expand it

INCREASE PRODUCTIVITY BY CONNECTING YOUR TEAMS

TOP 5 WAYS TO SIMPLIFY FIELD OPERATIONS AND IMPROVE OFFICE EFFICIENCY

LET'S ADMIT IT...

Some work tasks seem tedious and redundant over time. Often these time-consuming manual tasks take time away from what breathes life into your business, such as providing high-level customer service and thinking of new innovative ideas for the company.

It's essential to think outside the box and look for new ways to succeed. Leverage field service best practices to improve your business. These include sharing real-time information, tracking field technicians and jobs, connecting customers and field technicians, capturing information in the field, and integrating field service with your ERP system.

There isn't a single strategy that will work for every company offering field services, but these best practices are a great place to start.
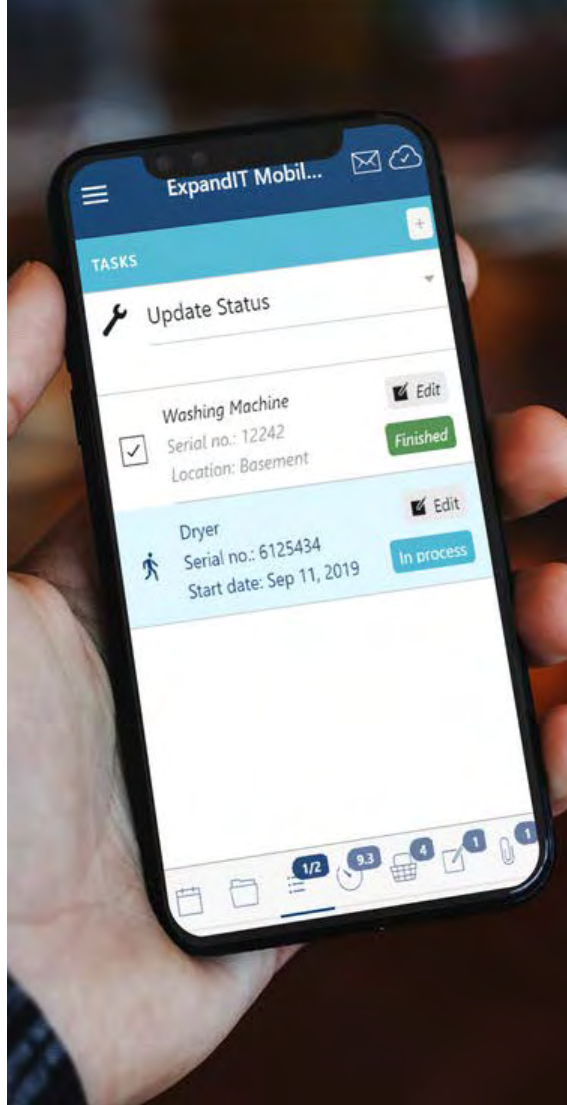
SCHEDULING

Empower resource planners and dispatchers to make intelligent decisions by providing them with all of the information they need in one place. Enable them to easily schedule and adjust plans as information changes or updates are made. Share changes to schedule in real-time with field technicians and customers.

ExpandIT Field Service software provides dispatchers and field technicians with the information they need, whether they are in the office or field. Both dispatchers and technicians have complete visibility into work orders, parts availability, checklists, historical job details, etc. Field technicians can work online or offline and accurately track tasks, materials, and time associated with jobs. In addition, they can communicate important information in real-time through texts, emails, or internally in the solution.

Streamlining your job order planning and scheduling process is one of the most effective ways to improve field service operations, increase efficiency and customer service.

TRACK FIELD TECHNICIANS AND JOBS

JOB ORDER MANAGEMENT

A well-executed job order planning and scheduling process provide visibility to all personnel involved in the process. In addition, it supports dispatchers, allowing for real-time visualization of key parameters for resource allocation, such as job completion, travel time, technician skills, geo-position, and more.

ExpandIT Resource Planning includes a Planning Board that utilizes the available information from Microsoft Dynamics ERP systems in combination with information from the field to enable dispatchers to make informed decisions. In addition, the software allows dispatchers to communicate with both the customer and service technicians using SMS, email, or phone.

CONNECT YOUR FIELD AND CUSTOMERS

REAL-TIME COMMUNICATION

Improving the communication of jobs orders to field technicians is essential. Dispatchers must ensure technicians know what tasks they need to complete (where and when) and are equipped with the information to finish them successfully.

The ExpandIT solution enables dispatchers to communicate with customers and field technicians using SMS, email, or phone. It is a powerful and user-friendly solution that allows organizations to improve fix time rates by seamlessly connecting field operations to back-office functions. In addition, technicians can view scheduled jobs on their mobile phone or tablet and other information such as previous job orders and customer history.

Customers can use ExpandIT's Service Portal to communicate with technicians, request service, see the job status, view past invoices, pay invoices online, and view past service orders and reports.
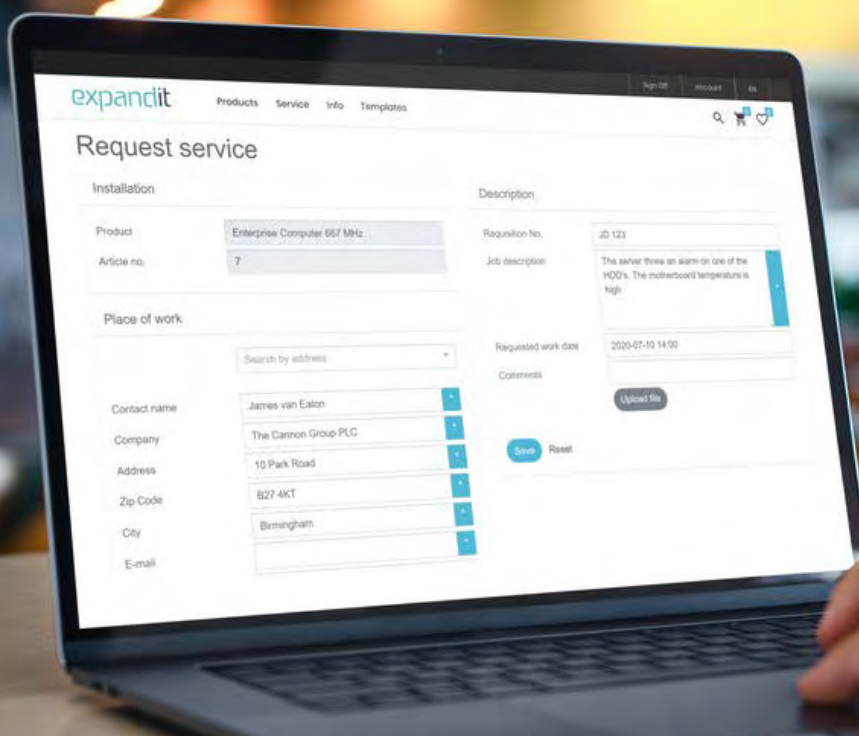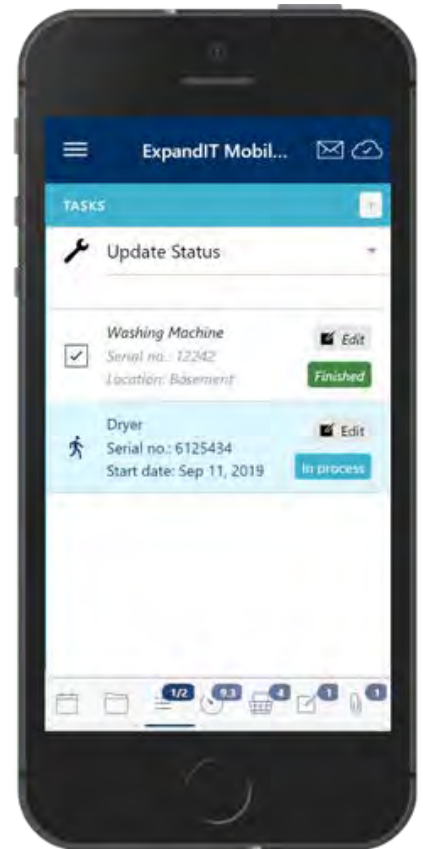
CAPTURE INFORMATION IN THE FIELD

Eliminating paper forms and manual entry is one of the most effective ways to improve field service operations, increase efficiency and enhance customer service.

DIGITAL FORMS

Are you buried in paperwork and manual processes?

Paper forms and reports slow down business and open you to errors or lost information. Digital forms expedite communication between the field and the office, reducing the need for field technicians to go into the office just to drop off paperwork.

ExpandIT software enables you to create digital forms. Eliminating paper forms that are often misplaced, ripped, or rained on. Signatures and paperwork are not forgotten, making them a mandatory part of the service process. Field technicians can edit work orders anytime and anywhere, online or offline.

The ExpandIT form builder is easy to use and enables you to create custom forms with drop-down boxes and predefined answers.

INTEGRATE FIELD SERVICE SOFTWARE WITH ERP

INTEGRATION

Many software applications may be used as standalone solutions to support business processes, but the real benefits are gained when multiple systems communicate. For example, if you choose to integrate your field service software with other systems, you can automate tasks and make it easier for the dispatchers to streamline the technicians' workflows.

ExpandIT Resource Planning integrates with Microsoft Dynamics ERP systems. This means data can be retrieved as required, enabling field technicians to prepare more effectively for a service visit. For example, once a job is completed, you can review it with the Approval Module and fix hours, materials, etc., before it goes into the ERP system.
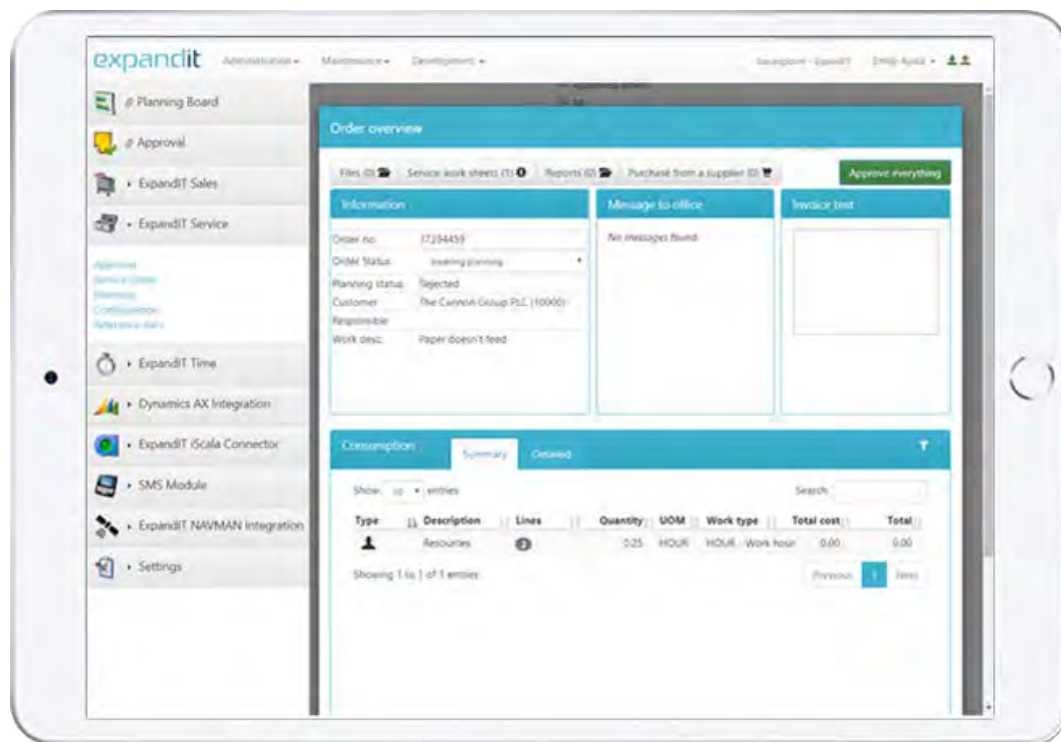
FIELD SERVICE SOFTWARE WILL HELP YOUR BUSINESS:

- EMPOWER YOUR MOBILE WORKFORCE

- STREAMLINE PROCESSES

- IMPROVE COMMUNICATION

- AUTOMATE TASKS

CONTACT US TODAY TO FIND OUT HOW EXPANDIT CAN HELP YOUR BUSINESS!

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