

Company Profile



Fluid-Aire Dynamics is a family owned and operated company started in 1983. Over the past 30 years, Fluid-Aire Dynamics has built up a customer base ranging from the smallest shop to some of the world's largest corporations. They have provided customers with the finest compressed air products and services. Fluid-Aire Dynamics distributes equipment and accessories made by the most highly respected manufacturers in the industry.

Business Challenges

Fluid-Aire Dynamics has chosen FieldService360 as their cloud-based service management system. Prior to FieldService360, Fluid-Aire Dynamics was faced with daunting spreadsheets and complex database systems that failed to integrate seamlessly.

Strategic Partner Engagement

BiznusSoft was entrusted to enhance the way Fluid-Aire Dynamics manages the lifecycle of leads from prospecting, appointment scheduling, presentation, and transitioning into ongoing member management. Some of the key business objectives include:

- Replace Sage system with next generation CRM platform.

- Follow best practices for prospect management, customer management, inventory management, sales process, service process, agreements, and warranties.
- Integrate QuickBooks with FS360.

These requirements were the result of several interviews and detailed process reviews conducted with the Fluid-Aire Dynamics's Subject Matter Experts (SMEs) in IT, Marketing, Field Sales, and Corporate.

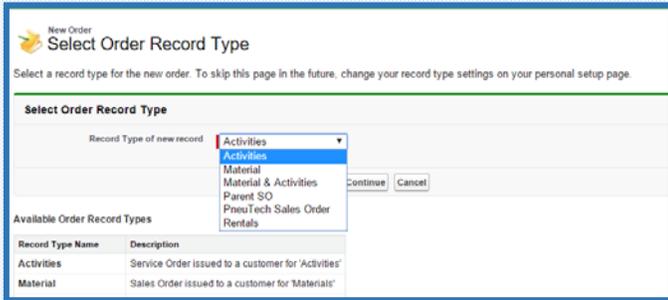
How Did the FS360 Solution Help Fluid-Aire Dynamics?



FieldService360 has offered a tailor made solution to Fluid Aire Dynamics (FAD) s' specific requirements to address the ever growing business challenges and enhance the service competency.

- FAD uses FS360 solutions' unique feature 360-Degree overview, which allows a user to access all the information of an account in a single window without going through tiresome steps.
- Accounts object was customized, according to FAD'S Business requirement to store different record types - Customer, Prospect & Vendor. It is offering an ease in managing different types of accounts.

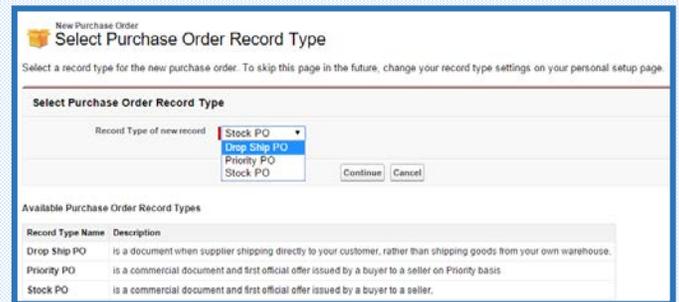
- FAD was going through difficulty in managing orders. Fs360 has understood the challenges and proposed the modified Order management module based on the type of service needed. The orders have been classified as Material, Activities, Material & Activities, and Sales Orders, This FS360 feature helped them to identify the order types effortlessly.



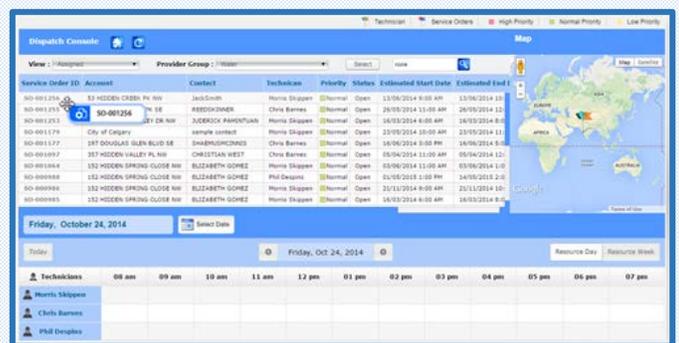
- Another cutting edge feature which has been brought up By Fs360 is to track the Order Status with unique icons visible at a glance. An order goes through various stages like Approval, Purchasing, Awaiting Shipment, Invoice and Closed. The Order detail page auto depicts the stage of the Order with symbols highlighting the present stage. Once the Order is approved, it checks for the ordered material automatically and inventory is reserved. If the required material or quantity is not available, a purchase order is auto generated with the specific vendor(s).

- FAD has witnessed great efficiency in managing PURCHASE ORDERS Module Post Fs360 implementation. FAD business needs have been customized accordingly in this module with a purpose to simplify worrisome areas identified through BPR Sessions.

- Purchase Orders placed with vendors are also differentiated as three types :
 - Stock Purchase Order- a normal order placed with your vendor for receiving material into the warehouse.
 - The Priority purchase order is created if there is an urgent requirement for material, or these are high priority orders that need to be fulfilled immediately.
 - Drop Ship Purchase Order is created in case the customer location is near the vendor location. Here the vendor directly ships the material to the customer; it helps in saving time & shipping charges.



- Dispatch Console has been a breakthrough feature of Fs360 which made FADS' dispatcher role efficient to schedule orders based on priority, technician availability and technicians work load.



- Order Checklist- This is a report generated by the Technician giving details of all service performed & the present status of the Compressor or Dryer, which he has serviced.

- FS360 Agreements feature helps FAD team to create yearly agreements for sold products, number of service visits required in a year, when the next date of service needed. Service order is auto created based on the total visits & visit frequency which saves a lot of time & efforts thus improving customer service.

Actions	Agreement Line Name	Installed Product	Items	Make	Model	Serial No.	Equipment Description	Frequency (in # of Months)	Customer's Frequency
Edit	3	FS3673	DRY	Kaeson	DRB	143	Air Compressor, Kaeson, 18hp, Fixed Speed, Rotary Screen	3	
Edit	2	FS3688	DRY	Kaeson	DRB	148	Air Compressor, Kaeson, 18hp, Fixed Speed, Rotary Screen	3	
Edit	3	FS3738	FRIG/DRI	Phosab	86-68	66-13-15750P	Pro-Tech Air Drier, Refrigerated, 45 CFM/Frac, 115v, Non-Cycling Type	3	
Edit	4	FS3783	FRIG	Kaeson	TAN1	1136	Refrigerated Air Drier, Integrated Kaeson	3	

Actions	Service Date and Total Cost	Visit Number	Date	PM Type	Hours To Complete	Cost Each Visit	Created By	Created Date
Edit	FS3673	1	9/24/2015	Basic	4.00	\$376.24	Ed Deane	9/22/2015 10:15 AM
Edit	FS3673	2	10/24/2015	Full	6.00	\$1,486.80	Ed Deane	9/22/2015 10:15 AM
Edit	FS3673	3	9/24/2016	Basic	4.00	\$376.24	Ed Deane	9/22/2015 10:15 AM
Edit	FS3673	4	8/24/2016	Sees	4.50	\$818.52	Ed Deane	9/22/2015 10:15 AM
Edit	FS3673	5	9/24/2016	Basic	4.00	\$376.24	Ed Deane	9/22/2015 10:15 AM
Edit	FS3673	6	10/24/2016	Full	6.00	\$1,486.80	Ed Deane	9/22/2015 10:15 AM
Edit	FS3673	7	9/24/2017	Basic	4.00	\$376.24	Ed Deane	9/22/2015 10:15 AM
Edit	FS3673	8	8/24/2017	Sees	4.50	\$818.52	Ed Deane	9/22/2015 10:15 AM

Actions	Service Order #	Account	Contact	Status	Order Total	Created By	Created Date
Edit	SO43248	Parent SO	Valuations of GrandFAB	Open		Ed Deane	9/22/2015 1:27 AM
Edit	SO43249	Master at Activities	Valuations of GrandFAB	Closed		Ed Deane	9/22/2015 1:27 AM
Edit	SO43251	Master at Activities	Valuations of GrandFAB	Closed		Ed Deane	9/22/2015 1:27 AM
Edit	SO43252	Activities	Valuations of GrandFAB	Closed		Ed Deane	9/22/2015 1:27 AM
Edit	SO43253	Activities	Valuations of GrandFAB	Closed		Ed Deane	9/22/2015 1:27 AM

- FS360'S has modified Reports and Dashboards so elegantly that it enables FAD management team to view reports. Graphical representation offers a very lucid snapshot which helps them to view employee's or company's performance, profits, customers, etc.

Feedback from Brad Taylor, Systems Engineer, Fluid-Aire Dynamics:



“We recently rolled out FS360 and decommissioned our legacy CRM and SCM systems. To say the least, we had a great experience in rolling out FS360 in Phase I and are looking at working with the BiznusSoft team closely in rolling out their HR and Finance Management solutions.

Their team worked diligently with our team to understand our business processes and define the future business processes to increase productivity and transparency for our management team.

We evaluated multiple Field Service providers during our sales cycle but went with BiznusSoft for its edge as a single solution provider for all core business solutions. We are glad we made the right decision and are looking forward for working with their team on other phases. We strongly recommend BiznusSoft and their solutions.”