

“The key to our success in using Ultimate Forms is collaboration. Our team must communicate clearly to ensure customers get the best possible service. Customer order information is updated using easy to understand forms. Service status is tracked with interactive dashboards.”

BILL FOSTER

Director of Operations

## How Lewis Systems collaborates and supports customers with Infowise Ultimate Forms in SharePoint

**Challenge:** Lewis Systems wanted a centralized work order system to facilitate real-time updates for on-site customer work using SharePoint and Microsoft 365.

**Solution:** Lewis Systems implemented Infowise Ultimate Forms as a Work Order Tracking System used in the office and on site with customers.

**Impact:** Lewis Systems employees can communicate freely and understand exactly what is needed next to best help their customers. A centralized dashboard shows real time information accessible to workers in the office and out in the field.

**Lewis Systems Core Value: Provide friendly and reliable customer care that shows our customers that we are ready to go the extra mile.**

For more than 40 years, Lewis Systems has provided the highest quality air compressor and vacuum pump system products, parts and service in the southeast.

Lewis Systems is committed to maintaining the best possible relationship with each of its customers. To provide excellent customer service, it is essential to have a well-designed system to coordinate and provide critical updates.

Implementing Infowise Ultimate Forms has allowed Lewis Systems to build a complete solution including customized dashboards, easy-to-use forms and automated email notifications to keep

our team and the customer always updated. Customers can receive a PDF report summarizing work immediately at any time.

Previously the business relied on shared network files and emails to try to coordinate support. Communication challenges resulted in delayed response and lost productivity. Lewis Systems was not able to achieve the level of support that was desired.

Today, using Microsoft 365 combined with Infowise Ultimate Forms, all team members can stay up to date. Technicians can make updates using mobile devices while out in the field. At the same time office workers can support and handle reporting from back in the office. Customers receive timely communication and updates in real time as work is being planned and executed.

“The key to our longevity is the excellent support we provide to our customers. We want our customers to know that we can help them keep their equipment in excellent condition and be responsive when challenges occur. Having reliable and easy-to-use software for order management allows us to meet our goals.”

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