



## CUSTOMER SPOTLIGHT

# Leigh's Heating and Cooling



**WEX Field Service Management makes everything easier—for the techs, the office, and our customers. From invoices that link right into QuickBooks to reporting that shows us exactly what's happening in the business, it saves us time every day. Plus, the customer-facing features like reminders have made our service experience even better.**

- Nick Harman, Leigh's Heating and Cooling

## About Expert Heating and Air

Leigh's Heating and Cooling has been a family-operated business for over 32 years, proudly serving the Myrtle Beach and Horry County areas. Specializing in residential service and new construction, the company is committed to delivering the best HVAC service across the Grand Strand while preparing to expand into additional locations.

## The Challenge

Before switching to WEX FSM, Leigh's Heating and Cooling was struggling with inefficiencies using Service Fusion. Scheduling was difficult to manage, reporting lacked depth, and financial processes were cumbersome.

Creating invoices took extra steps, and it was hard to maintain a steady flow of calls or adjust daily operations. This slowed down the office and left technicians and customers with a less-than-ideal experience

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## The Solution

Nick and his team chose WEX FSM after hearing about it from a trusted contact. WEX's onboarding support and training for technicians and office staff made the transition easy. The solution provided a much more user-friendly system that simplified daily operations.

Now technicians directly create invoices in the field and sync seamlessly to QuickBooks, saving time and eliminating manual work. Advanced reporting tools give the business insight into technician sales, product performance, and overall operations.

On top of that, automated appointment reminders and real-time updates created an improved customer experience, making the process more professional and customer-friendly.

## The Results



### Time Savings

Invoices are created instantly and sync to QuickBooks, eliminating extra work.



### Stronger Customer Service

Customers receive automated texts and reminders, improving communication.



### Operational Efficiency

Scheduling and call management are now smooth and organized.



### Better Reporting

Visibility into technician and product sales has helped the company manage performance and growth.



### More Customers Served

The team can focus on serving more customers with less time spent fixing backend issues.

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## About WEX Field Service Management

WEX Field Service Management offers a simple, efficient, and well-supported solution, helping you get organized, save time, and scale your business with confidence.