

SERVICEMAX

FIELD FX

SCHEDULE & DISPATCH

**ELIMINATE THE  
JOB WHITEBOARD  
ONCE AND FOR  
ALL AUTOMATING  
SCHEDULE &  
DISPATCH**

## AT A GLANCE

Job whiteboards, paper calendars and excel spreadsheets are inefficient ways of managing crew/equipment scheduling. The FX Schedule & Dispatch module provides an electronic dashboard that displays all of the information needed to get the job planned, the crew dispatched and the equipment scheduled in the most efficient and cost-effective manner.

# INTRODUCTION

Managing scheduling via job whiteboards with swim lanes and magnets, paper calendars with sticky notes and excel spreadsheets are cumbersome and inefficient. There are significant (and obvious) limitations to these tools.



### No Reporting

Without a centralized database, it is difficult to see beyond the whiteboard into metrics such as crew/equipment utilization by region by job. This limits a company's ability to maximize resources and plan for the future.



### Limited Access to Data

As companies grow beyond just one office or a few offices, the limited scalability of these types of scheduling tools handicaps a company's growth. If only one location has access to scheduling data, processes become even more laborious and time consuming.



### Single Point of Failure

As with any paper-based or whiteboard-based process, not having a digital backup can be disastrous. The ramifications of a prematurely erased whiteboard can be devastating!



### Manual Process

When these types of processes are manual, they can often lead to the duplicate scheduling of resources, scheduling resources without the requisite certifications and/or skills or the scheduling of unavailable resources.

FX Schedule & Dispatch was created to solve all of these problems- to provide users with the data that they need, when they need it, so that they can focus on servicing their customers in the best way possible.

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**"We were scheduling on paper and we were losing information. We were losing customers because we were forgetting to get to them. We had misinformation. We had chaos."**

Dave Van Dyken, *General Manager- Operations*, Plummers Environmental Services on their scheduling process before deploying FX Schedule & Dispatch.

**FX Schedule & Dispatch module provides users with all of the job-related data needed to schedule only certified and available resources, including personnel and equipment, so that companies have visibility into critical data in order to drive higher utilization and more efficient scheduling.**

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# BENEFIT

FX Schedule & Dispatch was created to solve all of these problems- to provide users with the data that they need, when they need it, so that they can focus on servicing their customers in the best way possible.

## Track Qualifications

FX Schedule & Dispatch allows you to keep track of your employees' qualifications so that you know who meets the particular job requirements while you're scheduling the job. A personnel record can have multiple certifications, training records and qualifications associated with it. Also included are effective dates and projected expiration dates. Expired qualifications are highlighted so that a compliance manager can take the appropriate action to get personnel retrained or recertified. You also have the ability to filter by certification or other specifications for easy scheduling.

## Avoid Duplicate Scheduling

Real-time visibility into what crewmembers and equipment are already scheduled for other jobs helps you to avoid possible overlaps.

## Customizable Views

Dynamic drag-and-drop functionality allows each user to create his/her own personalized view. See information the way you want to see it.

Calendar and Timeline views make it easy to see at a glance, which resources are scheduled at which dates/times. Meanwhile, the Map view is a great tool to see where personnel and equipment are currently scheduled/located.

## Personnel Notification

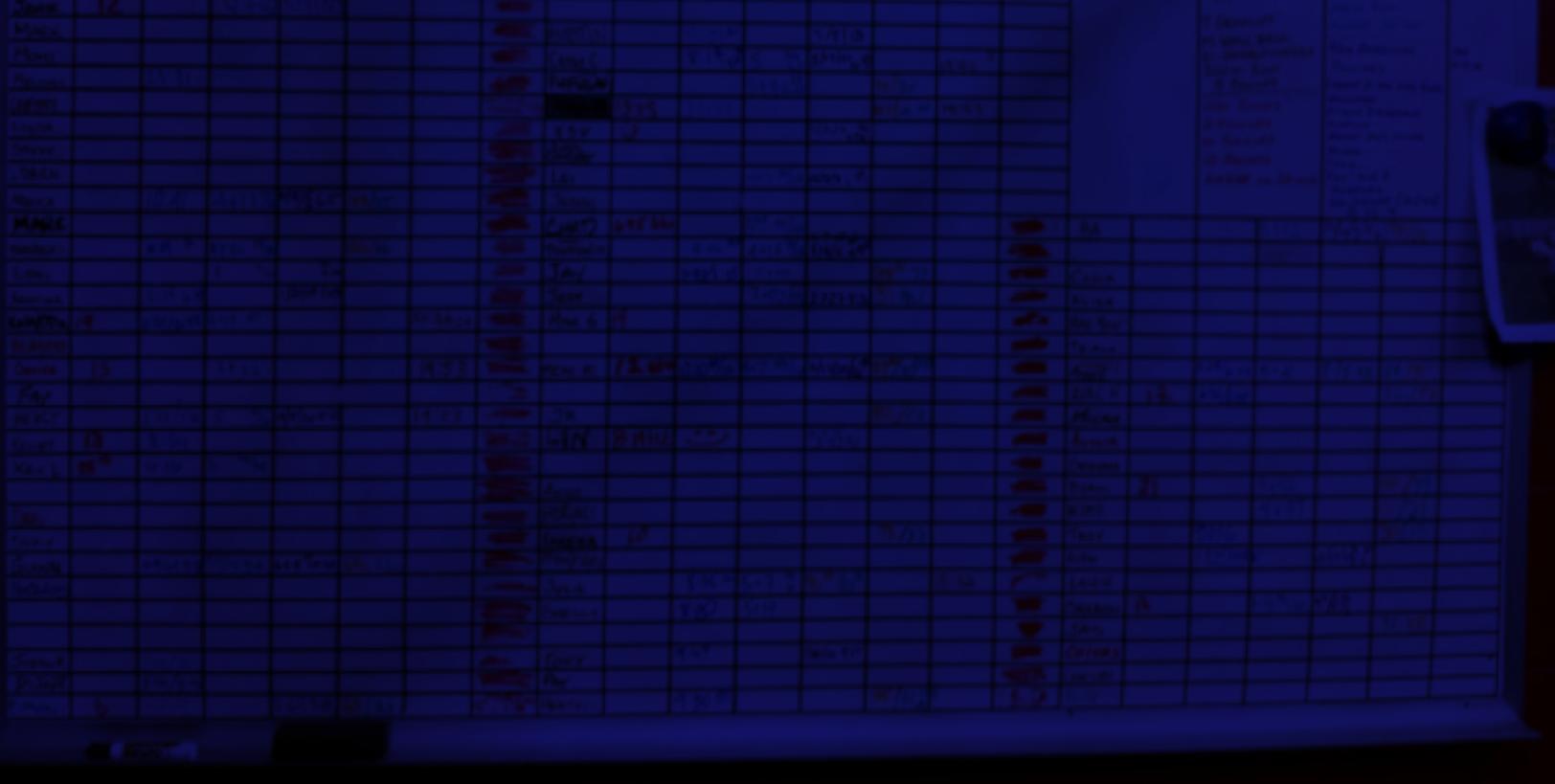
The FieldFX alert engine enables users to set up automatic email and text message notifications to be sent directly to the individual or entire crew, letting them know when and where they are needed. Field personnel are instantly notified on their phone with information related to where the job is and when they need to arrive.

Here are some examples of how you might custom these alerts:

- Job status change
- Notify a sales person when on their jobs has been put on the schedule
- Notify a crew member that he is scheduled for a job
- Notify a crew member when a ticket is marked as "Sent to Field"
- Notify a crew member when a ticket is marked as "Rework Needed"

## Engage More Deeply with Your Customers

In the service industry, convenience and speed are king. From when a job order is placed, through completion of service, every step of the process must be efficient and effective. The first step in this process is the scheduling and dispatching of resources. You need to have the right resources assigned to the right jobs in an efficient manner to start in the best possible manner and provide your customers with the best possible service.



# CLOSING

Eliminating the job whiteboard (and any other antiquated means of scheduling) and moving to an automated system, such as FX Schedule & Dispatch, is sure to help get rid of your “chaos” and drive the highest level of customer satisfaction.

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## Complete Mobile Field Operations Management Solutions

The FieldFX product suite is a complete mobile field operations management solution, providing companies in the oilfield, industrial and environmental services industries with the ability to organize and manage jobs, quotes, field tickets, equipment, contracts, price books and labor along with customer-specific electronic forms.



**SERVICEMAX** | **FIELD FX**

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