



BUILDING VALUE THROUGH INNOVATION



Mechanical Electrical Plumbing



Mechanical Electrical  
Plumbing



Win



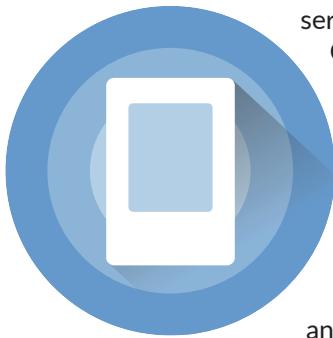
Build



Service

# MEP firms grow business profitability with COINS

A modern, web-based, unified, configurable system that enables specialty contracting firms to manage finance and operations with confidence. With our 30 years of experience in construction & service solutions, it's no surprise that 6 of the top 10 mechanical contractors in the US depend on COINS.



Mechanical, electrical, and plumbing contractors manage two contrasting business types: construction and service. COINS suits both. The COINS system boasts excellent capabilities for complex construction projects as well as outstanding functionality for higher-volume, lower cost service operations.

COINS was designed with the needs of operations, finance, and management in mind.

Analyze project costs and revenue, monitor productivity, and forecast cost to complete. Equip field technicians with mobile apps to capture data and delight customers. Grow the skills and knowledge of your team members.

## Single source of data

All COINS modules store data within a single unified database, so you can run reports and queries against the precise combinations of data your decision making requires. When change orders or cost variances occur, the new information is immediately reflected across the system. All the data you generate and collect from project inception through handover and maintenance resides in one system, furnishing a complete history of a job, customer, location, or piece of equipment.

Business Intelligence lets managers and analysts dig into data and slice it by project type, project manager, region, and more. Build dashboards with compelling interactive tools like charts and maps that empower managers to quickly absorb

performance measures and trends. With COINS you can efficiently and easily manage construction, service, and every other part of your business by comparing and contrasting information regardless of the nature of work.

## Automate routine processes

Workflows automate routine but essential processes, such as invoice and PO approval. The benefits: fewer errors, better policy compliance and auditability, and freeing team members to focus on higher-value activities. COINS' fully native workflow engine allows process automation throughout the application. Document Management lets users easily attach documents to transactions such as invoices, subcontracts, or HR forms.

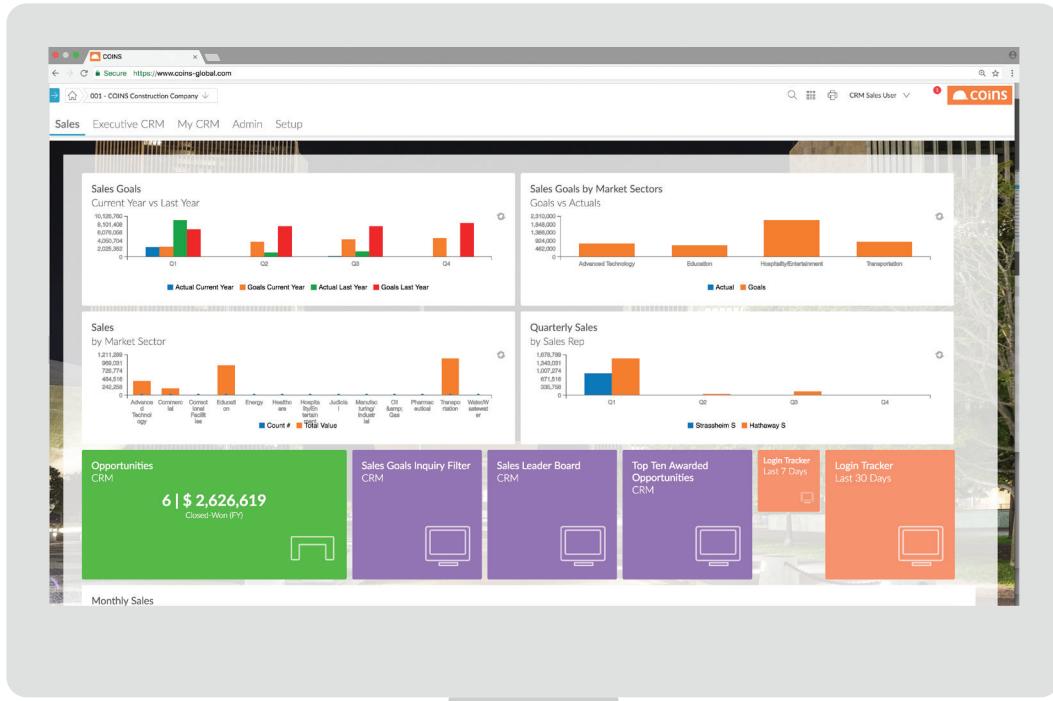
## A passion for excellence

COINS pairs software excellence with the highest quality implementation services, training, and support. We deliver projects using a consistent, structured approach within a clearly defined framework, focusing on your desired outcomes. COINS training helps you get the most from our solutions, quickly and efficiently. We accelerate the learning process for end users, increasing business productivity and creating a platform for continued success.



COINS is guided by the values of innovation, collaboration, risk mitigation, commercial awareness and a strong sense of social responsibility. We invest to constantly improve our software to meet our clients' current and future requirements. Our aim is to build a lasting relationship with each of our clients.

Sales managers stay on top of key metrics with CRM dashboards.



Win

COINS supports the growth of your business by helping you track opportunities, current and prospective clients, contacts, activities, and appointments. A single repository of client and opportunity activities promotes collaboration and consistency among sales team members.



## Growing your business requires Enterprise CRM

Before a specialty contracting firm can fabricate a piping or duct system, or dispatch a service tech, the firm must find clients and projects. New business development is crucial to success.

Client relationship management (CRM) lets you store and update information on the vast number of contacts across your clients and prospects. This information is available to client-facing team members in different functional areas, facilitating collaboration to grow relationships with potential and current clients. Spreadsheets and simple contact management systems are inadequate to the task, as they become unwieldy or break down under the strain of vast amounts of ever-changing data.

COINS offers enterprise CRM functionality optimized for construction and service. You'll stay on top of new business opportunities and coordinate team activities with COINS Client Relationship Management. COINS automates the tracking of plans, activities, and communications related to opportunities, clients, and prospects.

## Client opportunities, projects, contacts, and more

Quickly retrieve a wide range of information about project opportunities and subprojects. COINS CRM tracks information such as project team members, key dates, milestones, key project values, types of work, lead source, won/lost, competitor information, project issues, and risk assessment.

View information and history about active or prospective clients, such as previous projects and project opportunities, company structure, financial performance, and event attendance.

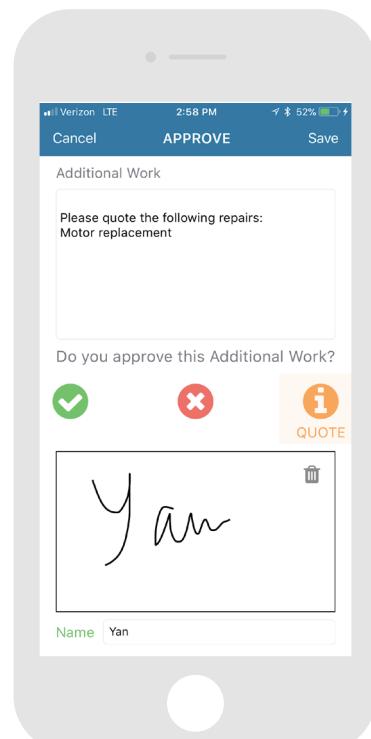
Before calling a contact, sales professionals can review contact details, including past employers, personal interests, social media pages, and relationships with other contacts.

Sales teams use the journaling functionality to log activities, appointments, and project opportunities on a day-to-day basis. Client-facing team members can add appointments or tasks, receive assignments, and assign activities. Easily click over to multiple action list views.

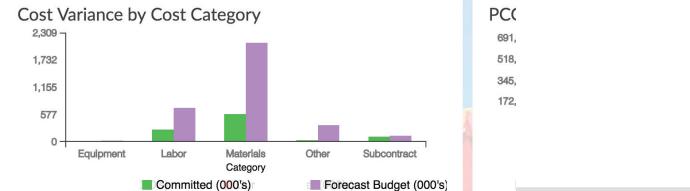
Identify which members of your team may be able to contribute to winning a project. Filter marketing and sales team members by skills, qualifications, experiences, and previous projects and contacts.

## Upselling

In addition to winning new projects and clients, MEP firms want to expand existing client relationships. On the service side of your business, field technicians often notice opportunities for additional work or a service agreement. With the COINS Mobile Technician app, they can quickly enter a sales opportunity. When the visit information is transferred to the back office, the dispatcher or service manager emails the lead to the sales team for follow up.



Technicians can propose additional work and have customer sign approval while on site.



Check project vital signs at a glance, including percent complete, cost variances, changes, open items.

**Cost Code Summary**

**Contract Labor-Regular**

**Key Metrics**

Contract Amount	3,453,222
% Complete	27.50%
Revenue to Date	949,733
Billing to Date	587,463
Under/OverBilled	362,270
Incurred Cost	907,531
Cost at Comp	3,299,779

**Open Items**

Type	Count
Meeting Items	1
Purch List	2
Issue Item Type	3
RFPs	1
Submitted	2
Tasks	1

**Key Metrics**

Metric	Value
Revenue to Date	949,733
Billing to Date	587,463
Under/OverBilled	362,270
Incurred Cost	907,531
Cost at Comp	3,299,779



## Build

MEP firms get a full-fledged business control center with COINS, empowering them to manage construction projects, automate common processes, analyze performance, and manage and develop people. Outfit your team with COINS to stay on top of critical metrics and trends.

### **Proactively manage project spend**

It's critical to know quickly if project costs are going over budget. If Finance uses one accounting system but project managers have separate tools, financial reports could lag behind in showing that a project is in trouble. With all stakeholders using COINS, all data entered is available in real time for users. For example, the Job Status Dashboard includes up-to-the-minute labor and material costs. If the project is

"Having everything accessible anywhere there is an internet connection allows us to access job costs, forecasts and budgets from any browser."

Erick Smithback - Project Manager, Hooper Corporation

50 percent complete but 60 percent of the budget has been consumed, you'll know right away.

COINS provides tools to make you and your team more productive by allowing you to easily analyze costs, generate billings, update forecasts, and handle change orders. Your project can start by using our tools to import data from an estimating system or spreadsheet to build a schedule of values. You can then view and maintain budgets, forecasts, and reforecasts and compare them against actual performance in real-time. Team members can dig deeper to see the details of commitments and actual costs.

### **Mobilize supervisors - any device, anytime, anywhere**

Construction supervisors have better things to do than perform cumbersome admin tasks while sitting at a desk. With COINS mobile tools, supervisors can handle administrative tasks as they move around the site performing their duties. They can create daily reports that contain hours for crews and equipment, quantities installed, materials used, and miscellaneous items such as reimbursable expenses.

Input flows from the field into the COINS system for payroll, equipment usage, and other charges to the job. Office personnel time is conserved as they don't have to re-enter data from paper forms.

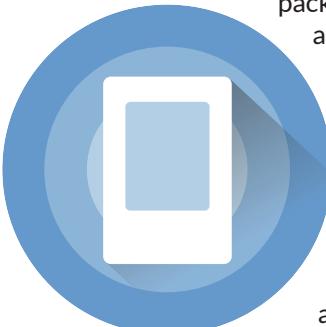
### **Give time back to project managers**

Project managers are responsible for everything concerning their projects, including planning, scheduling, and budget control. Whenever client modifications, late deliveries, bad weather or a multitude of other variables change the project, the project manager must refactor schedules and budgets and continually communicate with everyone involved with the project. All of this can easily consume entire work weeks.

COINS helps project managers solve this seemingly impossible time management dilemma. Automating the management of RFIs, submittals, transmittals, meeting minutes, and daily reports leverages PM time. Project communications and documents are easily retrieved. Reports make it simple to drill down into project detail and view data in different ways.

### **Avoid surprises from subcontractors and vendors**

External resources can greatly impact project costs, duration, and success. COINS includes tools to effectively manage subcontractors: creating subcontract packages, enforcing budget limits, and managing change orders.



Procurement functionality in COINS supports activities throughout the process: planning; defining procurement packages; selecting vendors; creating and issuing requisitions, bid appraisals, order approvals, and purchase orders; and reviewing performance. Invoices are matched against receipts and orders.

The image displays two screens of the COINS software. The left screen is a 'Schedule & Dispatch' board for COINS Construction Company. It features a map of Charlotte, NC, with various service locations marked. A 'Weekly Scheduling Board' table shows technician assignments for specific dates. The right screen is a mobile phone interface showing service statistics: 4 Outstanding tasks, 3 Pending tasks, 32 Issues, 0 Alerts, 10.8M Overdue AP Invoices, and 0 My Uncommitted Material Orders.

Schedule & Dispatch boards help get technicians to customer sites on time and with the right parts.



## Service

The COINS MEP solution enhances all facets of a contractor's service operations, including maintenance agreements, tasking, trouble calls, visit scheduling and completion, dispatching, billing, and payroll. The results: optimized productivity and improved customer satisfaction.

Specialty contractors often mix construction projects and service in their business, which can present a management challenge.

Construction projects are one-time, high-cost projects, whereas service is characterized by a high volume of short duration, low-cost engagements.

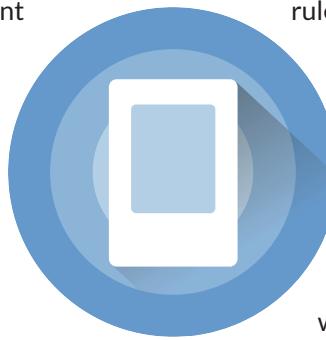
COINS doesn't try to force-fit your service operations into a construction model. COINS Service Management addresses all facets of a contractor's service operations, from maintenance agreements, trouble calls, visit scheduling and dispatching through to billing and payroll.

### Manage customers and service orders

COINS Service Management streamlines the way you manage and control service work, helps you improve the way you handle both preventive maintenance and trouble calls, and enables you to capitalize on your most profitable types of work.

Customer service agreements define your relationship with each customer. They are flexible, so you have the option to keep multiple business units and locations

under one organizational agreement, with different billing requirements and tax rules for each entity.



Service orders track the work being performed, which may have different operational and general ledger reporting requirements. You can track preventive maintenance, billable "extras," warranty work, spot work, and more.

Access detailed information about a customer's equipment, service history, preventive maintenance schedules, agreement performance, and profitability with a few clicks.

COINS handles preventive maintenance agreements with ease. PM schedules are automatically generated according to agreement terms – based on start date, end date, equipment, or periodic interval. For a specific equipment model, you can define standard tasking and parts. Track whether equipment is under warranty or covered by a service agreement. View equipment service history.

Track service profitability by agreement, customer, or department using reports and dashboards.

With COINS Mobile Technician, techs can review their schedules in a grid or map view and click into an item for complete information.

Visit ID	Date	Time	Status	Customer	Notes
1	04/19	12:00	OPEN	Anchor Bank	Walk in cooler is down 02:00
2	04/19	14:00	TRAVEL	Auntie Bea Confections	Testing Walk in cooler 02:00
3	04/19	16:00	HOLD	Anchor Bank	Walk in cooler is down 02:00
4	04/19	18:00	OPEN	Cham Tesing	11 st laurence way, Madison, WI, 53701 Test: Something is leaking 02:00
5	04/19	20:00	OPEN	Cham-Test2	12 st laurence way, Madison, WI, 53701 Something is leaking 02:00
6	04/19	22:00	OPEN	Anchor Bank	25 W Main Street, Madison, WI, 53701 Walk in cooler is down 02:00
7	04/20	00:00	OPEN	Auntie Bea Confections	9630 Monica Blvd, Madison, WI, 53701 Testing Walk in cooler 02:00
8	04/20	02:00	OPEN	Anchor Bank	25 W Main Street, Madison, WI, 53701 Walk in cooler is down 02:00

Grid    Map    Past    Current    Future    +

## Service techs arrive on time with the required parts

Service customers expect technicians to arrive on time, with the right skills and parts for the repair or scheduled maintenance tasks. Service providers want to optimize technician productivity at the job site, minimizing time spent in transit or running for parts.

When a call comes in, the dispatcher has access to all pertinent information, such as customer, location, contacts, skills required, warranty expiration date, location hazards, and service history.

With our easy-to-use scheduling board, dispatchers can quickly schedule and dispatch service visits in COINS by dragging the order onto a

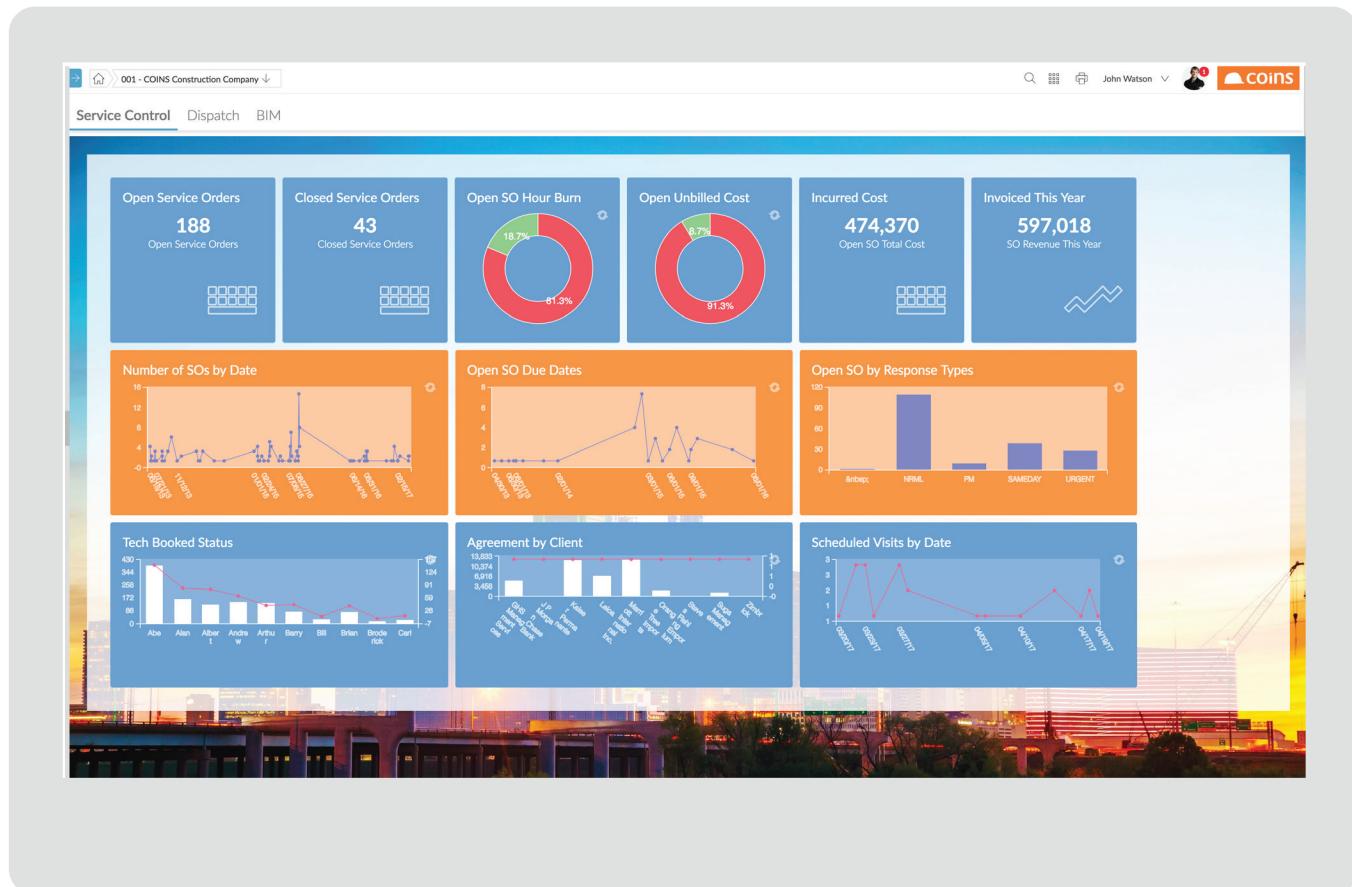
daily or weekly board. They see technicians' current status, location, availability, coverage zone, and priority. Preventive maintenance visits also appear on the board, color coded for quick visibility.

The scheduling and dispatch boards can also notify technicians of their assignments, automatically and directly upon dispatch.

"With Mobile Technician, users can review their schedule several days ahead, leave straight from the house for their first job in the morning, capture customer signatures, pull up inventory and equipment lists – without the need to carry books. All the information they need is right in front of them."

Andy Chrisinger - Service Dispatcher, Hooper Corporation

Service control dashboard shows key metrics such as work volume, frequency of same-day or urgent calls, and bookings by tech.



## Amplify field productivity

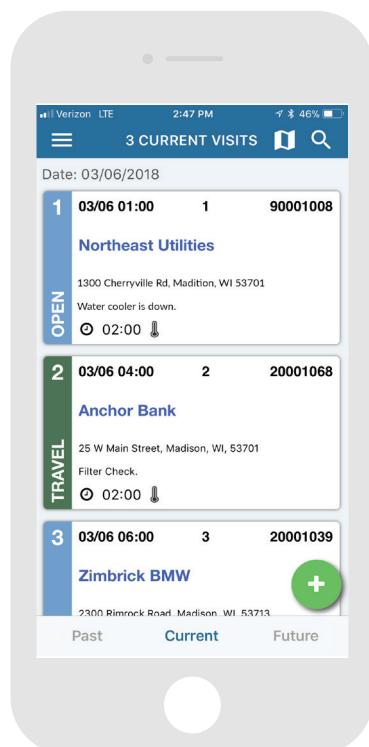
Tremendous opportunities for cost efficiencies and accuracy are available by equipping field service technicians with powerful mobile capabilities.



With COINS Mobile Technician, service techs see their daily schedule, and new calls assigned to them are automatically sent to them. They record labor, parts, photos, diagnostic readings, and other information as they work.

At the conclusion of the call, the tech reviews the service report on the mobile device with the customer, and the customer reviews the work and signs their approval. An electronic copy of the service report is emailed or faxed to the customer immediately.

No one needs to spend time re-keying data from handwritten service reports. Office personnel have service call data available immediately for billing review.



## Complete billing quickly and accurately

Prompt, accurate billing is vital to service cash flow and profitability. Completeness is important too, because customers don't like receiving multiple invoices for a service call.

COINS embedded "best practice" processes ensure service managers and supervisors review and approve visit details. Service order detail lines are automatically generated from visit details reported by the field tech. More accurate invoices, reports, and equipment and contract history are the result, with less work.

Automated accounts payable processing speeds up the posting of subcontractor and materials costs, so that they are available for billing. Billing personnel can easily pull up technician notes, photos, dispatcher comments, and associated documents.

## Control service purchasing and inventory

Service contractors have unique purchasing and inventory requirements. COINS Electronic Trading automates purchase orders and invoices, saving many hours of data entry and tracking.

COINS supports multiple warehouses and inventory locations, including technician vehicles. Material can be consumed from truck stock to a service call. Dispatchers can identify belts, filters, and other parts needed for a call and allocate them to the call, or parts can be allocated from a PO to a service call.

It's easy for field techs to see past, current, and future calls with COINS Mobile Technician.



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"We selected COINS as the best solution to tie in our service department with our operations, and the easiest interface for our non-techie users to understand and use."

Pamelyn Tolkoff - Chief Financial Officer, Pueblo Mechanical and Controls

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