

WEX® FSM drives 3x Sales for HVAC Business

WEX® Field Service Management (FSM) provided the essential technological foundation for Andersen Heating and Cooling to scale operations and exceed growth expectations.

The Customer

Andersen Heating and Cooling is a residential HVAC company. Its sales division needed a modern, unified platform to replace manual systems capable of supporting sustained market growth. They chose WEX® to streamline its processes, reduce risk, and generate revenue.



Their Challenges

- **Outdated, DOS-based systems** and manual, three-ply carbon-copy invoices limited sales capacity and speed of data retrieval for the team.
- **Inefficient tracking** made it difficult to maintain cash flow during slow seasons and accelerate slow payment collection.
- **Operational inefficiency** with manual paperwork slowed technician workflows and restricted quick, targeted marketing capabilities.

Switching from our old three-ply carbon copy invoices and going to live invoicing has really opened up our average ticket sales. We've almost tripled our average ticket sales, which is amazing.

JENNIFER HELMS
DIRECTOR OF SALES AND OFFICE OPERATIONS



WEX Solutions

- **Streamlined mobile invoicing:** WEX® FSM's live invoicing system gave technicians the full price book to offer multiple options and close sales faster.
- **Accelerated payment collection:** The unified platform enabled recurring monthly payments for agreements and allows for payments to be received in under 24 hours.
- **Advanced real-time data:** AI-integrated advanced reporting and Azuga GPS tracking integration provide real-time data for better scheduling and targeted marketing.

The Results



Tripled Average Sales

The embedded live invoicing system provided immediate billing capabilities, which allowed technicians to offer multiple customer options and tripled average ticket sales.



Accelerated Cash Flow

Implementing the payment system enabled recurring monthly payments and accelerated payment processing, resulting in steady, year-round cash flow with payments received in under 24 hours.



Faster Response Times

Integrations like Azuga GPS tracking increase Andersen's efficiency, allowing dispatchers to send technicians to the closest call and improving customer response times.

Don't let manual processes hold back your next phase of growth.

> Schedule a demo to get started today.

