



Solutions for Field Service  
and Enterprise Asset  
Management plus mobile  
and online form builders

# CASE STUDY

**HORTEC  
STREAMLINES JOB  
MANAGEMENT  
AND ELIMINATES  
PAPERWORK WITH  
PRO-FORMS®**



**CUSTOMER**

Hortec

**SECTOR**



**SOLUTION**

pro-Forms®  
WORK MANAGER

## THE CHALLENGE

Before implementing pro-Forms®, Hortec relied entirely on paper-based job sheets to manage their service operations.

This created a time-consuming and fragmented process. Engineers had to manually locate previous job records from filing cabinets before attending site, record parts used on paper and then revisit the information at the end of the week to complete administrative tasks.

The office team then manually created invoices from handwritten job sheets, often needing to interpret handwriting and cross-reference part numbers. This led to delays, inefficiencies, and unnecessary duplication of effort across the business.

As a specialist service provider working with complex equipment and a wide variety of parts, Hortec required a solution that could adapt to their needs, something more flexible than standard systems designed for more general trades.

## THE SOLUTION

Hortec implemented pro-Forms® WORK MANAGER to replace their paper-based processes with a fully digital system.

The platform provided a flexible framework that could be tailored to their specific workflows. Initial setup and onboarding gave the team confidence to roll the system out quickly, while ongoing flexibility allowed forms and processes to evolve based on real-world usage.

With pro-Forms®, Hortec was able to:

- Digitise job sheets and eliminate paper-based processes
- Capture job and parts information in real time
- Enable engineers to submit job sheets while still on site
- Improve internal collaboration between engineers and office staff
- Adapt forms and workflows based on team feedback
- Easily manage users as the team changes

The system also supports multiple ways of working, allowing engineers to use mobile phones or tablets depending on their preference.

## THE RESULT

**Since adopting pro-Forms®, Hortec has streamlined its operations.** Administrative time has reduced, with no need for manual data entry, scanning or filing. Engineers no longer look up part numbers retrospectively, and handwriting issues have been eliminated.

Stock management has seen a major improvement, with real-time reporting transforming how vans are restocked and inventory is managed. The ability to quickly search job records has also improved visibility and decision-making. Overall, pro-Forms® has delivered a more efficient, responsive and scalable way of working, tailored to Hortec's specialist requirements.

## CUSTOMER COMMENT

“

Not a week goes by when someone doesn't say '**I love pro-Forms®!**'

The ability to get job sheets back while engineers are still on the road, eliminate paperwork and easily track parts has been a real game changer for us. When we need support, it's handled quickly and professionally.

”

— **CAT DUNN,**  
**DIRECTOR, HORTEC**