BiznusSoft
SaaS solution provider

Company Profile

Founded in 2011, Overhead Garage Door LLC is a rapidly-growing garage door repair and installation company headquartered in Fort Worth, Texas. They serve both commercial and residential markets. As a family-owned and operated business, they put customer service above all. This belief has allowed them to expand into new markets and new places year after year.They service and repair all makes and models and stock a large selection of parts in their own store.

Business Challenges and Needs

Overhead Garage Door was using Corrigo's Field Service Management Software for managing field service operations and Quick Books for the finances. Those software could not manage a changing business process. As a result, Overhead Garage Door wanted something that can easily be customized and scaled. As field technicians, and salesmen got paid commissions it was imperative that the system allowed for easy cash-out calculations. Due to the vast number of combinations possible, an easy CPQ tooling was also important for salesmen. Invoicing and document management also needed to be inserted into the workflow so that they can have access to relevant images (guides, photographs). There was a need of handling separate workflows for Residential, Commercial and New equipments.

No categorization of technicians per skillsets or geographical areas made the scheduling difficult. In addition, there was no way of tracking technicians or order status. Invoice in FS360 needed to be integrated with finance application to easily gauge profitability. 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.

StrategicEngagement – CPQ, Workflows and Profitability

A seamless solution that tracked work orders, technicians and profitability 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.
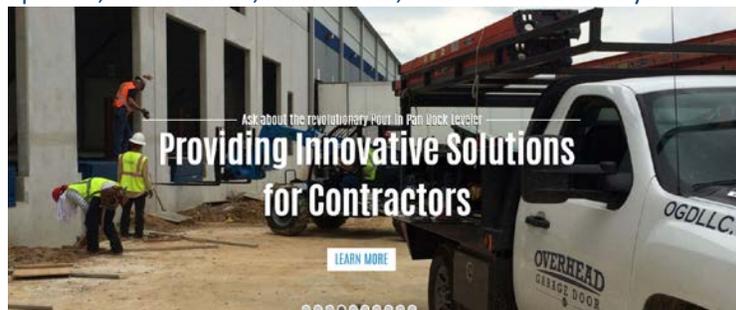
As a quick win, Overhead Garage Door implemented WorkOrder Management and scheduling modules of FieldService 360. In addition, the BiznusSoft team built custom reporting on salesforce to help the team with profitability and job costing metrics.The BiznusSoft team also designed a Configure-Price-Quote (Door builder) tool to help salesmen dynamically quote with a link to item costs, to better manage customer experience and inventory.

FieldService360 Solution Benefits for
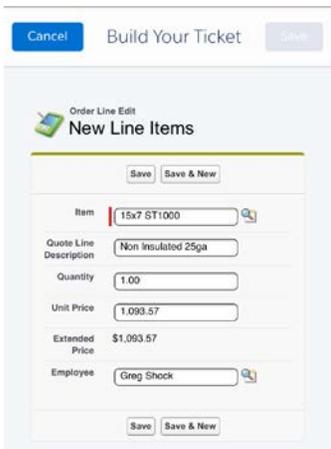## Overhead Garage Door

✓ **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.

✓ **Configure-Price-Quote (CPQ), and Work Order Management**
FieldService360 solution provided Overhead Garage Door the capability to easily buildquotes andwork orders for customers/prospects.


✓ **Customer Invoicing**–Overhead Garage Door utilizes an integration of Finance 360 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 Garage Door 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 enables dynamically changing work assignments and manage ad-hoc as well as planned events.
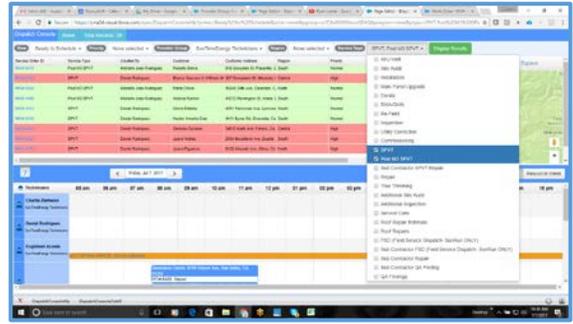
✓ **Dashboards/Reporting**- FieldService360 Reporting and Dashboard capabilities ensure each team member has access to organize wide data analytics as well as individual performance indicator metrics to better plan their work. Reporting also helped in generating ad-hoc and weekly profitability reports as well as restocking Purchase Orders for the technician trucks.
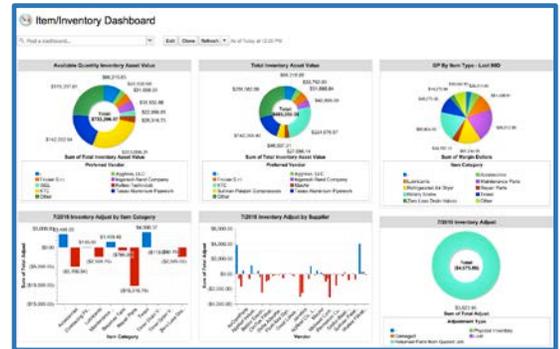
✓ **FieldService360 Mobile Solution**

• View/Update Work Order Information as required.
• Take Equipment pictures of the site & upload to the work order.
• Quote, Invoice and receive payment from the mobile
• Capture digital signatures from the customer confirming that service has been provided.

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Finance 360 Solution Benefits for
Overhead Garage Door

Overhead garage Door also wanted to use Finance 360 solution to integrate finance with field service, and get away from Quick Books. As Overhead Garage Door was growing rapidly, QuickBooks was not able to meet their requirements and they were looking for a scalable finance platform that was well integrated with their processes and workflows.

✓ *Finance & Accounting functionalities*

Finance 360 solution streamlined Overhead Garage Door's most critical financial operations and increased the efficiency of close cycles.
- Accounts Payable
- Accounts Receivable
- Cash Management
- Fixed Assets
- Financial Reporting
- General Ledger
- Tax Management
- Payment Management
- Usage-based, product, subscription billing
- End-to-End audit trail

✓ *Billing*

Now Overhead Garage Door can manage all revenue and billing procedures from a centralized location thus allowing them to establish pricing structures and automate billing processes with an integrated billing framework.

✓ *Integration*

Overhead Garage Door could seamlessly integrate with other data systems and applications for long-term budgeting and forecasting as well as for field service operations.

✓ *Revenue Recognition*

Overhead Garage Door could accurately present revenues on financial reports in compliance with accounting standards. Due to end-to-end integration, they could ensure accuracy of quotes, customer order fulfillment, and efficient billing. It was also able to:
- Manage recurring and non-recurring invoices
- Adjust pricing of product with greater flexibility
- Increase its visibility of available inventory

✓ *Financial Reporting*

One of the key things accomplished for Overhead Garage Door was its enhanced visibility into its business performance with real-time analytic reports and efficient access to vital KPIs.

• Overhead Garage Doors could tailor reports specific to its needs

• Multi-dimensional reporting and global compliance were also embedded in the system

• Overhead Garage Doorcould usereal-time insight and 360-degree view dashboards to keep a tab on profitability.