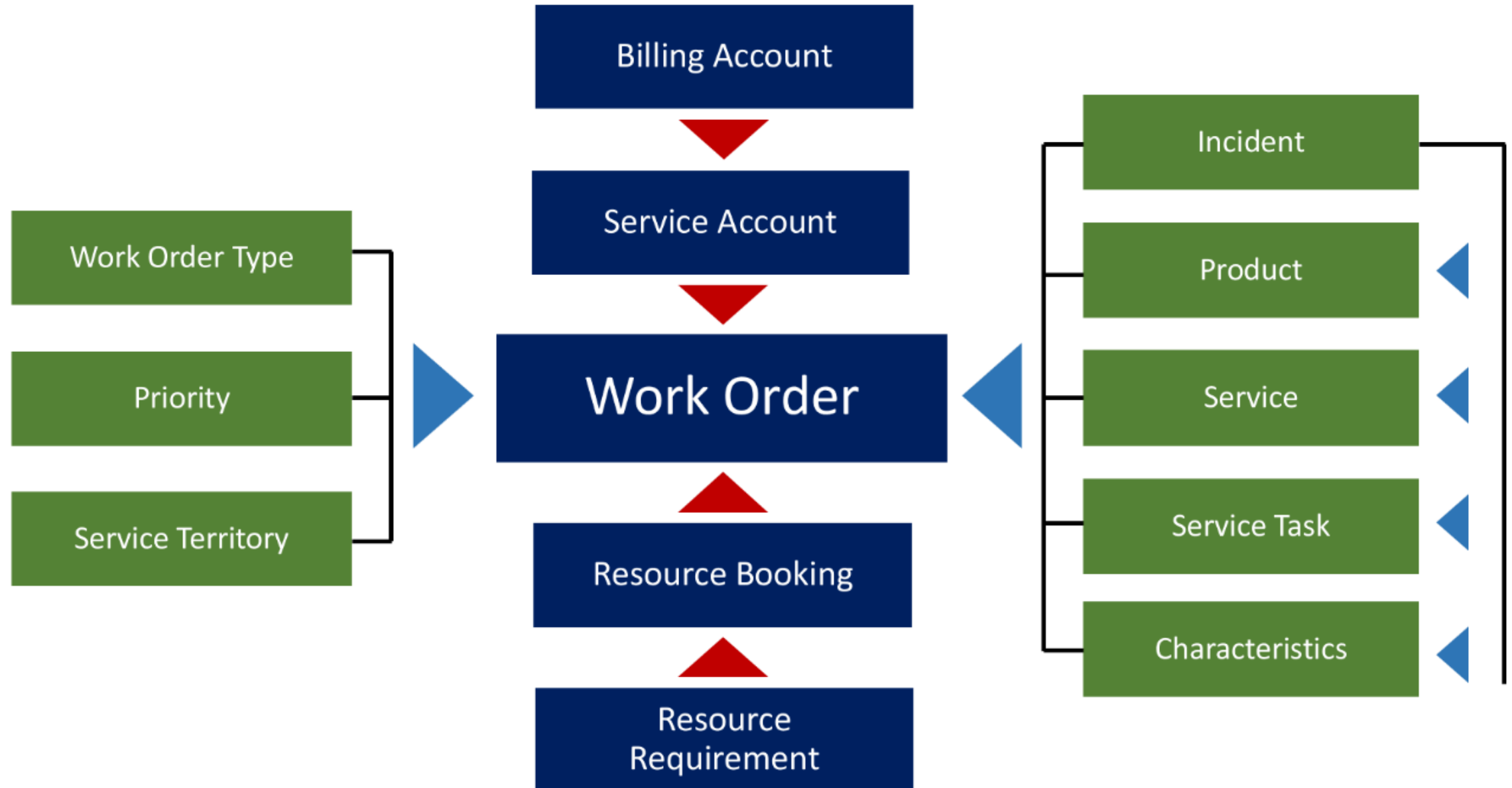


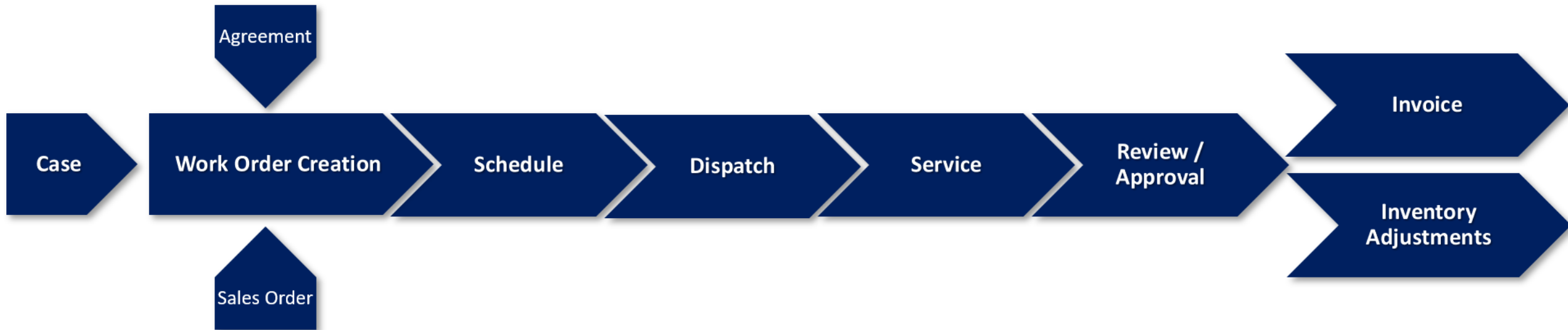
Field Service Lifecycle



Work Order Related Records



Work order lifecycle



Work Order Creation



What Happens

- New work order created
- Assigned incidents, products, services, etc.

How is it created

- Automatically on a recurring basis
- Escalated from a support Case
- From a sales Opportunity
- Manually by field agent, or centralized dispatch

Work Order Status

- Open - unscheduled

Booking Status

- N/A
-

Schedule



What Happens

- Work order schedule created
- Resources assigned to the work order
- Date and time specified

Who Performs

- Dispatcher (manually)
- Field Agent (manually or mobile)
- Dispatcher with help of scheduling assistant
- Automated routing engine

Work Order Status

- Open - scheduled

Booking Status

- Scheduled
-

Dispatch



What Happens

- Field agent notified of work order
- Field agent may review and accept/decline the work order

Who Performs

- Notification sent by system automatically to field agent, customer, and other parties. **Note:** Notifications need to set up in the system.

Work Order Status

- Open – scheduled

Booking Status

- Scheduled
-

Service Delivery



What Happens

- Work order carried out
- Information about what is performed is entered through the mobile app.

Who Performs

- Field Agent

Work Order Status

- Open – In Progress > Open - Completed

Booking Status

- Traveling
 - In Progress Completed
-

Review / Approval



What Happens

- Supervisor verifies that all work was done properly, and all information on the work order is correct.

Who Performs

- Supervisor/Manager
- Back office accounting

Work Order Status

- Open – Completed > Closed-Posted

Booking Status

- Completed
-

Invoicing and Inventory Adjustments



What Happens

- Invoice is created based on products and services used.
- Inventory adjustments made.
- Products converted into equipment. (If applicable)

Who Performs

- Automatically sent by system

Work Order Status

- Closed - Posted

Booking Status

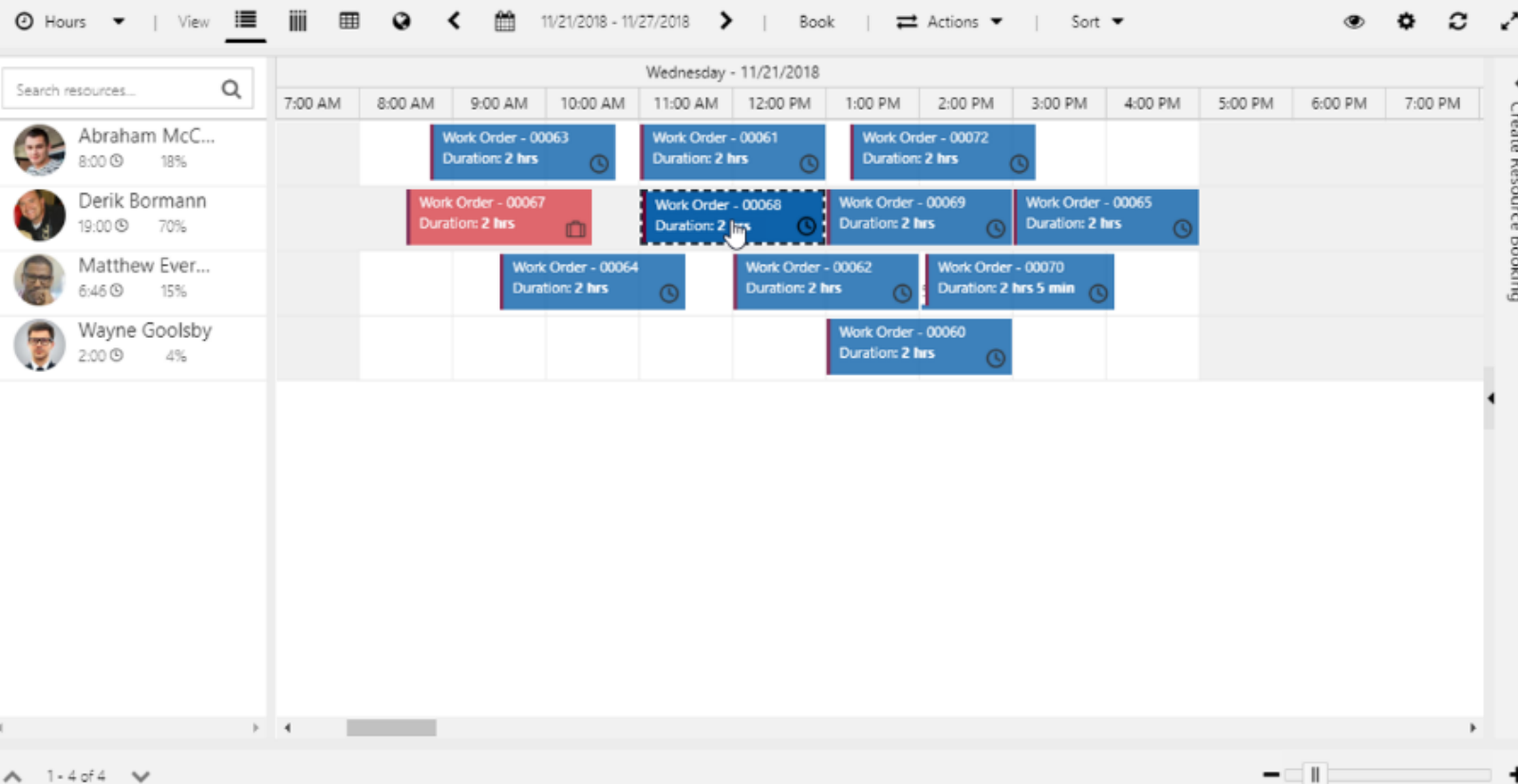
- Completed
-

Hourly view

Schedule Calendar

Resources WA Resources +

Filter & Map View



Details

Details Alerts (0)

Name	Value
Resource	Derik Bormann
Start Time	11/21/2018 11:00 A.
End Time	11/21/2018 1:00 PM
Estimated Arrival ...	11/21/2018 11:00 A.
Estimated Travel ...	0 min
Actual Arrival Time	
Actual Travel Dur...	
Work Order	00068
Work Order Type...	Service Call
Address Name (...)	
Street 1 (Work Or...	1104 S 7th Ave
Street 2 (Work Or...	
Street 3 (Work Or...	
City (Work Order)	Moorhead
Postal Code (Wor...	56563

Filter & Map View Pane

Details Pane

Open Requirements										Unscheduled Work Orders				Search by Requirement Name		
Name	From Date	To Date	Duration	Proposed Duration	Fulfilled Duration	Remaining Duration	Priority	Territory	Time From Promised	Time To Promised	Status	Created On				
00055			2 hrs	0 min	0 min	2 hrs	Moderate	WA	11/21/2018 5:30 PM	11/21/2018 7:00 PM	Active	09/27/2018 3:23 PM				

Resource Requirements.

Filter View

Schedule Assistant Filter

Work Location

Onsite

Available Duration

2 hours

Radius

20

mi

km

Search Start

11/21/2018

12:00 AM

Search End

11/27/2018

11:59 PM

Characteristics - Rating

Building 12 Access

Roles

Territories

Search

Hours

View

11/22/2018 - 11/28/2018

Book

Sort

Search resources...

	Availabi...	Resourc...	Start Ti...	End Time	Travel St...	Require...	Distance	Estimate...
Matthew Everson	Available	Contact	11/22/20...	11/22/20...	11/22/20...	---	9.64 miles	19 min
Matthew Everson	Available	Contact	11/23/20...	11/23/20...	11/23/20...	---	9.64 miles	19 min
Matthew Everson	Available	Contact	11/26/20...	11/26/20...	11/26/20...	---	9.64 miles	19 min
Matthew Everson	Available	Contact	11/27/20...	11/27/20...	11/27/20...	---	9.64 miles	19 min

Create Resource Booking - 00081

Resource

[Matthew Everson](#)

Start

11/22/2018

7:40 AM

End

11/22/2018

10:00 AM

Booking Status

Scheduled

Distance

9.64 miles

Travel Time

20 minutes

Book

Book & Exit

Name

[00081](#)

Proposed Duration

0 min

Territory

[ND](#)

Created On

11/21/2018 11:13 AM

From Date

Fulfilled Duration

0 min

Time From Promised

To Date

Remaining Duration

2 hrs

Time To Promised

Duration

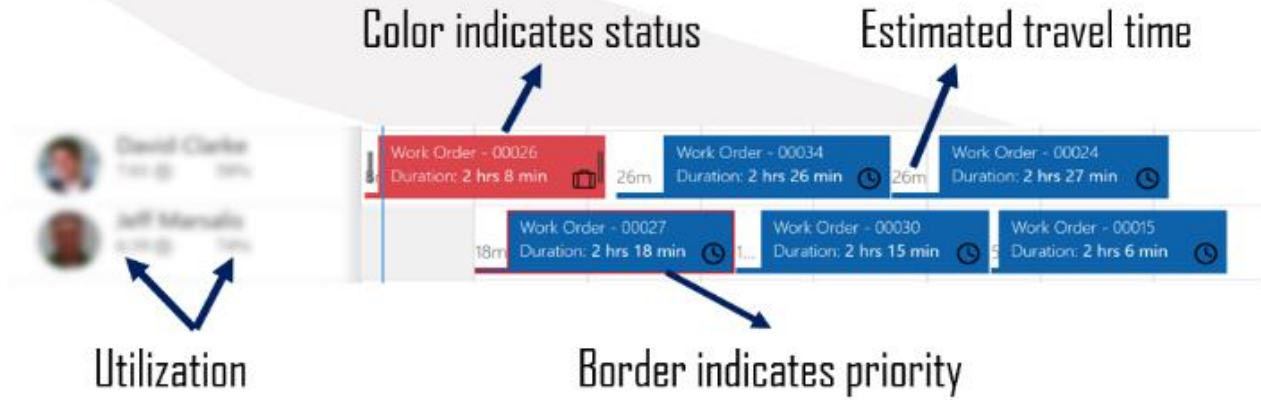
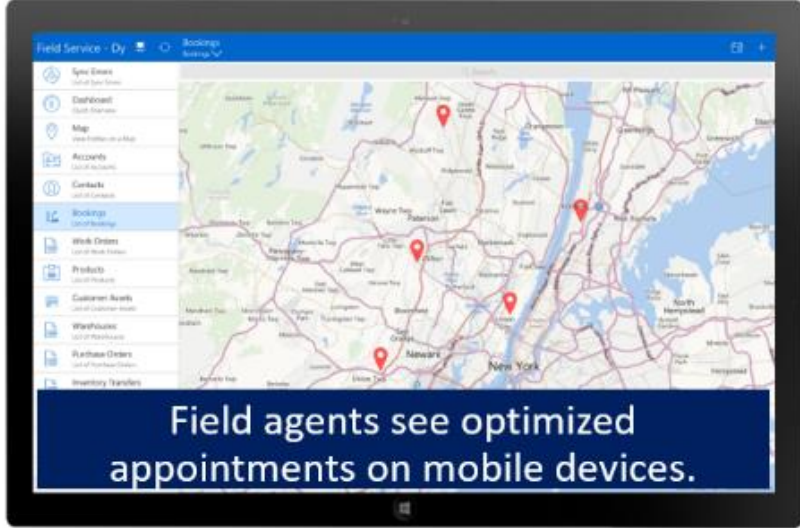
2 hrs

Priority

Status

[Active](#)

0 / 2



Overnight Scheduling Example:

Sunday

Job Name:
*"Next Weeks
Schedule"*

Frequency:
Weekly

What to
Optimize:

Resources:
"Internal Users"

Requirements:
"Unscheduled"
"Ready to Dispatch"

Bookings:
"Scheduled"

Monday

Job Name:
*"Nightly
Schedule"*

Frequency:
M, T, W, & TH

What to
Optimize:

Resources:
"WA Resources"

Requirements:
"WA Territory"
"Ready to Dispatch"

Bookings:
"Scheduled"

Tuesday

Job Name:
*"Nightly
Schedule"*

Frequency:
M, T, W, & TH

What to
Optimize:

Resources:
"WA Resources"

Requirements:
"WA Territory"
"Ready to Dispatch"

Bookings:
"Scheduled"

Wednesday

Job Name:
*"Nightly
Schedule"*

Frequency:
M, T, W, & TH

What to
Optimize:

Resources:
"WA Resources"

Requirements:
"WA Territory"
"Ready to Dispatch"

Bookings:
"Scheduled"

Thursday

Job Name:
*"Nightly
Schedule"*

Frequency:
M, T, W, & TH

What to
Optimize:

Resources:
"WA Resources"

Requirements:
"WA Territory"
"Ready to Dispatch"

Bookings:
"Scheduled"

Friday

No Jobs
Scheduled

Condition-based Scheduling Example:

