

Buyers Guide

Are you or your company looking for a mobile field service management solution?

Field Service Management

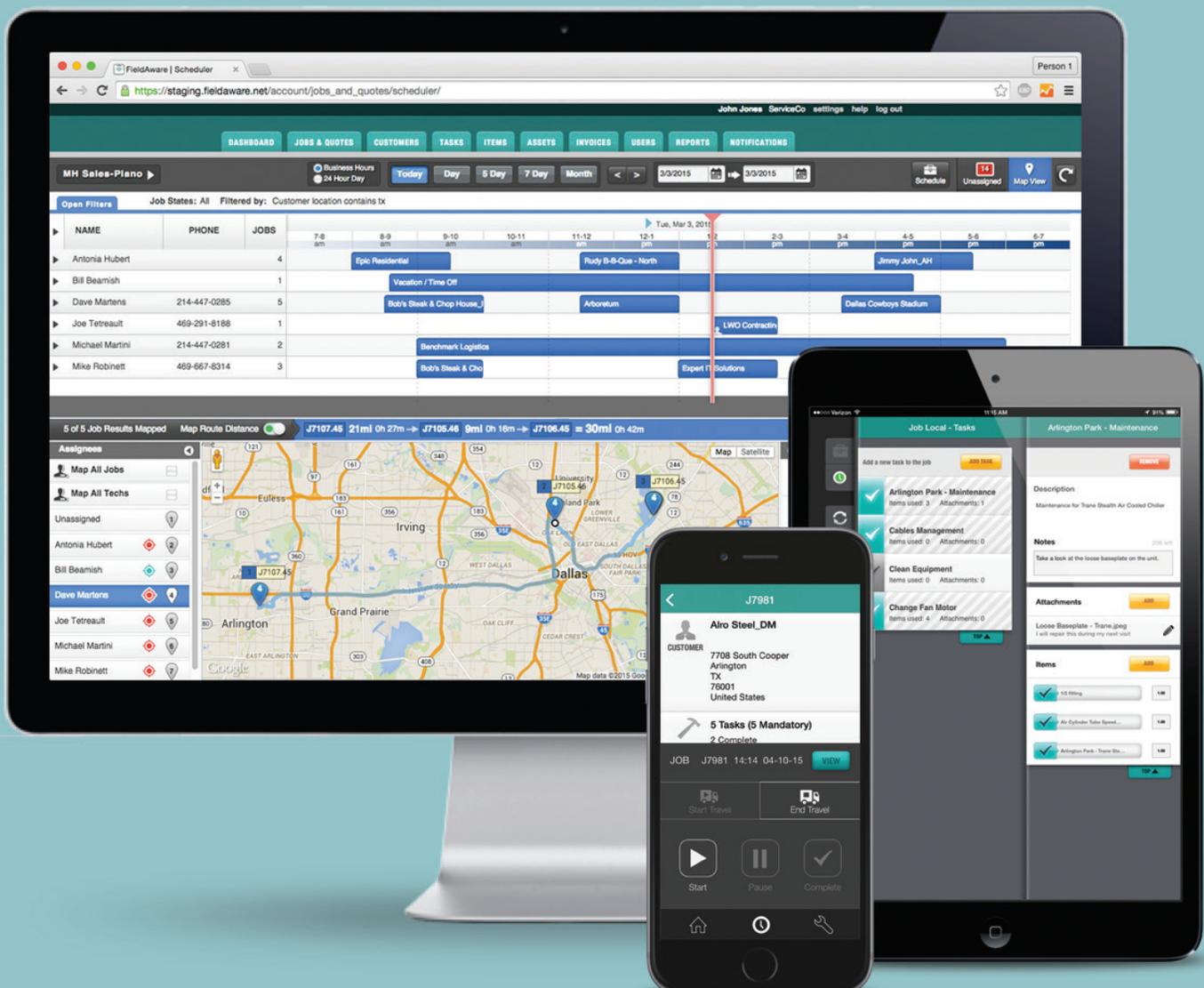


Introduction

Are you or your company looking for a mobile field service management solution? The following guide can help you:

- Understand your current business operations (and how they'll benefit from a mobile field service management solution)
- Identify key capabilities that the industry's best mobile field service management solutions deliver (and why your business needs them)

We hope this document will help you and your company to find and implement a mobile field service management solution that delivers significant gains in technician productivity, company revenue and customer satisfaction.



Current Business Operations

Before you begin the process of understanding today's mobile field service management solutions, it's important to review and document current operations. Following is a list of standard field service operations. How is your company handling them today?



How is your company handling them today?

Write In Current Process



**Work Order
Creation**

Write In Current Process



**Basic scheduling
& dispatch**

Write In Current Process



**Time zone-based
scheduling**

Write In Current Process



**Crew scheduling
& dispatch**

Write In Current Process



**Work order
status update**



Technician location & status check

Write In Current Process

Empty rectangular box for writing in the current process for technician location and status check.



Customer and/or equipment history to technician

Write In Current Process

Empty rectangular box for writing in the current process for customer and/or equipment history to technician.



Match technician skill set to task(s)

Write In Current Process

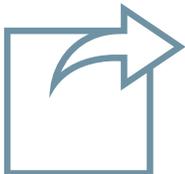
Empty rectangular box for writing in the current process for matching technician skill set to task(s).



Quote & estimate generation in the field

Write In Current Process

Empty rectangular box for writing in the current process for quote and estimate generation in the field.



Work order generation in the field

Write In Current Process

Empty rectangular box for writing in the current process for work order generation in the field.



**Convert
completed
work order
to invoice**

Write In Current Process



**Generate
technician
time sheets**

Write In Current Process



**Technician
productivity,
incomplete job,
and job start
delay reports**

Write In Current Process

Are Many Of Your Current Processes Manual?

Are technicians wasting time (and gas) ferrying work orders to and from the office? Is office staff retyping data in completed work orders back into your accounting system (while trying to decipher the technician's handwriting?) A mobile field service management solution can turn those wasted hours into productive ones. Hours that can help your company increase revenue - without the need to hire additional staff.

But, it's also important to find the right field service management solution. One that is easy to implement, easy to use, and easy to integrate with your existing business systems (Accounting, ERP, CRM, etc.). A system that is made for today's mobile environment.

Mobile Field Service Management Checklist

Next it's time to talk to the vendors. Following are some key questions to ask - and capabilities to look for - to ensure that the solution you choose will deliver the business benefits you expect.



Vendor Technology & Background Questions



Is the solution premise based (installed on servers in your data center) or cloud-based?

If the system is premise based, is your company prepared to accept the cost of servers, storage, ongoing maintenance, software upgrades - and the solution itself?

Write In answer



Was the solution designed for today's mobile, cloud environment (or was it originally an on premise server, PC solution)?

Solutions NOT designed for today's mobile cloud environment contain legacy software that is more difficult to update and improve. Performance can also suffer in solutions that were not designed for mobile devices and the cloud.

Your answer

No

Yes



Is the solution hosted in geographically diverse locations?

Hosting center geographic diversity and redundancy are important to ensuring that your solution will be available whenever and wherever you need it.

Your answer

No

Yes



How often is data backed up?

Frequent backups ensure that no data is lost - even in the event of a power outage or natural catastrophe.

Write In answer



Are the data center - and mobile transmissions secured?

Frequent backups ensure that no data is lost - even in the event of a power outage or natural catastrophe.

Your answer

No

Yes



**How many customers does the vendor have in your industry?
Are references available?**

You'll avoid missteps and delays in implementation if the vendor has solid experience in your industry.

Write In answer



**Where is customer service based?
Is it staffed by English speaking staff?**

If and when problems occur, they'll be fixed faster if you can communicate with customer service personnel effectively.

Write In answer



Are there additional charges for software upgrades?

The cost of the solution will rise if upgrades aren't included as part of the system.

Your answer

No

Yes



What is the average length of the implementation process for a company your size? How much will it cost?

Implementation delays are costly. Your company will have to devote extra man hours, and you'll be losing out on the productivity and revenue benefits of the solution.

Write In answer



Does the vendor make regular contact to ensure all issues are addressed and to learn about new business requirements your company might have?

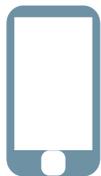
The success of a mobile field service management solution is often dependent on the vendor's willingness to continuously learn more about your business as well as how their solution can be improved to meet your company's future requirements.

Your answer

No

Yes

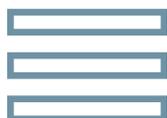
Solution Features



Is the mobile app native or based on HTML5?

Native apps take advantage of the capabilities resident in the operating system like photo/video capture, voice recognition and many others. They also allow users to enter data and perform nearly every function - even when a network is not present. Finally, native apps optimize data updates. This keeps data charge low and enables companies to choose lower cost mobile data plans.

Write In answer



Are custom fields supported and if so, are there any limits on the number or types of custom fields?

Businesses are similar, but no two are alike. To ensure that your company's unique business processes are supported, the solution should support an unlimited number and type of custom fields.

Write In answer



Does the solution have standard connectors to your existing

If your company already uses a standard accounting package like QuickBooks or an ERP system like NetSuite, implementation and integration with those systems will be faster and more error free if the solution already has standard API-based connectors to them.

Your answer



Does the solution include a JSON-based API?

JSON-based API's are the easiest and fastest to implement. They use simple English terms (that anyone can understand). That makes integrating them into your existing business application architecture simple and straight forward.

Your answer



Can schedulers and dispatchers view the status of every job and every technician in real time

The ability to see the status of every job and every technician in real time makes scheduling and dispatch of new work more efficient and allows customer service personnel to more accurately communicate the status of work to customers.

Your answer



Can work orders be scheduled and dispatched to crews with a crew lead? Can crew members be added to a job in real time?

Not every work order is a one man job. The system you choose should support crew management (including the ability to set up default crews) and have the flexibility to add personnel to an existing work order in real time.

Write In answer



Are editable PDF forms supported?

Editable PDF forms are great for compliance, check lists, any paper form (besides a work order, quote or estimate) that your company currently uses. Another way to eliminate the paper and improve the productivity of your staff.

Your answer

 No

 Yes


Are photo and document attachments supported?

On the job photos are a great way to prove that a task has been performed. Attachments can also be used to include schematics of equipment for the technician, a video that demonstrates a specific procedure or a maintenance contract that outlines tasks that are chargeable and those that are not.

Your answer

 No

 Yes


Does the solution provide mobile access to all customer information - contacts, locations, work history, equipment?

Make sure that the solution provides all the information a technician needs to do their job quickly and efficiently!

Your answer

 No

 Yes


Does the solution include the ability to limit the visibility and/or functionality of the solution on a per user or per group (dispatcher, manager, technician, office staff, contractor) basis?

Often termed “roles and rights”, the ability to limit what a user sees or can do can be very important. For example: if your company uses contractors for some jobs or at peak times, you might want to bar them from generating quotes or new work orders.

Your answer

 No

 Yes



Does the solution allow companies to customize invoices and other customer facing documents?

The mobile field service management solution should help your company extend its brand - through the documents (invoices, quotes, etc.) that it delivers and the efficient, high quality work the technicians perform.

Your answer

No

Yes



Does the solution track employee work and travel time? Can time tracking data be exported for use in HR applications?

Tracking time through the mobile app can help limit erroneous overtime costs and reduce payroll errors.

Write In answer



Does the solution include the ability to enter a customer location by street address and latitude/longitude coordinates?

Getting to a customer location should never be a problem - even if the customer is located in the middle of an open field!

Your answer

No

Yes



Does the solution provide real time notification of new work orders?

Text messages and emails are clumsy and slow. Solutions that provide real time notifications ensure that messages are lost or erased and every job is handled quickly and on time.

Your answer

No

Yes



Does the solution support both instant electronic invoicing and the printing of documents (invoices) in the field?

Sometimes customers don't want an electronic invoice. Make sure your solution can deliver invoices in the way most appropriate for each customer.

Write In answer



Does the solution enable technicians to generate quotes and estimates? Does it support electronic acceptance of those quotes and estimates?

One of the most effective ways to generate more revenue is to allow technicians to suggest additional services or equipment upgrades while on the customer location. Make sure your mobile field service management solution can help your company build revenue!

Write In answer

Conclusion

Mobile field service management solutions can help companies to improve productivity, generate more revenue and increase customer satisfaction. It's important therefore to choose a solution that is best suited to help your company achieve those goals.

FieldAware's made for mobile field service management solution is designed to help the most important people in every field service organization - the technicians - to be more productive, generate more revenue and increase customer satisfaction. Technicians can access all the information they need for any job, any location, any customer - from the palm of their hand.

Looking for a field service management solution that will help your company realize the full potential of your field service management investment? Contact FieldAware for more information.

About FieldAware

FieldAware are re-shaping the field service industry. Our made-for mobile, cloud-based software was designed from the ground up to provide ease of use with incredible flexibility. This combination enables field service organizations to enable their field teams and deliver customer service excellence. Our software was architected as a mobile platform, with no incumbent legacy technologies.

Based on our founders' intimate knowledge of the unique needs of engineers and technicians in the field – and the operational personnel and management that support them – FieldAware is focused on providing field service organizations, both large and small, with:

- **Intelligence about your Customers:** So you can increase revenue, expand into new markets, differentiate your services and create customer advocates.
- **Intelligence about your Business:** That enables you to increase the productivity of your staff, use company resources more efficiently, simplify your business processes and “right size” your parts and repair inventory.

We combine our software with the industry's best implementation, on-boarding and support services enabling companies to take full and rapid advantage of today's mobile environment.

To learn more about our solutions or to schedule a demo:

Call us on

US and Canada **800-935-0736**
UK **0800 098 8487**
Australia, APAC **1800 821 628**

Email us at sales@fieldaware.com
Visit www.fieldaware.com

