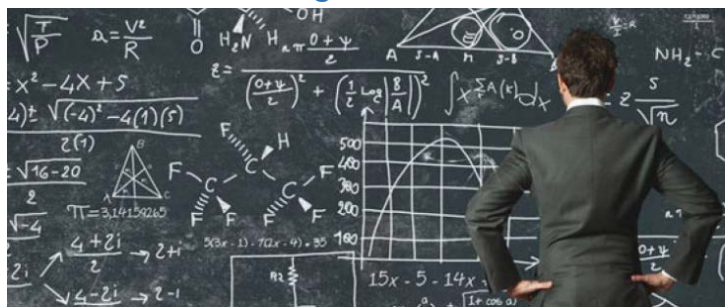


## Company Profile



Overhead Door is one of the most recognized and respected brands in the garage door industry. C. G. Johnson, invented the upward-lifting garage door in 1921 and the electric garage door opener in 1926. For over 90 years, the Overhead Door brand has stood for product quality and expertise, as well as professional service. From commercial and industrial overhead doors and access systems to residential garage doors and openers, Overhead Door combines quality, dependable products with reliable service to consistently give home and business owners confidence and peace of mind. Overhead Door Company of Utah Valley has four business units – Installation, Manufacturing and Wholesale. Seventy percent of business is driven by builders/contractors.

## Business Challenges



Inventory management entailed utilizing components in combinations as kits and posed challenge as components were purchased from multiple sources. There was neither a standard quote layout nor a checklist for service calls. There was no categorization of technicians per skillsets.

Wholesale pickups were not included in the dispatch calendar. In addition, there was no way of tracking technicians or order status based on tech transactions. Invoice in FS360 needed to be integrated with QB. Technicians used Google for scheduling but there was no service or customer visibility. There was a need of decreasing other inefficiencies to accomplish faster growth and service customers better. A quick-to-implement cloud based field service solution was what was needed.

## Strategic Engagement

A seamless solution that tracked work orders and technicians was the next obvious step. BiznusSoft started this engagement with a commitment to deliver value fast to aid growth. BiznusSoft initiated the engagement with its SMART project management approach. This approach introduced a controlled process for outcomes that were more Specific, Measurable, Achievable, Realistic and Timely.



As a quick win, Overhead Door of Utah Valley implemented WorkOrder Management and scheduling modules of FieldService 360. In addition, the BiznusSoft team built custom reporting on salesforce to help the team with important decision making with metrics. The BiznusSoft team also worked closely with the Overhead Door of Utah to come up with Service Packages and door installation kits, to better manage service and inventory.



## FieldService360 Solution Benefits for Overhead Door Company



### ✓ **Centralized Data Management**

The 360-degree page provides a holistic view of Account, Contacts, Quotes, Work Orders, Installed Product, Sites and specific Account related documents.

### ✓ **Quotes, Work Order and Asset Management**

FieldService360 solution provided Overhead Door Company the capability to easily manage quotes, work orders and assets for customers/prospects.

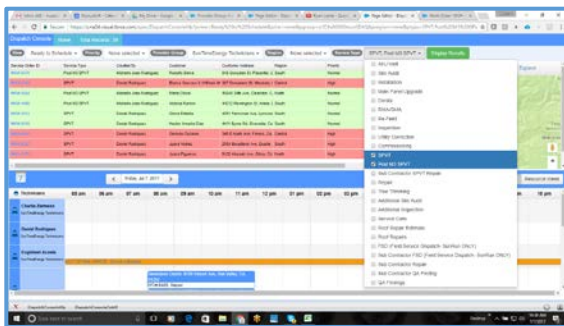
### ✓ **Customer Invoicing Integration with QuickBooks-**

Overhead Door utilizes an integration of QuickBooks with Field Service 360 for billing, along with the labor and material details within the invoice of the service order.



### ✓ **Scheduling/Dispatch Management**

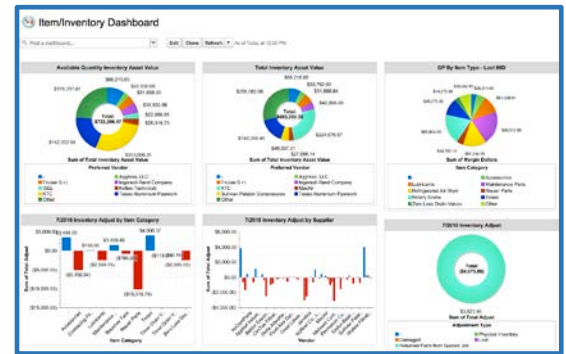
FieldService360 Dispatch Console provides Overhead Door Company with drag/drop capabilities to assign work orders to technicians by viewing their availability on the calendar. This capability assists with managing a balanced workload across the workforce in specific geographies, skill sets, among others. The Dispatch console also enabled dynamically changing work assignments.



### ✓ **Inventory Management**

By utilizing the FieldService360 inventory module, Overhead Door Company can facilitate their entire inventory management process efficiently; from procurement to fulfillment. It can maintain all parts, equipment, services, etc. on a single view. Overhead Door Company can setup product kits as bundles of parts; and multiple inventory sites which store Serial Controlled, Lot Controlled and Non-Controlled items with the specified quantity.

### ✓ **Dashboards/Reporting-** FieldService360 Reporting and Dashboard capabilities ensure each team member has access to organize wide data analytics as well as individual performance indicator metrics to better plan their work.



### ✓ **FieldService360 Mobile Solution**



- View/Update Work Order Information as required.
- 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 Cory Holley, **Overhead Door Company of Utah Valley**

“Robust FieldService Solution. BiznusSoft team did a great job getting us up and running on the FieldService package. Their understanding of our pain points and requirements were key for a successful implementation. We are now in a position to scale and manage our business better.”