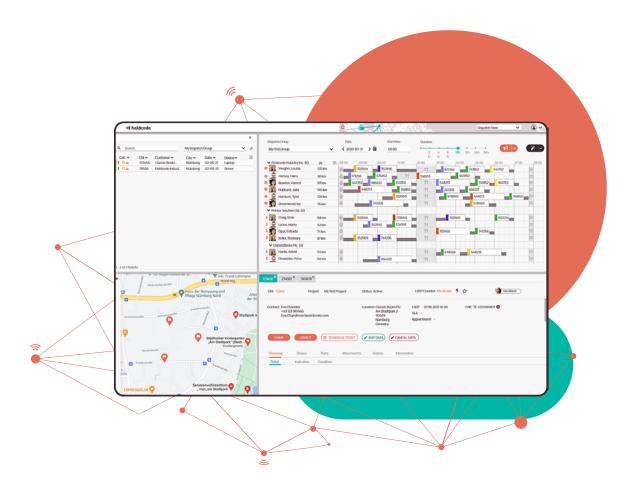# fieldcode

USE CASE

Revolutionizing the HVAC industry with automated Field Service Management software

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Gain control and master your entire service network in one place with the Fieldcode FSM platform. Evolve from a reactive to a proactive service delivery model and optimize your job scheduling on every level.

HVAC business owners and professionals need to prepare for change
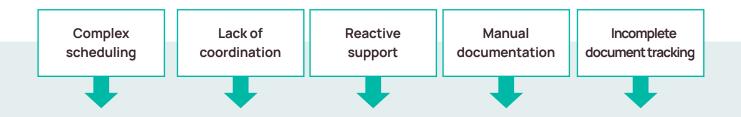

The HVAC sector has endured changes, both pre and post-pandemic. Despite its various challenges, **the HVAC industry is set to explode in size over the next few years**.

Due to booming construction, the shift toward new energy efficiency standards and customers' needs for comfort due to varied climatic conditions make this a demanding and crucial service. **It is imperative that HVAC business owners address present challenges but also ensure critical processes are responsive enough to incorporate growth.**
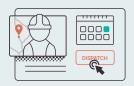
Key challenges faced by the HVAC industry

Managing a successful HVAC business can be incredibly demanding on a macro and micro level. Balancing and tracking a seamless operational flow is complex when dealing with subcontracting partner companies, complying with high industry standards, and responding to a highly competitive industry. Furthermore, crucial business processes tend to lack transparency and communication between the core service network, delivery network, and warehouse network.

HVAC companies with the right FSM software can manage customers, inventory, technicians, subcontractors, suppliers, and various other parts of their operations seamlessly to scale.
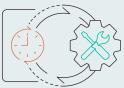
Complex scheduling	Lack of coordination	Reactive support	Manual documentation	Incomplete document tracking

Smart HVAC operations management with advanced FSM software

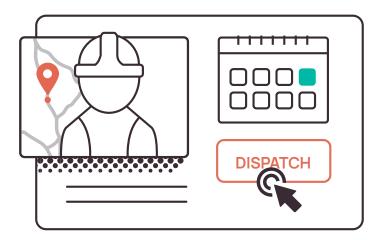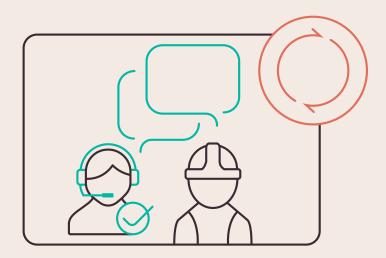| Automated dispatching	Streamlined communication	Proactive services	Process automation	Cloud file storage

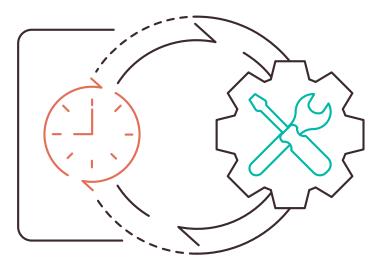# Increase productivity and save time with automated dispatching

- No-touch ticket assignment reduces dispatching efforts by up to 75%, performing work in a fraction of the time and reducing the risk of human error.

- Planned routes are optimized based on mileage, worktime, SLA compliance, and even real-time traffic data. Workforce groups can be dedicated to specific locations to optimize idle resources and meet demands.

- A comprehensive overview of all tickets scheduled provides clarity for all levels of the service network. Projects are kept on time and on budget by easily tracking and adjusting schedules to accommodate any changes. The single view display feature allows an overview of tickets assigned to field service teams, assigned service providers, or their partners enabling transparency across field service teams in real-time and the ability to meet KPIs.

- Scheduling features take into consideration employee competencies to guarantee and assign the right person with the right equipment to the right job, resulting in fewer repeat calls and setting field service personnel up for success.

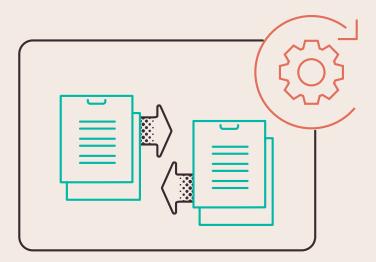# Upscale efficiency through streamlined communications and coordination

- Dispatchers, technicians, partners, customers, even suppliers and vendors are on the same unified platform creating transparency and coordination of the complete field service life cycle.

- All necessary documents, service history, and schedules are easily accessible via a dashboard. Management of equipment, work orders, labor, service parts, warranties, returns, contracts, and project status are all done in real-time.

- Technicians in the field can track work orders, update ticket statuses online and offline and access documentation regarding spare parts or instructions.

- Call-center employees catering to incoming queries save valuable hours and reduce operational costs by keeping customers automatically informed. Customers can raise requests and receive relevant updates via email, SMS, or through a live link.

Proactive services with improved data accuracy and decision-making agility
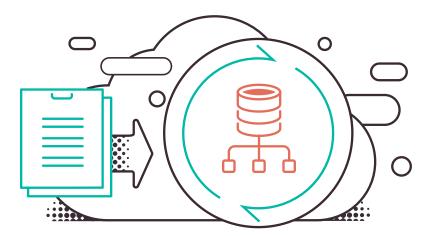

- With real-time data and two-way communication, dispatchers and field teams can react swiftly to changing situations, reorganize priorities, update customers and rectify any field gaps.

- Critical alerts are received ahead of time to ensure projects are compliant with SLAs and safety regulations.

- Real-time inventory tracking in the service supply chain assures optimal parts placement and accurate inventory levels and reduces downtime.

- Seamless customer data tracking provides insights into cross-selling or up-selling opportunities that would not have been possible with paperwork.

Increase accountability and efficiency with electronic document workflow automation

- Technicians feel empowered while on the job with easy access to all related documentation providing individually tailored services. Critical information such as job information, manuals, warranties, and work history are linked to work orders.

- Records are easily kept throughout the processes. Technicians can efficiently work offline and load new data on the server once online. The chances of tasks being missed are significantly reduced.

- All essential documents and tasks completed by who and when are easily tracked making compliance with government regulations easier.

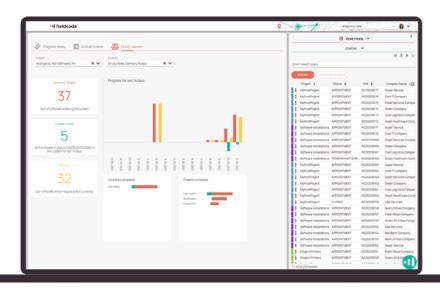# Complete document tracking with cloud file storage

- Digital document management significantly reduces administrative filing costs and avoids lost work orders.

- Document retrieval is faster and more efficient. A centralized storage location minimizes time spent validating reports, eliminates delayed billings, and reclaims lost revenue with accurate invoicing.

- Documents stored in a centralized location promote data accuracy and reduce paperwork and redundant data entries.
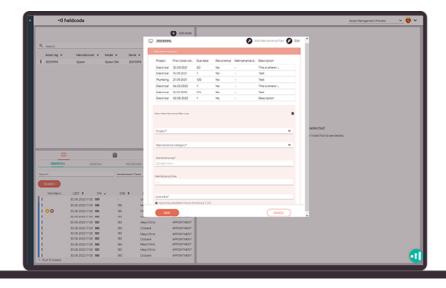
Fieldcode's smart field service management software for the HVAC industry

Benefit from smart scheduling, user-friendly mobile solutions, and robust business intelligence to control, simplify and scale your field service processes.
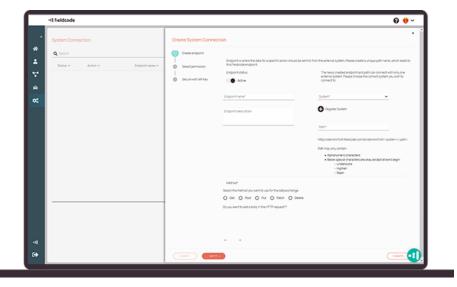
Automating key tasks with Fieldcode

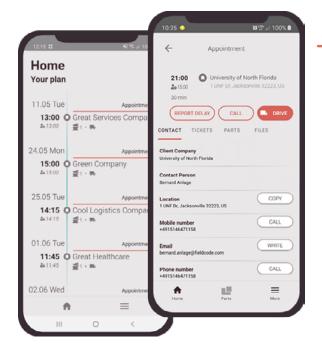→ View **critical tickets**, ticket volume and daily progress via the analytics dashboard.

→ Automate events at specific times to ensure regular **maintenance cycles** on assets are completed.
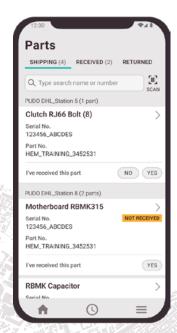
→ **Integrate Fieldcode** into existing CRM or ITSM systems processes.
Tickets are synchronized and continuously updated.

Help your teams on the field to manage activities efficiently with the Fieldcode mobile application
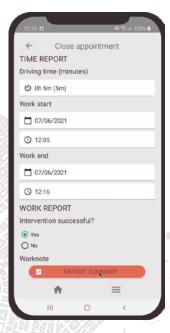

→ The user-friendly interface allows for a structured view of **schedules** and **tasks**.
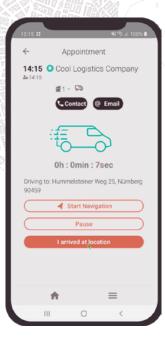
Technicians can view **real-time updates** on task-related information, including schedule details, customer information, history, and communication details.

Easy access to order **status updates** and **documentation** regarding **spare parts**.

Data is entered in the form of a report and **synchronized upon completion**, which **reduces paperwork** and **redundant data entry**.

In-app map integrations allow **direct navigation** to customer locations

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Thanks to the Fieldcode mobile application our engineers' duties are simplified and their efficiency is enhanced

Becky Carr, Account Manager – Climate by Design

Results with Fieldcode

Climate by Design heating and cooling air conditioning systems specialist uses field service management software from Fieldcode to ensure they provide outstanding customer service and significantly improve operations efficiency. Here are just some of the results:

→ **15%**
reduction of maintenance cost

→ Elimination of repeated on-site visits

→ **30%**
increased workforce productivity

fieldcode

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