboard mapping, setting up security, and more. You should be proficient in all takeoff phases of the McCormick product.

Upcoming Schedule

Most classes are held at McCormick's training center (generally from 8 a.m. to 5 p.m.) in Chandler, AZ. Class sizes are limited! Contact Jody Dougherty or Loriel McCormick at 800-444-4890. ✕

Nov. 28 – 30

Standard Estimating Class

Dec. 5 – 7

Standard Estimating Class

Dec. 12 – 14

Standard Estimating Class

**Watch for our
2002 Training Schedule,
coming out soon!**



McCormick Systems joins all of our fellow citizens of the United States in our determination to continue business as usual after the attack on our country.

We're proud that our software is 100% Made In The U.S.A.!