



## A CASE STUDY FOR FIELD SERVICE MANAGEMENT—ISA FIRE AND SECURITY



### The Company

Based in Louisville (Kentucky), ISA Fire and Security provides unique expertise in fire, sprinkler, security, and mass notification systems. The company ensures safe and secure environments for its customers. ISA takes care of the design, installation, monitoring, service, and maintenance of fire and security systems with expert teams who understand code and insurance requirements.

### The Task

ISA had an efficient manual process that worked very well in the past, but with the company's growth, administration costs had started going up. Tracking all the service calls they needed to complete was becoming challenging. It was critical to be able to automate the entire service management cycle while managing inspection contracts and adhering to industry codes. The ISA team needed a comprehensive field service solution to help deliver superior customer experience while lightening the administrative load that was becoming a burden on the team's technicians. With hundreds of fire safety systems to maintain, ISA wanted a system that would empower their technicians to handle all work order aspects in the field. They needed an integrated application for customized billing schedules, maintaining installed products, keeping inventory and parts details up to date, and ensuring the process was completely automated and integrated to their financial system.

#### Headquarters

*Louisville, Kentucky*

#### Industry

*Fire & Life Safety*

#### Financial System in Use

*Microsoft Dynamics GP*

#### Fieldpoint Users

60

#### Fieldpoint Applications

*Work Orders, Inspection Agreements, Resource Scheduling, and GP Integration for Inventory and Billing*

## Business Process Requirements

- Manage complex installations across several customer locations
- Track and schedule test and inspection service calls
- Dispatch emergency and correction action service calls
- Meet all code requirements for alarms and sprinkler systems and schedule corrective action follow ups
- Cater to various customer recurring billing cycles that are associated with inspection contracts

## The Challenges

Fire and life safety is a highly regulated and competitive industry. Servicing companies strive to increase the number of systems they can design, install, and support while maintaining superior customer service. ISA has an extensive and growing customer base. They provide multiple services that require various inspection forms to be completed for each customer fire, sprinkler, or other safety system. That creates a lot of paperwork and they have to make sure service calls are consistently created and never misplaced. Over and above all the different services being offered, customer billing option choices were also varied and could be billed annually, semi-annually or quarterly.

ISA also offers different payment terms with clients. For some customers, they need to shift to pay on performance billing versus prepaid monthly for example. These clients need to be sent notifications that the inspections are complete and then the invoice is sent along with a copy of the inspection report.

To accommodate this growth, ISA started looking at different options for new service management software. They were using Microsoft GP for their accounting, so they ideally wanted an application that could integrate with Microsoft GP to streamline their entire service process.

*“Fieldpoint’s advanced tracking of inspections and service calls has enabled us to monitor deficiencies and ensured follow-ups, while significantly increasing our revenues.” – Jeff from ISA*

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# RESULTS OF THE FIELDPOINT IMPLEMENTATION

## Automation — The Service Management Process

The implementation of Fieldpoint for ISA has completely automated their entire service management process. They are now using Fieldpoint software to manage their emergency service calls, corrective action calls, and scheduled inspection work. Each work order type is automatically dispatched or ISA can use Fieldpoint’s resource scheduling tools to assign and dispatch calls to field techs. All work orders from start to finish can now be tracked and escalated if necessary to make sure nothing is missed.

The Fieldpoint contract application allows ISA to create custom inspection and maintenance schedules that generate work orders automatically on specific dates. The work orders now contain all the information required, including the appropriate forms to be filled out while onsite. Based on specific requirements, the technician can also append images of equipment, attach closing notes, and document corrective actions so they can be followed up when necessary. Closing work orders used to be a very manual process. Now, they can focus on delivering excellent service with the reassurance that technicians can easily access entitlements of work orders associated with contracts and see the correct amounts that need to be billed. They have reduced the amount of paper used, and there are no more misplaced service tickets or forms.

*“Fieldpoint has helped us automate and streamline our paper-based processes, creating greater visibility for both our technicians and customers and eliminating the risk of lost paperwork and missed service calls.” – Jeff from ISA*



### **Incorporating Flexible Billing Schedules**

Based on the inspection service types, frequency, and equipment on contracts, ISA's clients have different billing requirements. With Fieldpoint, ISA can now easily customize customer billing plans so invoices are automatically generated monthly, semi-annually, or at any defined time. That includes prepaid invoices or paid on performance invoices. Flexible and automated billing has accounted for accurate, faster customer billing that is never missed or delayed, driving increased cash flow.

### **Streamlined Financial Integration**

Fieldpoint has an out-of-the-box integration to Microsoft GP, and there is a seamless transfer of information between both systems. Everyone within Fieldpoint now has increased visibility into parts inventory. ISA's list of services also includes part sales, so the clear view into the in-house inventory is critical to them. If ISA consumes a part on a work order, GP inventory is immediately updated. If a part needed is not in stock, ISA uses Fieldpoint's integrated requisition and purchasing functionality to get the part ordered fast and efficiently. ISA uses Fieldpoint integrated customer billing to make sure GP sales and financial are updated immediately. They have achieved considerable times savings as they no longer have to enter the same data in multiple systems.

*"The Fieldpoint platform has helped significantly increase our efficiency in operation's scheduling, billing, inventory management, and follow-up service management." – Jeff from ISA*