

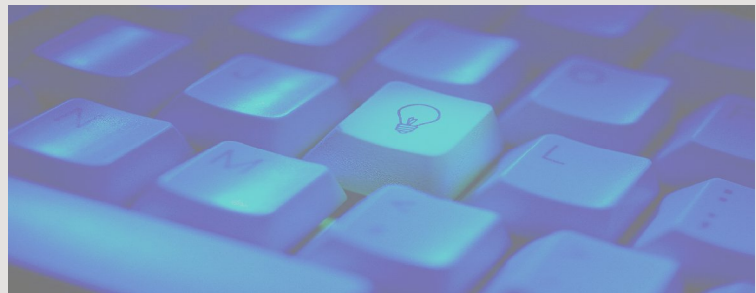


A Short Guide to Field Service Automation

What is Field Service Automation?

All field service companies share one thing in common: they send technicians to customer locations to perform work. Over the past several years, field service companies large and small have begun to use technology (software and hardware) to make this process more efficient and increase revenue.

Certainly, most companies have at least automated their accounting functions using well-known software products such as QuickBooks or Peachtree. The next step up is to automate the entire service process itself – from estimates to collections – including access to all the information it generates. This is known as “Field Service Automation” (FSA), or “Field Service Management.” Dozens of software vendors have developed products to do just that.



What Can Automation Do?

The experts at **myCTO** have put together brief descriptions of the general features that are common to nearly all FSA software products. Keep in mind that not every product has every feature and that each product does things in a slightly different way.

You'll need to research the products in depth to learn how they handle each feature. You can find and purchase this information on the **myCTO** website (www.mycto.com) in our **Product Roundups™** and **Product Detail Reports™**.

Customer Management

This is a collection of features that gives you access to everything you need and want to know about your current customers: locations, service contracts, work orders, service and billing history, and so on. Customer management might also include features like customer equipment lists and warranty information. In addition, most products enable you to set up recurring work orders for your customers.

Scheduling and Dispatch

The Scheduling feature allows you to create and view work schedules for your technicians in different ways. You can look at an individual's schedule – or everyone's schedule at once – by day, week, or month. Most products have what's known as a “drag-and-drop” interface. This means that you can click on a scheduled job, move it around the screen, and then “drop” it onto an open slot on the schedule.

Companies with daily schedules that remain generally unchanged with few or no “emergency” work orders from customers would probably find this feature to be adequate. However, if your technicians' schedules change frequently throughout the day or they rarely come into the office to check in, then you might be better off with a product that has a Dispatching feature.

Dispatching is a more dynamic kind of scheduling in which your technicians receive updates to their work orders during the day. This feature allows you to quickly, easily, and efficiently notify technicians of incoming work orders. Wireless technologies enable you to download job and customer

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information to your technician's cell phone, PDA, or laptop in real time.

Mobile Workforce

This has become a major focus of FSA in recent years. Using wireless devices (cell phones, PDAs, laptops, and specialized devices) to give technicians the ability to quickly get all the information they need to complete their jobs is part of almost every software package we've researched. Some software vendors will lease you the wireless devices, too.

Technicians can update work orders, capture signatures, read barcodes, and create invoices on the spot. Automated scheduling and dispatch is another important feature in this category. Technicians can be assigned to a job based on their proximity and sometimes their skill levels, as well.

Other features include mapping, route optimization, and GPS capability. All of these things are meant to enable the right technician to get to a jobsite quickly, complete the job correctly, and even update the paperwork right at the customer's location.

Job Tracking

These features are important for companies that often handle large, complex types of jobs at customer locations. You have the ability to assign technicians and crews, track the job's status, bill the customer in installments, and do job costing. Products that can handle these complex jobs usually track inventory, customer equipment, service contracts, and labor charges.

Billing and Accounting

Most products are able to communicate with QuickBooks, Peachtree, and other accounting packages. Some can only accept customer names, while others have a full two-way linkage enabling them to exchange customer, invoice, and job costing information. A small number of products have their own accounting functions built in, which means they don't need to communicate with other accounting software.

Invoicing is frequently an automatic process in these products. For example, a proposal becomes a work order, incorporating labor charges and equipment from inventory, plus service contract or maintenance fees, which then becomes the customer's invoice.

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You can also set up recurring invoices or do progress billing. Many of these products support third-party flat-rate pricing systems.

Inventory & Fleet Management

The inventory features of many products can handle multiple warehouses, barcode scanning, and purchase order tracking. You can even use your trucks as mobile warehouses and track the tools and equipment contained in them.

Automatic reorder levels can be set, as can discounts and mark-ups. Inventory can also feed into the invoicing piece by letting you set specific price levels for each customer.

Fleet management is another important part of some products. You have the ability to track vehicle usage, repairs, maintenance, and warranties.

Employee Management

Information about your employees can be managed from within some FSA products. You can track employees' hours worked, skill levels, vacation time, and labor rates.

Marketing and Sales

Almost every product we've found will let you create proposals and estimates for prospective customers. This gives you an easy way to track these prospects and turn them into customers. Some products will also help you manage your direct mail and email marketing campaigns.

Integration with Other Software

All of the products we've researched "play well" with other software packages, primarily accounting software. As we mentioned before, QuickBooks and Peachtree are the most common ones that can communicate with these products.

Mapping functions are usually handled by Microsoft MapPoint. GPS capability is taken care of by software such as SageQuest. Although all these products come with many pre-formatted reports, you can also create your own using Crystal Reports. The higher end products offer data export and import utilities and will sometimes build custom linkages, or interfaces, to other software packages if needed.

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Data Management and Security

It's very important to be able to manage who has access to the data contained in whichever FSA system you end up using. Most products let you assign different levels of passwords to each employee. For example, you could limit an employee's access to certain parts of the system (scheduling, inventory, etc.), or to certain functions (updating or read-only). We've also found that some products have an audit trail capability which shows you who entered data and when.

Another very important feature is data backup and recovery. Many products offer these functions, but those that don't will require that you handle this on your own.

Special Features

Some products have unique features that set them apart from the rest. The most interesting we've found are support for foreign currencies, integration with caller ID, and a help desk feature that lets you troubleshoot a customer's problem over the phone.



What's the Next Step?

Now that you have a basic idea of what to expect from FSA software, you need to think about how these products would fit in with the way you run your business. Here are some questions you might want to ask yourself:

- *What's your budget for software and hardware purchases and upgrades?* Remember to account for installation, training, technical support, and data conversion costs in your budget.
- *What features are most important to your business?* Try to anticipate your future needs as well as the current ones.
- *Do you want to have the software installed at your location or hosted by the vendor?* See the free article [*A Short Guide to Software On Demand*](#) available on our website (www.mycto.com).
- *What software do you currently use that the new system would need to link to?*
- *Will you use the new software on your current computers or do you need to upgrade them? Are your computers connected to each other in a network?*
- *How will you make use of wireless technology in your business?*

Our **Product Roundups**[™] can help to focus your research by organizing the dozens of products into manageable groups. We've investigated each product thoroughly, read the research articles, and spoken with business owners to come up with the important characteristics that field service businesses look for when they choose their technology. These downloadable reports will save you valuable time and effort during the beginning stages of the evaluation process.

It's ultimately your decision, and **myCTO** will be right there with you to give you the tools you need to make the best choice possible.

myCTO is dedicated to helping small businesses evaluate and select the right software to run their businesses more profitably. We act as a "Chief Technology Officer" to small companies, giving them access to the same quality of research and analysis available to large companies. Visit our website at www.mycto.com or email us at info@mycto.com to learn more.