



DIGITAL TRANSFORMATION USE CASE

IFS FSM / MOBILE & FORMSPRO



IFS
AUTHORIZED
CHANNEL
PARTNER

FormsPro
POWERED BY OMNIBYTE

Focusing On Your Building So You Can Focus On Your Business.

1962

BRADY SERVICES
WAS FOUNDED

EMPLOY OVER

430

ASSOCIATES



As a software company, our job is to stay on top of changes in the industry that will help us solve our clients' problems. Brady Services is a family-owned organization founded in 1962 in Greensboro, North Carolina. They employ over 430 associates and stay true to their mission which is to focus on your building so you can focus on your business.

As an IFS customer, Brady needed a simple, portable and scalable forms solution that would integrate seamlessly with the IFS FSM and FSM Mobile technology that they have deployed. FormsPro was the best solution to help them meet their requirements. This use case shows you the power of connecting FormsPro with IFS, whether that be their cloud solution, apps 10, or in this case, the IFS FSM product.



Increased Business Value / Impact:

- **EPA Section 608 Compliance and Automation**
 - **Refrigerant Form:** Leak Rate – Customers are required under the EPA section 608 to calculate the leak rate every time refrigerant is added to an appliance.

Data from the Refrigerant Form is automatically fed into the EPA database in IFS vs. manually entering.
- **Technician Safety:** Sending real time feedback on site safety issues concerns to ensure our technicians are working safely.
- **Customer Satisfaction & Automation:** Brady customers are getting equipment-form logs and reports in real-time for contracted maintenance to improve customer experiences.
- **Technician Efficiency:** Streamlining the process to attach and send forms saves our technicians time on paperwork.

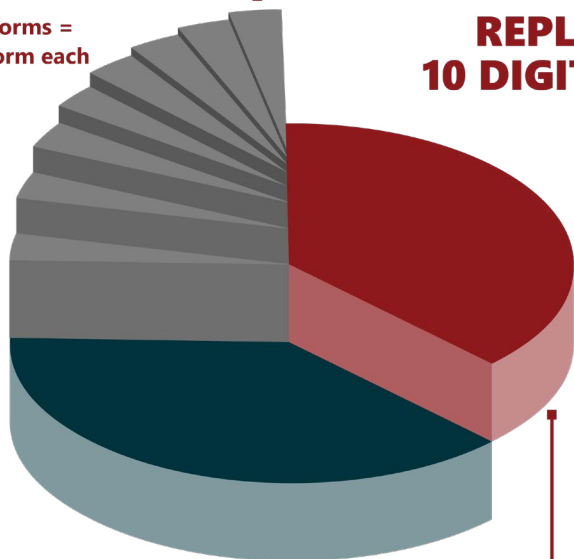
Project Summary

Forms Digital Transformation

8 Digital Forms

8 digital forms =
1 paper form each

32 PAPER FORMS
REPLACED BY
10 DIGITAL FORMS



2 Multi Forms

24 paper forms replaced by 2 digital forms

- ICON Boilers = 17 paper forms
- HVAC Log = 7 paper forms

* Using FormsPro conditional logic and other features, forms adapt and transform to a particular form based on input by the tech



Project Summary

Integration with FSM Mobile

- Launch specific forms from a task in FSM
- In some cases, launch form based on type of product on the task
- Prepopulate form with customer, task, and product info

FSM Integrations on Form

- On all equipment-focused forms, techs can use the product on the task OR use FormsPro filtered lookups to select a different product at the task place.
- FormsPro gives techs the option to email form PDF to list of contacts populated from FSM.
- Techs can also use FormsPro independently. Task lookups populate with tasks the tech is assigned to or listed as a resource on the task. Product lookups populate with products at the task's place.

FSM Integrations on Submit

- Upload PDF reports and site images to FSM back office and attach to the task. All of this happens automatically.
- Insert chiller log form data into custom FSM table, which Brady uses to generate reports in FSM

SSO with Azure AD

Dev and Production Environments

OmniByte builds forms for Brady upon request. Brady tests and deploys their forms to production without further assistance.

Bottom Line

The ability to integrate with IFS Field Service Management and FSM Mobile is a powerful solution that can improve efficiency. With the right tools, your company can get real-time data and respond to issues in a timely manner. We know that the right integrations lead to better results. It's important to choose a product you can trust, like FormsPro, that can help you make these integrations possible—saving your organization valuable time, resources and ultimately dollars.

For more information on how FormsPro can drive digital transformation in your organization, reach out to our sales team, or better yet, use the button below to start your own 14-day free trial.



**START YOUR
14-DAY FREE TRIAL TODAY**