

Company Profile



As an established Canadian company, The Door Company of Ottawa, Belleville and the Durham region has been in business for 35 years, providing quality workmanship and service to their valued clientele.

They are the region's best supplier of garage doors with large inventory and high volume. The Door Company's team has a combined 250+ years of residential and commercial garage door experience.

Business Challenges



The Door Company was seeking a Customer Relationship Management (CRM) tool to help improve closing rates, prioritization, and efficiency in relation to managing quotes & sales orders. They operate two physical offices, receiving 5-10 leads per day and typically quote an additional 5-10 opportunities per day. Approximately 50% of business is based on annual contracts with recurring orders being received on a weekly basis.

Each salesperson is responsible for managing anywhere from 10-50 recurring accounts and 50-100 prospects. The Door Company team realized that their existing business process was lacking CRM & ERP functionality. Their sales team was losing leads or not following-up with leads in a timely manner. At the same time, Quote & Work Order management was a manual process and paperwork was getting lost.

Strategic Engagement



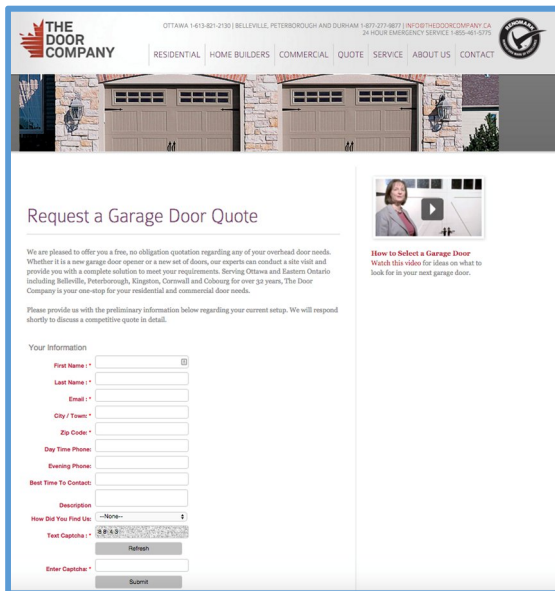
In order to ensure the success of the FieldService360 project while managing inherent project challenges, BiznusSoft initiated their practice-proven solution implementation and project management methodologies. This approach introduces a controlled process that ensures enhanced collaboration, improved user adoption, and reduced project risk. As a result, The Door Company was able to systematically and tactically address their functional and technological requirements without disrupting business operations. The BiznusSoft comprehensive service offerings allows for superior change management across all dimensions of the organization inclusive of people, process, and technology.

FieldService360 Solution Benefits for The Door Company



✓ 360-Degree Account View

The FieldService360 solution provided a holistic account overview, which included contacts, quotes, work orders, installed products, contracts, warranties, and specific account-related documents. In addition, leads from the TDC website were converted into prospect accounts using an integrated web form. The sales person was easily able to work their leads as the system auto-assigned a sales person to the account using business rules.



✓ Trade Show Lead Management

The Door Company Team participates in various trade show events throughout the year in order to generate a high volume of leads and to continue to expand its strong market presence. In the past, the team had struggled with effectively capturing/managing leads in this environment.



The FieldService360 solution effectively addressed this core requirement by providing users with the ability to easily capture lead information from their mobile devices.

✓ Quote & Sales Order Management

The FieldService360 solution offered the ability to efficiently create quotations and generate sales orders. After a quote is created, a PDF is generated and sent by email to the Customer for approval. Once the quote is approved, a work order can be created by a push of a button, which transfers the details from the quote to the work order. In addition, existing quotes can be cloned to save time in processing the quote.

| THE DOOR COMPANY | | Quotation | | |
|---------------------------------|---|---------------------------------------|---------------------|--------|
| Date: Jan 13, 2016 | | Quotation# SQM12-07-2015-33489 | | |
| Quotation valid until: 2/7/2016 | | Prepared by: The Door & Floor Company | | |
| Quote To: | | Job / Location: | | |
| Customer Name: test234 | | Reference: | | |
| Phone: | | Address: | | |
| Work Phone: | | City: | | |
| Mobile: | | Postal Code: | | |
| Email: moim@biznussoft.com | | Directions: | | |
| | | Customer PO: | | |
| Part ID | Description | Qty | Unit Price | Amount |
| | Complete with new hardware, tracks, 12" radius, springs, cables, and all HW | 1.00 | 20.00 | 20.00 |
| WS7001 | Weatherstrip 7001 | 1.00 | 30.00 | 30.00 |
| Removal | Includes removal and disposal of existing garage door | 1.00 | 40.00 | 40.00 |
| | | | Subtotal | 90.00 |
| | | | HST | 11.70 |
| | | | Total | 101.70 |
| | | | Required Deposit | 25.43 |
| | | | Due Upon Completion | 76.27 |

Please make all payments to: The Door Company
COD: Due Upon Receipt, Cash, Cheque, Debit or Credit customers must pay balance owing upon completion of job.
2% monthly interest on all past due accounts.
All goods and services remains the property of The Door Company until paid in full.
HST #R10526409 / TVQ #121934730

✓ Pricing Management

At the request of The Door Company, the FieldService360 team crafted customized pricing functionality. In this environment, the Commercial Price Book is automatically updated when an item is created unless the fixed price checkbox is flagged. The special price of the item is also auto calculated based on the cost price defined at the item level.

✓ Scheduling/Dispatch Management

The FieldService360 Dispatch Console provides The Door Company with the drag/drop capability to assign work orders to technicians by viewing their calendars/schedules. This capability assists with managing a balanced workload across the workforce while taking in to account specific geographies, skill sets, etc.

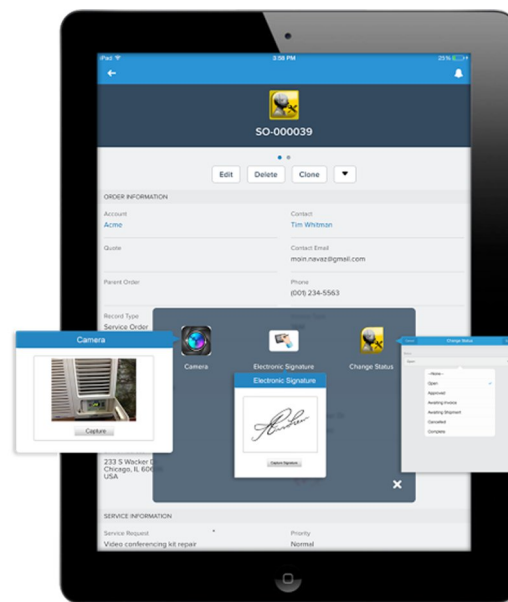


✓ Dashboards/Reporting

The robust FieldService360 Reports/Dashboard capabilities ensures each team member has their own access/visibility in relation to vital company performance data via real-time analytics.



✓ FieldService360 Mobile Solution



- View/Update Service Order Information as required.
- Enter Time, Material & any additional expenses incurred while at the customer site.
- Take Equipment pictures of the site & upload to the service order.
- Capture digital signatures from the customer confirming that service has been provided.

Feedback from Greg Bell, CEO/President, The Door Company

“The BiznusSoft/FieldService360 team was great to work with. They worked diligently to understand our business model and were committed to roll out the project successfully. Using FieldService360, we have gained efficiency in sales and operations and I highly recommend the solution for any service organization.”