



# Automated Business Processes Catalog

FacilityForce is pleased to offer a variety of Automated Business Processes (ABPs) solutions designed to eliminate manual steps, provide for more consistent processing, and ensure smoother running operation of your systems.

Choose from one or more of the following ABPs, which come complete with documentation as licensed software products that include support services.

Automated Business Processes are a class of Business Automation solutions that are individually licensed as FacilityForce products. ABPs provide no-code, configurable automation solutions and are grouped into 3 categories for value pricing.



## ABPS - THREE CATEGORIES:

### TARGETED:

**These ABPs are specific to an automation scenario and while they are configurable they typically will only have one configuration option.**

### MULTIPLIER:

**These ABPs support a specific scenario but because they are configurable they can have more than one configuration meaning that the same ABP can be set up more than once to handle multiple use cases. For example the Close Work Orders ABP can be set up more than once to close work orders of different types at different intervals.**

### GLOBAL MULTIPLIER:

**These ABPs are the most dynamic and versatile because they can be used on almost any table getting the highest value by using the same ABP in many configurations. For example, the Field Level Security ABP works on any table so the customer can use this for as many tables as they want. There is only one instance of the script managed in the doc repo but many configurations in the Business Automation screen**



## ABP CATEGORY: TARGETED

### APPROVE CUSTOMER REQUEST

**CATEGORY:** Targeted

**SUMMARY:**

*Specific to Inspections, create actionable Work Orders as part of Remedial Action when an Inspection step fails.*

**DESCRIPTION:**

Specific to inspections, this ABP can automatically create actionable work orders as part of remedial action when an inspection step fails. This eliminates the need to manually create work orders from customer requests.

### PHASE STATUS ASSIGNED

**CATEGORY:** Targeted

**SUMMARY:**

*Update a Phase Status to your configured "Assigned" status as soon as the first Shop Person is assigned.*

**DESCRIPTION:**

This ABP saves time for shop supervisors and managers by automatically updating the phase status to "assigned" as soon as a shop person is assigned to the job.

### PHASE STATUS MATERIAL COMPLETE

**CATEGORY:** Targeted

**SUMMARY:**

*Update a Phase Status to your configured "Material Complete" status in response to completion of a configured Purchase Request or Pick Ticket.*

**DESCRIPTION:**

This ABP saves time for staff by automatically updating the phase status as soon as a material request such as a Pick Ticket or Purchase Request reaches a status with the finalized flag. As this is an update to the Phase status it can drive it back into view for scheduling and/or send email notifications.

### PICK TICKET GENERATION

**CATEGORY:** Targeted

**SUMMARY:**

*Generate a Pick Ticket for the Warehouse upon approval of a Purchase Request.*

**DESCRIPTION:**

Upon approval of a purchase request, this ABP automatically generates a pick ticket for the warehouse, saving the need to do this as a manual step.



## ABP CATEGORY: MULTIPLIER

### CLOSE WORK ORDER/PHASE

**CATEGORY:** Multiplier

**SUMMARY:**

*Close open Work Orders and Phases after a designated number of days since the last edit.*

**DESCRIPTION:**

This ABP automatically closes work orders and phases after a designated number of days since the last edit.

### EMAIL ASSIGNED CONTRACTOR

**CATEGORY:** Multiplier

**SUMMARY:**

*Send an email notification to external Contractors or vendors when a Phase is assigned to them.*

**DESCRIPTION:**

This ABP auto-generates email notifications to external third party contractors/vendors when AiM phases are assigned to them.

### PM DATE GENERATION

**CATEGORY:** Multiplier

**SUMMARY:**

*Generate preventive maintenance (PM) scheduled dates for a configured number of days into the future.*

**DESCRIPTION:**

This ABP automates the creation and update of projected PM dates in your Preventive Maintenance program. In addition to saving time, this ensures your projected dates are always accurate and up-to-date.

### PM GENERATION

**CATEGORY:** Multiplier

**SUMMARY:**

*Generate preventive maintenance (PM) Work Orders for a configured number of days into the future.*

**DESCRIPTION:**

This ABP auto-generates preventive maintenance (PM) based work orders, which eliminates the need to do this manually in AiM.



## ABP CATEGORY: GLOBAL MULTIPLIER

### CUSTOM REQUIRE FIELDS

**CATEGORY:** Global Multiplier

**SUMMARY:**

*Enforce data entry for specific fields on any AiM screen with a hard error (can't save) or soft error (user message).*

**DESCRIPTION:**

Sets fields on any table as required on insert or update. A Hard or Soft error can be generated where they are supported by the AiM screen.

### DYNAMIC DESCRIPTION BUILDER

**CATEGORY:** Global Multiplier

**SUMMARY:**

*Generate descriptions which use the values from selected columns on the AiM screen to provide standardized and actionable descriptions.*

**DESCRIPTION:**

This ABP builds a dynamic Description or Extra Description based on selected columns from the record or associated data.

### FIELD LEVEL AUDITING

**CATEGORY:** Global Multiplier

**SUMMARY:**

*Track data changes to specific fields on any AiM screen by adding a specific Note Type to the screen notes.*

**DESCRIPTION:**

This ABP is configurable to work on any screen that can trigger the Before Update automation and will record the from and to values at a field level to the screen Notes Log with a specific Note Type (e.g., Audit).

### FIELD LEVEL SECURITY

**CATEGORY:** Global Multiplier

**SUMMARY:**

*Limit editing access to specific fields on any AiM screen to only those users with the appropriate Roles.*

**DESCRIPTION:**

This ABP would be configurable to work on any screen that can trigger the before insert and before update automation and throw a hard error warning if the user doesn't have the role assigned to modify the solution that this ABP is mapped to.



## ABP CATEGORY: GLOBAL MULTIPLIER

### REQUIRE NOTES ON STATUS

**CATEGORY:** Global Multiplier

**SUMMARY:**

*Enforce the entry of notes before saving an update when there is change of status.*

**DESCRIPTION:**

This ABP requires field technicians to enter a note on a change of status before updating them (example: work order phase notes).

### STANDARD FIELD DEFAULTS

**CATEGORY:** Global Multiplier

**SUMMARY:**

*Set default values for specific fields on any AiM screen when creating new records.*

**DESCRIPTION:**

Sets fields to default values. Can be applied to any table that supports insert events. Not supported on Rapid Entry or Approval screens. Useful for defaulting offset accounts or data that is rarely changed. Helps to prevent missing data expedite data entry.

## Why FacilityForce

A leader in Integrated Workplace Management Software (IWMS), FacilityForce provides a single, unified platform for all of your facility management needs. A veteran team with 25+ years of domain experience, we are dedicated to continued innovation and constantly listening to your feedback and ideas for improving our current products. At FacilityForce, we're more than just an IWMS solution; we're a family dedicated to the successful management of your organization or community.



### Ready to add functionality?

Reach out to explore how at (833) 377-7638 or [facilitiesales@FacilityForce.com](mailto:facilitiesales@FacilityForce.com)