



WEBINAR

The future of customer engagement:

the power of automation for exceptional customer service



The power of automation for exceptional customer service



Agenda

01

→ PROCESS AUTOMATION

Keep your customers engaged

02

→ FIELDCODE IN ACTION

Configuration in Fieldcode



Speaker

Verena Wechsler

Software Trainer & Consultant

-01-

Process automation



Process automation in Fieldcode

→ API Connector

→ Workflow automation

→ Automated actions

→ Ticket info

→ Dispatching

→ Customer portal

API connector



→ **CRM**
Customer Relationship Management

→ **ERP**
Enterprise Resource Planning

→ **ITSM**
IT-Service Management Software

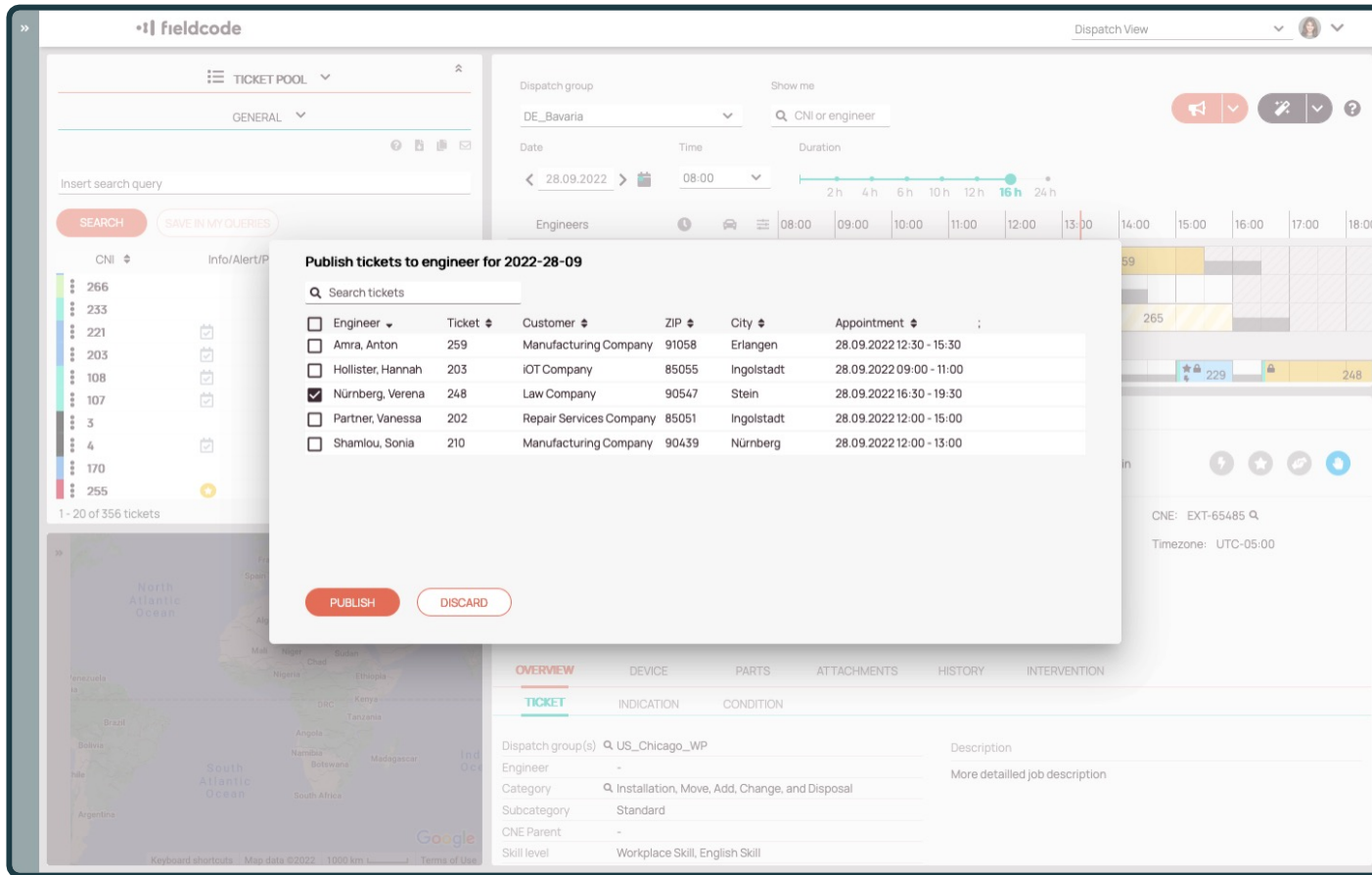


Workflow automation



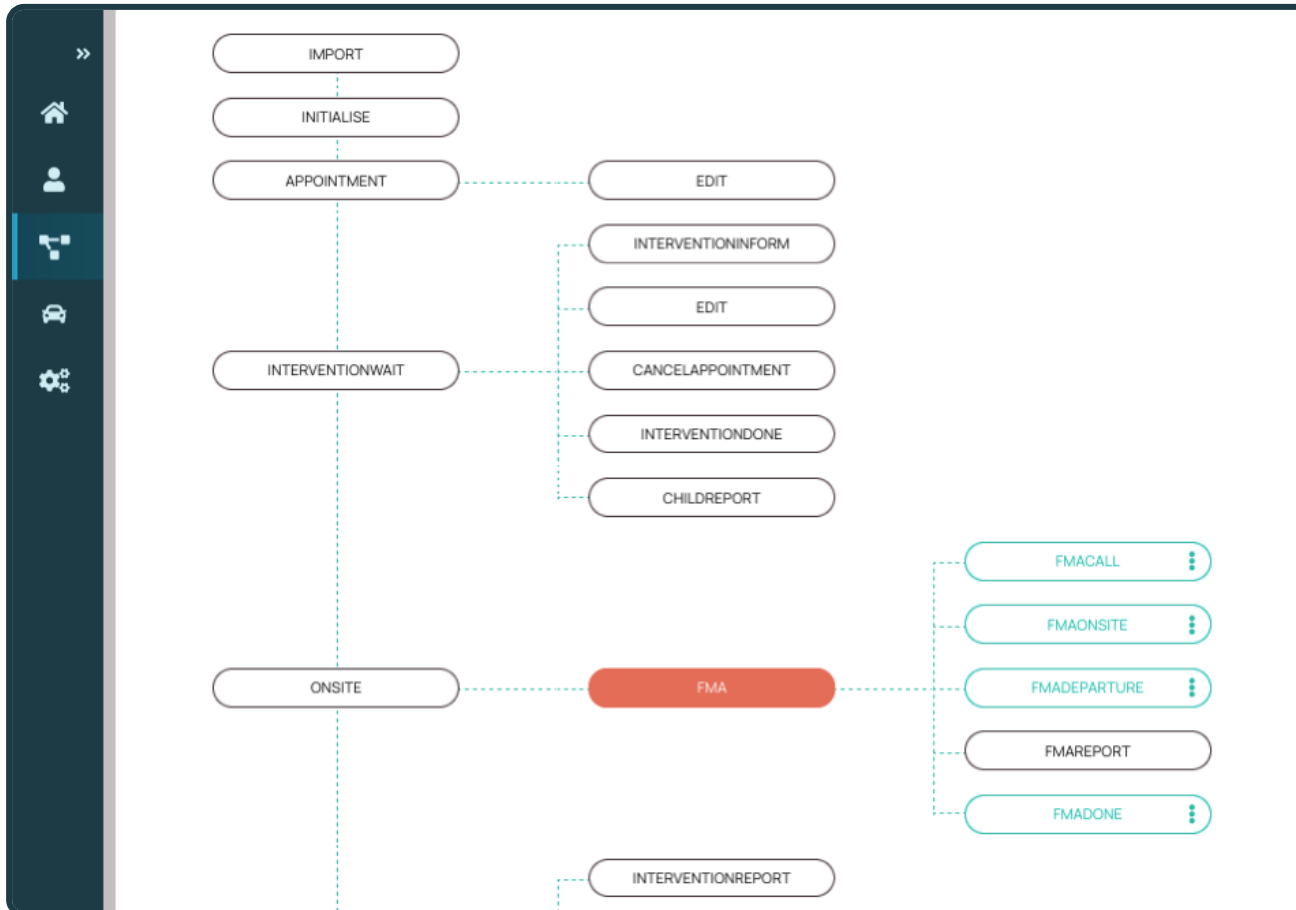
- Ticket validation
- Just-in-time publishing
- Status automation

Workflow automation



- Ticket validation
- Just-in-time publishing
- Status automation

Workflow automation



- Ticket validation
- Just-in-time publishing
- **Status automation**

Automated actions

<input type="checkbox"/> Select all filters History Ticket info Email log LSDT updates Time log Call log			
	Timestamp	Type	Summary
	08.12.2022 10:40	State	RESOLVED
	08.12.2022 10:40	State	DONE (FMA)
	08.12.2022 10:38	State	REPORTING (FMA)
	08.12.2022 10:38	State	IN_PROGRESS_ONSITE
	08.12.2022 10:38	State	ONSITE (FMA)
	08.12.2022 10:35	Ticket Info	Delays when dealing with a ticket / Up to 30 min
	Created	08.12.2022 10:35	
	Message	Up to 30 min	
	Type	Delays when dealing with a ticket	
	User	verena.wechsler.ext@fieldcode.com	
	Acknowledged	-	

→ Workflow triggers

→ History logs

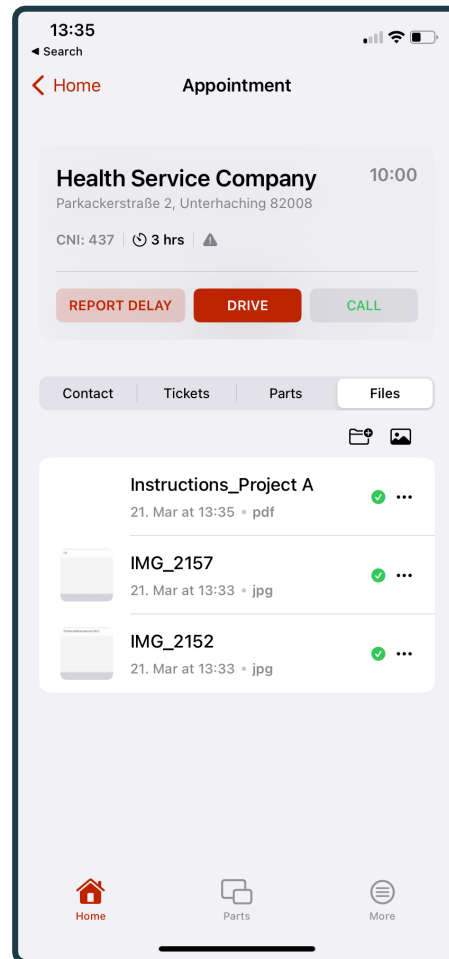
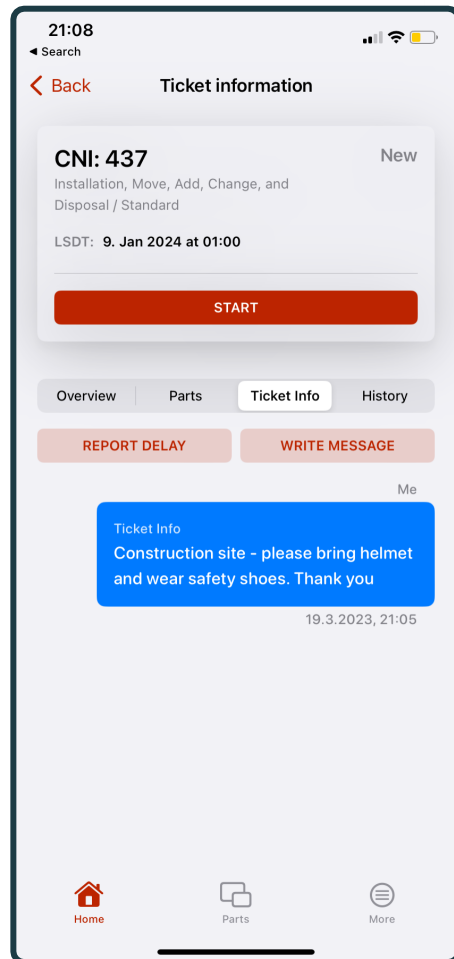
→ Communication

Ticket info

The screenshot displays a ticket management interface. At the top, the ticket ID is 440. Key details include: Project: Server Support, Status: PENDING WAIT ONSITE, and LSDT Counter: 305d 7h 56min. Contact information for the Client Contact is provided: user@mail.com and +4912345678. The location is Marketing Company, Münchener Str. 143, 85051 Ingolstadt, Germany. Appointment details show a date of 21.01.2024 01:00, a CNE of E-88833, and a time zone of UTC+01:00. A feedback comment from an engineer is visible, along with an ACKNOWLEDGE button. At the bottom, there are buttons for COMS and UNPUBLISH. A 'Write a Message' modal is open, showing options to message the Dispatcher or the Customer, with the text 'I'm' entered in the message field.

- Structured coms
- Instructions & checklists
- Highlights & warning

Ticket info

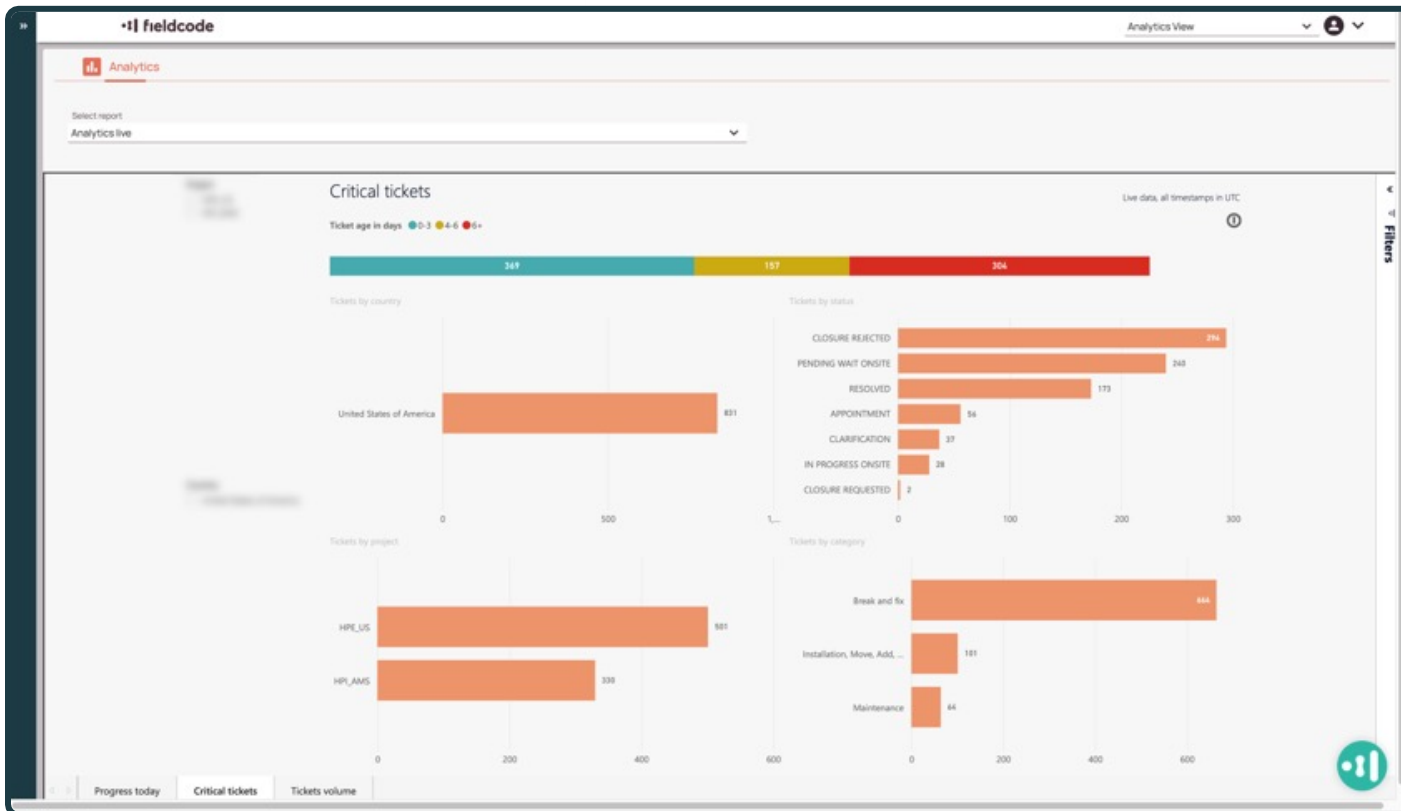


→ Structured coms

→ Instructions & checklists

→ Highlights & warning

Ticket info



- Structured coms
- Instructions & checklists
- Highlights & warning

Dispatching

Schedule ticket - CNI #439

End user not reached Assign engineer only
 Callback required
 Set proposed appointment

We show you the quickest delivery with the closest engineer in green. Try to fix this timeframe with your customer for your team's optimal time allocation.

Client Contact
user@mail.com
+4912345678

Talked to

March 2023

Mo	Tu	We	Th	Fr	Sa	Su
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

Selected date Engineer available LSOT date Over LSOT

UPDATE LSOT

Time preference
Full day 09:00 - 17:00 +

Engineer preference Engineer check is complete

Search Lock engineer

Amra, Anton Cebotare, Vita Hollister, Hannah Jonas, Jens
Mauri, Myra Nürnberg, Verena Olster, Oliver Partner, Vanessa
Shamlou, Sonia

SAVE CANCEL

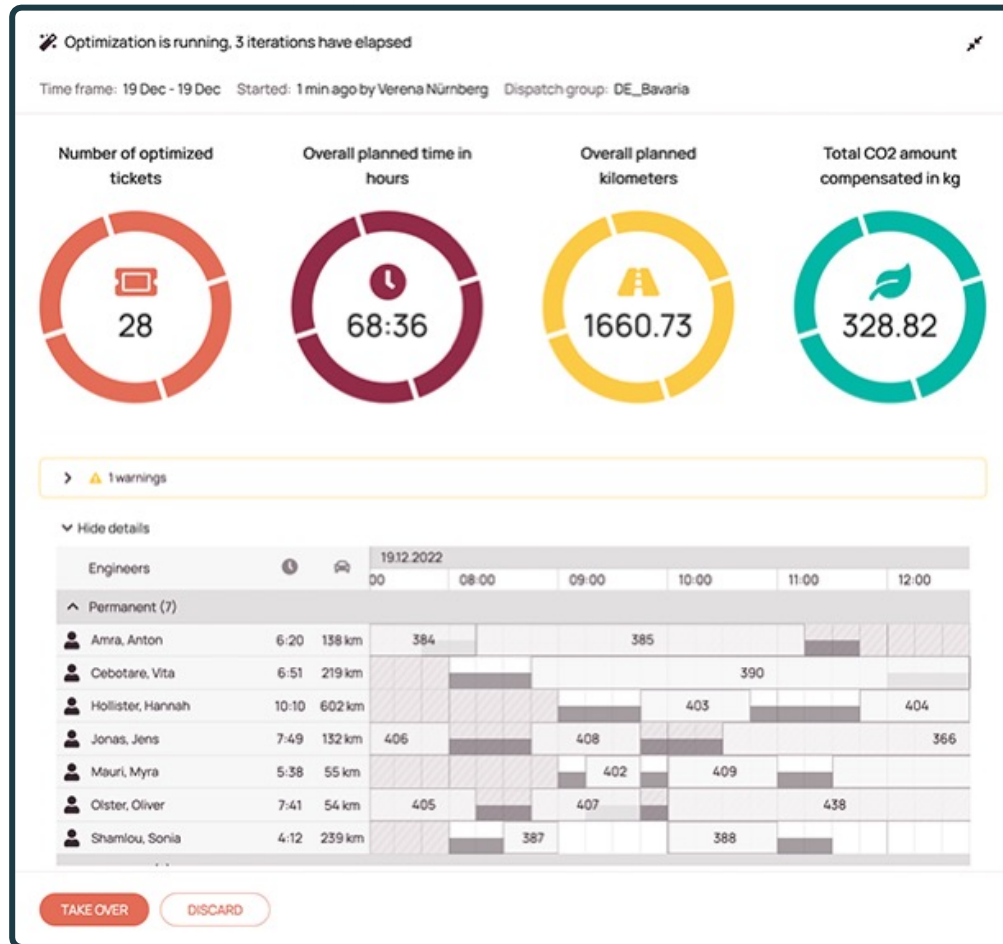
→ Scheduling assistant

→ Automated dispatching

→ Route optimization

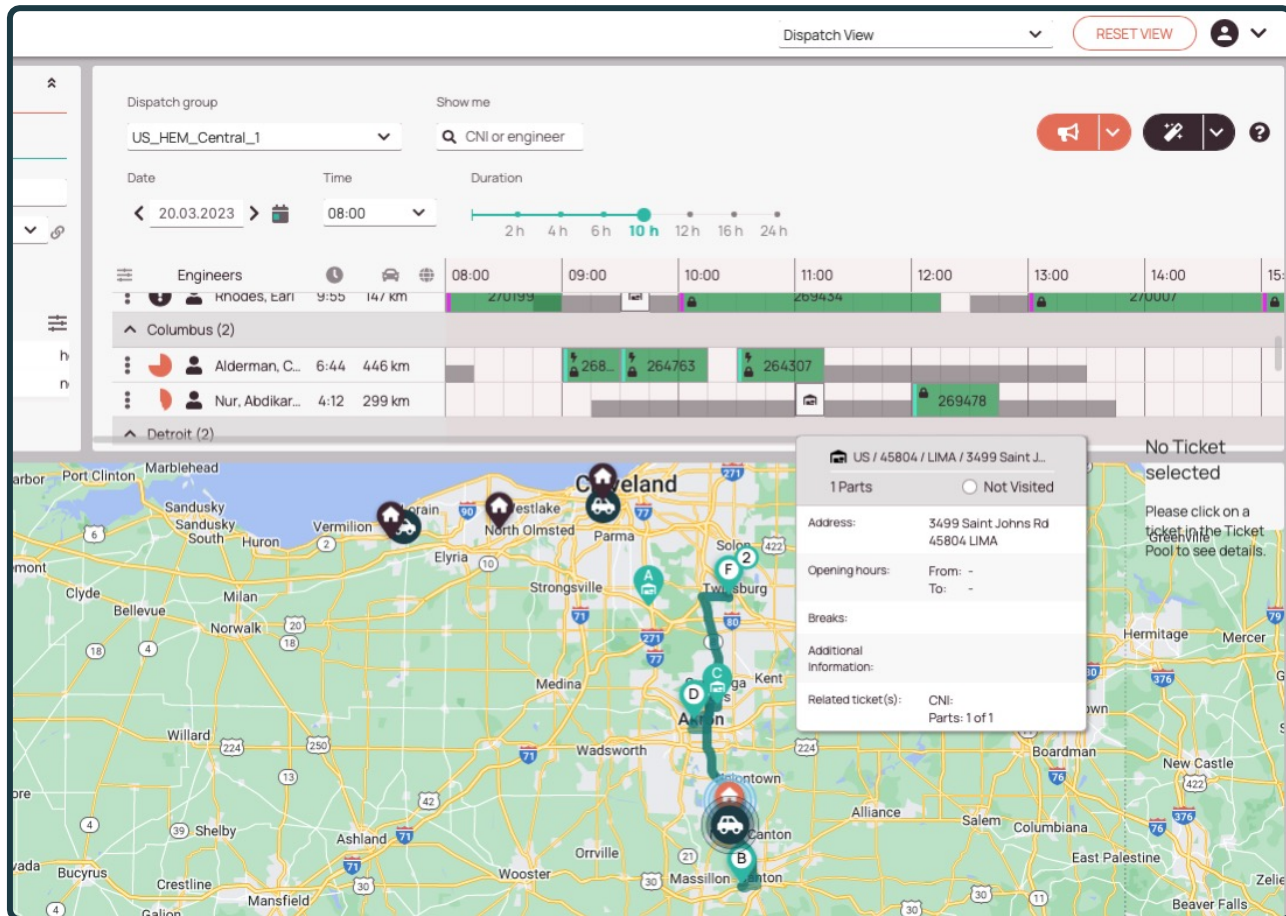
→ PUDO optimization

Dispatching



- Scheduling assistant
- Automated dispatching
- Route optimization
- PUDO optimization

Dispatching



- Scheduling assistant
- Automated dispatching
- **Route optimization**
- **PUDO optimization**

Customer portal

fieldcode Customer Portal

Welcome!

No appointment has been set yet for ticket with Reference 356. If you wish to schedule an appointment with a technician, please select your preferred date and timeframe below.

Please select your preferred appointment date

Oct: 2022						
MO	TU	WE	TH	FR	SA	SU
26	27	28	29	30	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31	1	2	3	4	5	6

Today Suggested appointment Your selected date

LSOT date

Engineer availability timeframe: Full work day

Our technician is expected to be with you on Oct 19, 2022

I acknowledge that the selected preferred appointment is binding for the ticket with reference 356. Any previously arranged appointments will be cancelled. In case an appointment is selected outside the latest service commitment date, I agree to adjust the service commitment date accordingly.

CONFIRM APPOINTMENT CANCEL

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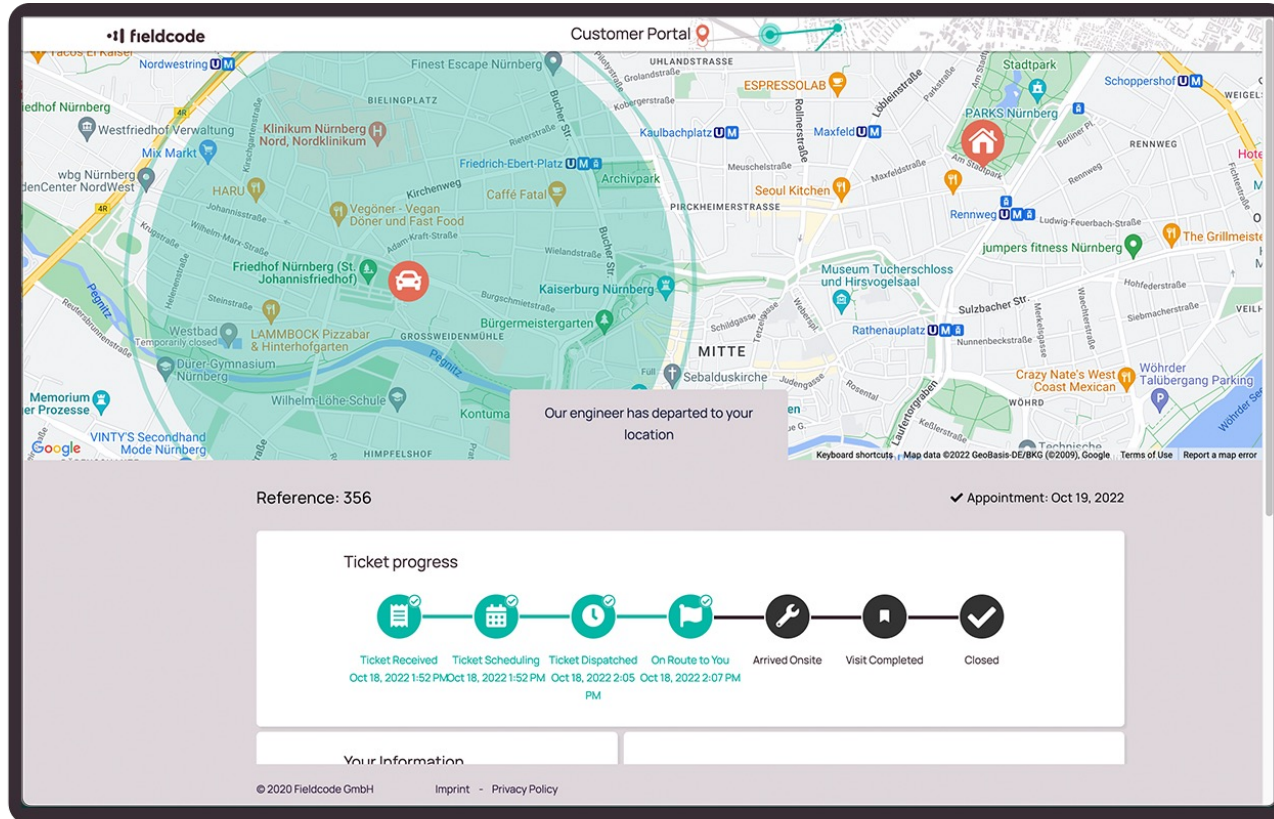
→ Book appointment

→ Reschedule appointment

→ Engineer tracking

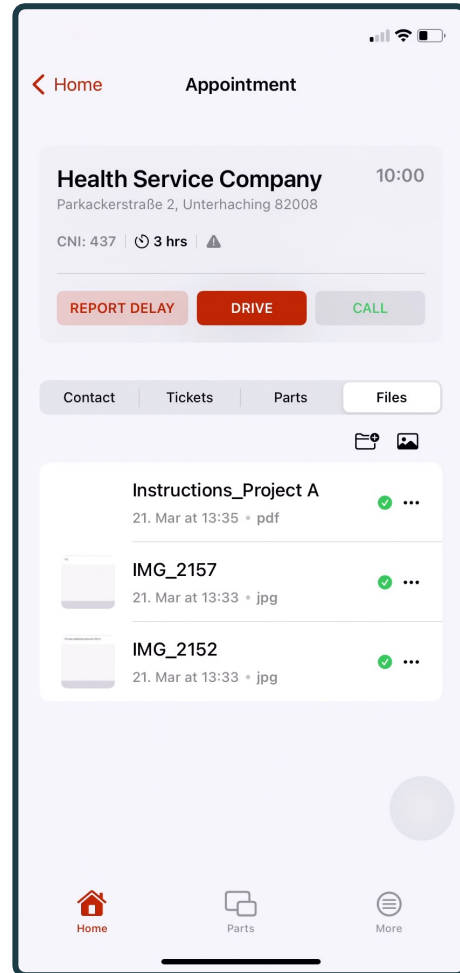
→ Report delay

Customer portal



- Book appointment
- Reschedule appointment
- **Engineer tracking**
- Report delay

Customer portal



- Book appointment
- Reschedule appointment
- Engineer tracking
- **Report delay**

-02-

Live demo



KPI improvements

Workflow automation,
PUDO planning



First time fix rate ↑

Customer portal,
automated actions



Customer satisfaction ↑

API connector,
automated dispatching



Administrative effort ↓

Customer portal,
ticket info



Touchpoints ↓



Automate your service and boost customer experience through proactive field service management.

Got more questions?
Great! Let's set up a meeting
to answer those!

Verena Wechsler

Software Trainer & Consultant

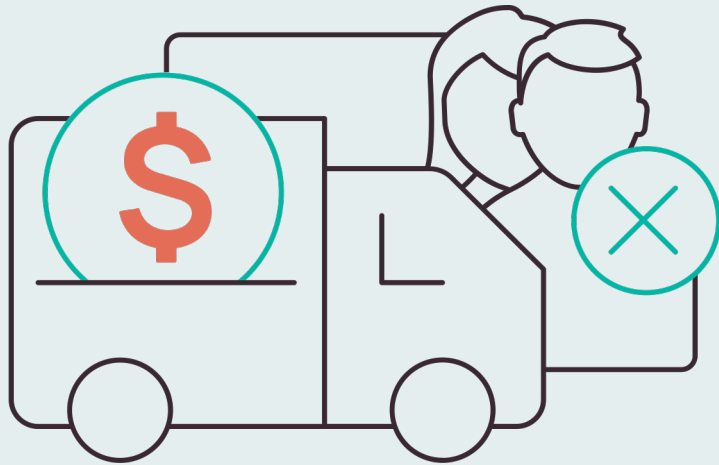
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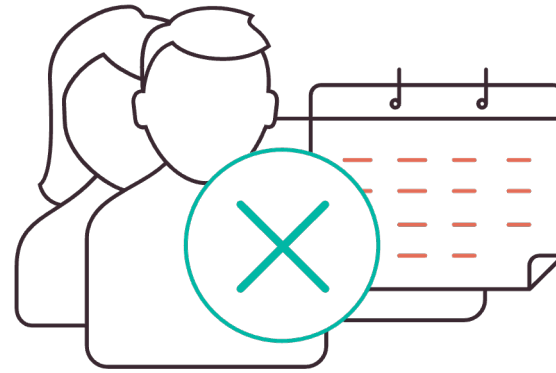
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demo@fieldcode.com
fieldcode.com

How does it work



→ Pay-per-event, not per user



→ No subscription required



→ Control your costs

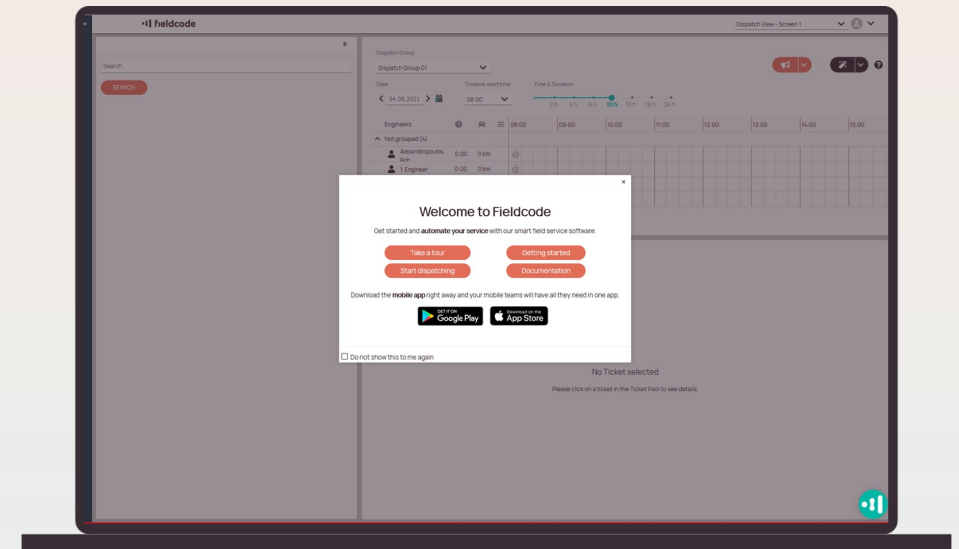
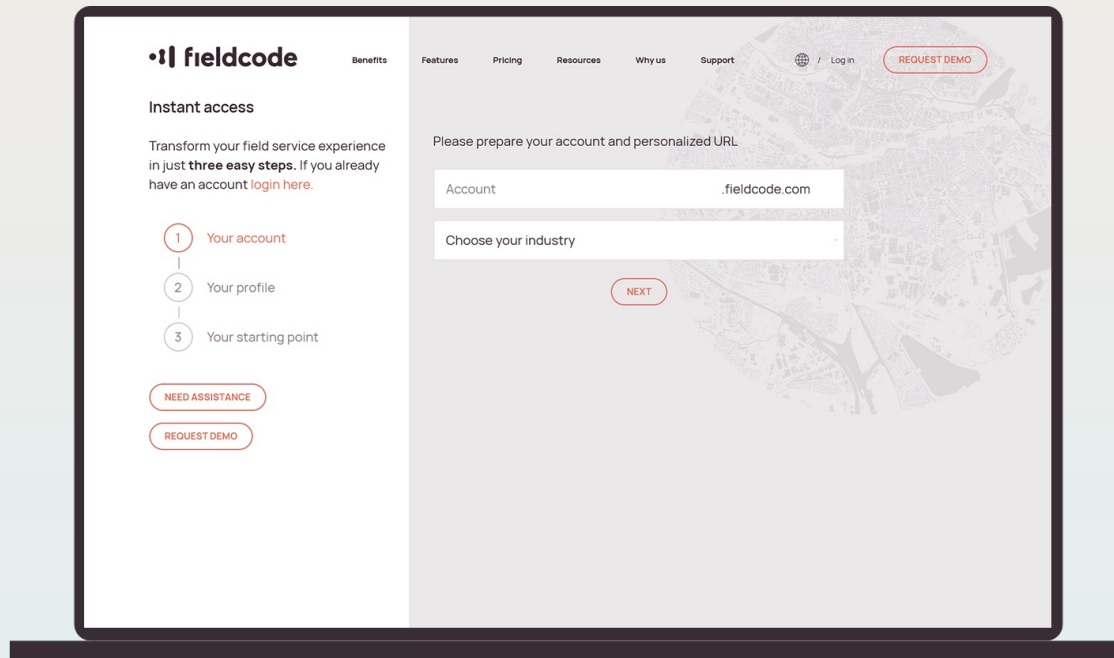
On-demand vs. Subscription - a comparison by example

	Common subscription models	Fieldcode pay-per-event model
Number of users	100	100
Cost per user	\$55	event \$1
Avg. number of events per month	1.400	1.400
Final <u>monthly</u> costs	\$5.500 <small>(number of users x cost per user)</small>	\$1.400 <small>(number of events x cost per event)</small>

Total cost savings with Fieldcode pay-per-event pricing model

74,5%

Would you like to request a personalized demo?



- Get support & guidance through our [personalized demo](#)
- demo@fieldcode.com

Thank you!

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