



## Customer Story

# Full Sail Partners Utilizes Informer 5.4's Templated Output for Clients' Unique Formatting Needs

*Conversation with Wendy Gustafson, General Manager, Full Sail Partners*

### Pain points

- Difficult for non-technical users to create templates independently
- Tedious process to remerge data if one field in the template was incorrect
- Each client has disparate, unique formatting requirements for templates

### Results

- Ability to create custom invoices without previous HTML experience in just one day
- Automation of fields; don't have to update individual forms just because one field changed
- Smart, conditional logic on templates leads to significant time savings



## Full Sail Partners Customer Story

### Challenge

Full Sail Partners in Steamboat Springs, Colorado specializes in client-focused consulting, business strategy, data architecture and software solutions for over 1,000 project-based companies in industries such as architecture, engineering, and environment, amongst others. Wendy Gustafson, General Manager of Full Sail Partners, oversees accounting and human resources, and helps clients develop financial solutions for their organizations.

Gustafson is responsible for the creation of a wide variety of templates for Full Sail and for clients including financial reporting, governmental forms, RFPs, and invoicing. Producing these templates was an extremely manual and overly complicated process. If fields were entered incorrectly in the template, such as an incorrect date on an agreement, Gustafson had to remerge data, a highly time-consuming task. Curating data in a usable format was difficult and every client had unique requirements. Full Sail was missing a solution that could procure data in varying formats that met the specific, individualized needs of the end user.

### Solution

In the testing phase of Informer 5.4, some Entrinsic clients were granted access to the Templates Preview feature. Full Sail Partners started using this new functionality to automate their previously manual form and template creation. In just one day, Gustafson was able to create a polished, professional custom invoice template with no previous HTML experience. She accomplished this by using the standard “Hello World” template in Informer along with learning from internet searches on style sheets. This invoice had boilerplate language including fields for agreement details and signatures.

Informer Templates use conditional logic and essentially act as a smart form. Logic is built-in, for example, 'an' is used in front of fields that start with vowels, and apostrophes are added to fields that end in an 's' when necessary. Gustafson mentioned that she does not have to worry about getting a field, such as address, incorrect as it is foolproof in Informer – all she must do is pull it in directly from the database. She no longer must remerge data if a field is incorrect or change hundreds of forms just because a single detail changed. Informer Templates can be programmed with HTML format and links to add features such as click-to-email or click-to-call. Users can create dashboards and visuals and showcase them within templates. Gustafson also commented that she can do more advanced math within Informer and merge it out than what she was able to do in their previous system.

Templates in Informer are accessible to non-technical users. Once created, processes are incredibly streamlined. Users add input, such as an order number, run the template, and then the report is generated. It can then be exported to PDF.

## Results

With Informer Templates, Full Sail Partners can rerun data as many times as they need on an ad hoc basis to include all necessary information within the template. For every single agreement, Full Sail is saving about 20 minutes, adding up to a significant amount of time saved. Full Sail has future-proofed their forms with Informer by using its ability to populate dynamic fields directly from the database. They are working on merging their templates with Adobe Sign to cut down time spent on Templates even further. Gustafson added that Full Sail was able to get rid of around 50 “throwaway” fields that they had to have previously, cleaning up their Dataset.

Now, Full Sail Partners has a single source of truth that they can always rely on. Instead of debating which of many competing Datasources should be used for making company decisions, everyone can use the same, unified source for all their data needs. This Datasource can be used by anyone, in any way, across the entire organization. Informer’s Client Services team has provided top-notch support to help guide Full Sail throughout the process. Full Sail is coming up with new ideas on how they can use Informer Templates to maximize their benefit. According to Gustafson, with Informer Templates, “The sky is the limit.”



*The sky is the limit.*

**Wendy Gustafson, General Manager, Full Sail Partners**