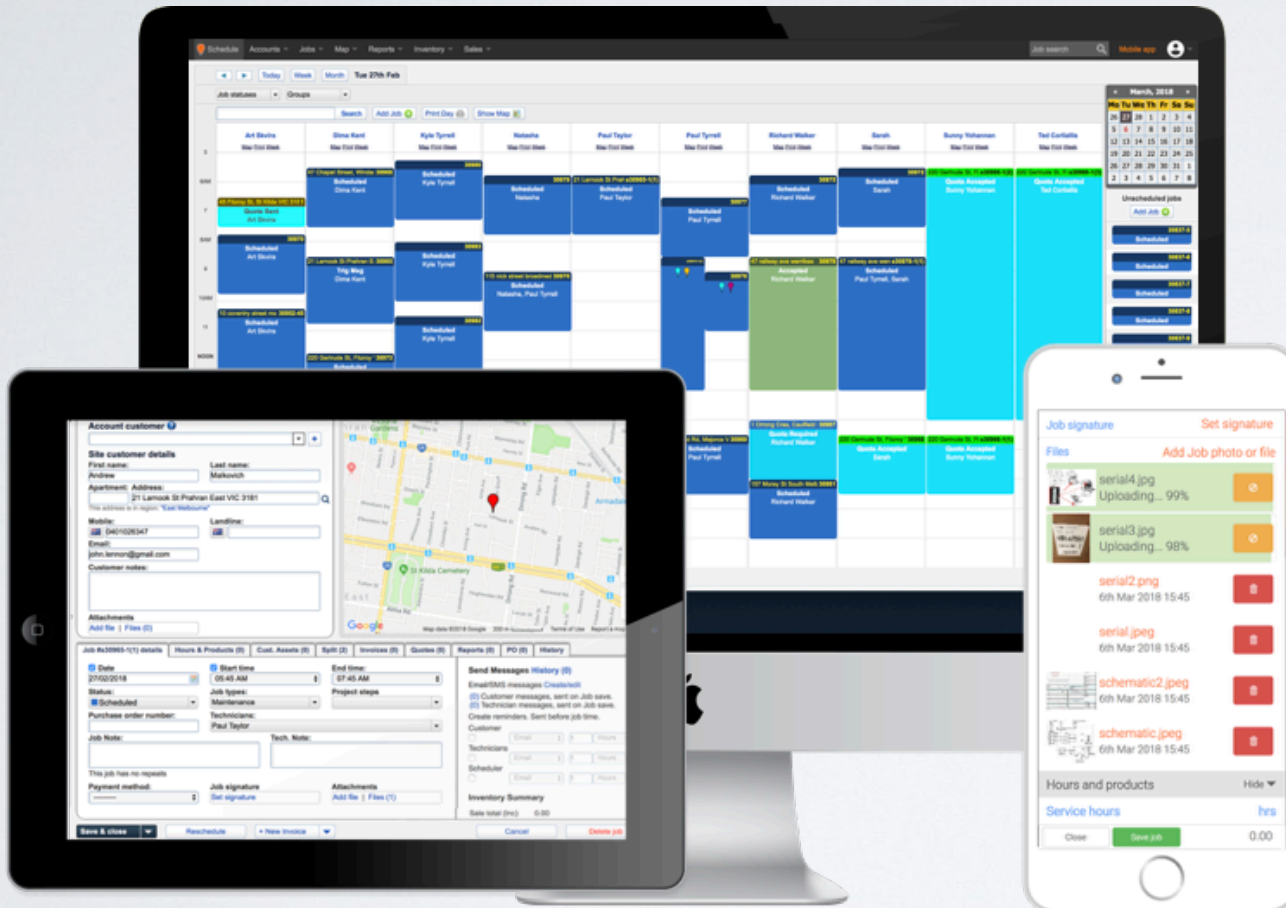# JOB MANAGEMENT SOFTWARE

TRADES BUSINESSES

FieldInsight

www.fieldinsight.com

PROBLEMS FACED
BY TRADES BUSINESSES

Common challenges Trades Businesses Face?

- Scheduling clashes, missed customer commitments
- Double data entry, wasting precious time
- Chasing paper around town - wasting more time
- Missed Information from a Customer Visit, resulting in revisits and follow-up phone calls
- Cashflow shortfalls because of invoicing delays

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HOW CAN THIS IMPACT
A BUSINESS

What are the costs of these problems (for a 10 technician business)?

- Scheduling clashes - 3 jobs delayed a week, 10 hours lost

- Double data entry, wasting precious time, 20 hours a week - Think - safety Assessments, Customer Quotes, Customer Invoices, PO, Tracking profit and loss on a job

- Chasing paper around town, wasting 20 hours a week - Think - time-sheets, service reports, Asset Test Reports,

- Missed Information from a Customer Visits resulting in revisits and phone calls - 5 hours a week

- Cashflow shortfalls due to delays in invoicing - $35,000 cashflow shortfall, that could be brought forward

* ~ **$100,00** to **$300,000** a year.

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Why Streamline a Trades business, what impact can this have?

- Get More jobs done
- Work Faster
- Improve Quality
- Improve Cashflow
- Improve Customer Satisfaction

Small optimisations in processes through software can make huge inroads to efficiencies leading to more profitable business that are growing

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DEMOGRAPHIC

Working closely with

- HVAC
- Plumbers
- Electricians
- Pest Control
- Locksmiths
- 2 to 30 million in revenue
- 5-50 technicians
- Focused in Australia

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SOME STATS

- 10% increase in the number of jobs you can do in a week

- Increase Job Quality with 10% less call backs

- A 15% increase in Customer Happiness

- An 8% reduction in time tech's spent driving

- An extra $28,000 per month from never losing annual service work

* Total Improvement in Revenue for the year for a **5 tech business** ~ **$300,000 a year.**

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SOLUTIONS FOR PEOPLE IN TRADES

The Job Management Software that fits your business like a glove

Scheduling

Amazingly flexible visual and fast.
Call-backs.
Multi Visits.
Split and custom job series.

Assignment

Automatic triggered SMS & Email from workflow, saving 75% of time.

Mapping & GPS Trackers

Use Mobile Phone GPS.
Install a physical 24/7 GPS tracker in the car - very affordable.

Mobile Device Friendly

Android or
iOS iPhone, iPad
Windows
Tablet
Phone
Laptop
Only show the tech what they need to see

Timesheets

Fast timesheet, linked to the job completed + simple timesheet reporting

Asset Management

Add Assets to a Customer.
Build Asset Test reports
-> Calibration, Commissioning.
Multiple Asset Tests on the one report.
Single click
Easy to manage via MobileApp

Integrations

- Xero
- MYOB AccountRight
- eWay (credit card payments)

Project Management

Profit & Loss for Projects
Multi Site management
Performance % Budget Hit
Statement summary

Document Management

Invoicing - Multiple visits on one Invoice.
Quoting - Quote from the field, see Margin immediately.
Payments - Add a Payment to the Invoice.
Collect Credit Cards from the field.
Easy reconciliation in the bank, with the payment showing the actual invoice number

Custom fields

Customise your fields to match industry; Customer, Account, Job, Asset.
Hide or show them based on your preferences; inc Mobile App.
Make fields mandatory or not based on your workflow.

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Most Affordable End to End job management solution in the market place. As researched Jan 2019

5 STEPS TO STREAMLINING A FIELD SERVICE BUSINESS

1 Office

Customer Calls
☎

Customer Calls ↓🕐

Customer new / existing ↑✅

Legend
↓🕐 SAVE TIME

↑✅ IMPROVE QUALITY

↑$ GROW PROFIT

😊 HAPPY CUSTOMER

2 Office

Book Job
📅

Appointment Scheduled ↓🕐

Match Skills & availability ↑✅

See closest tech for job ↓🕐

Address Verified ↑✅

SMS Tech ↓🕐

← Incomplete Jobs

3 Field

Do the Job
🚚

Tech can see directions ↓🕐

Tech Accepts job ↓🕐

Sends ETA to Customer 😊

Job Info Instantly updated ↓🕐

Quality Checklists ↑✅

Job status Completed

4 Office or Field

Do Invoice
🧾

Instantly updated Status ↓🕐

Improved Payment with Signature ↑$

Same day Send Invoice/Quote ↑$

5 Office or Field

Get Paid
💵

Collect Payment ↑$

Update Payment ↑✅

1 click to Book/ Keeping ↓🕐

These all add up to huge revenue loss and opportunity

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PRICING

* Prices exclude GST

New Subscription

- Per Technician monthly charge of $39

- SMS usage (per 160char SMS) $0.13c

- Once-off/Upfront Onboarding fee of $800

- Help/Support is FREE

  Optional Extra's

- Per Physical GPS device; ranging $100 - $150

- Per Physical GPS device monthly charge of $30

Ongoing Services

- Workflow review and configuration is $150

- Training is 1hr increments at $100/hr

- Configuration / Changes to account from $80/hr

Excludes: Integration costs or subscriptions to 3rd party software; ie eWay, QuotientApp, Xero, MYOB

Prices: Current at March 2019

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Request a Demo: try.fieldinsight.com/demo

FieldInsight

TESTIMONIALS

Gary (General Manager)

"This product is the cornerstone of our operation,
I would 'Without Hesitation recommend FieldInsight"

What do you like the most?

- The simple ease of creating jobs, and
- At a glance seeing the status of our jobs in the field.
- Having job information quickly available to respond to client our queries.
- Support from the team is excellent.
- It is good value for money compared to many other products on the market.

Would you recommend FieldInsight?
I would highly recommend this product. It is versatile, scale-able, and
good value. It is the cornerstone of our operation.

What business problems does FieldInsight

- Scheduling
- Reporting,
- Tracking complaints,
- Tracking sales enquiries,
- Proof of delivery, and much more…

FieldInsight

TESTIMONIALS

Laura Hale (Owner)

"FieldInsight has allowed us to be 'Professionally organised'"

What do you like the most?

- We love the fact that we can restrict the ability for users to delete records
- The first is the ease of use and the second is the actual calendar views
- We have 6 sales staff using the schedule to reserve technician appointments interactively.
-

What business problems does FieldInsight

- It enables our sales staff from remote sites to be "**live**" on the calendar.
- This has afforded an organization to our customer scheduling and provided us with a handy means of keeping historical data on jobs.

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TESTIMONIALS

MEALES CONCRETE PUMPING

WA/AUS Based

Great Team, both Paul and Richard are 'Can Do'
Jason Priest (Facilities Manager)

What business problems does FieldInsight solve for you?

1. Scheduling as a whole has been solved.
2. Being an IT professional my recommendation to use a program like FieldInsight to solve a range of problems like;
- historical searching,
- historical data,
- quick communications to staff and customers,
- visual map integrations etc etc .

All the standard items as to why you would bring in a digital solution to replace a manual one.

What do you like the Most?

The customer and technician sms notification aspect.
The team of Paul and Richard, they are fantastic to work with and I've enjoyed getting to know them both. Great can do guys!

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TESTIMONIALS

EPC — ENVIRO PEST CONTROL
Protecting your Environment from Pests

VIC/AUS Based

> I would wholeheartedly recommend FieldInsight to other Business Owners
> Paul(Owner)

What business problems does FieldInsight solve for you?

Providing professional superior services, using FieldInsight has made conducting our business so much simpler and easier whilst having a system above and beyond.
As our company has grown FieldInsight has continued to meet and anticipate our needs.

What do you like the Most?

Our team found it quick to learn and easy to use. My favourite features are the ability for the technicians to send SMS, (or email), to customers when they are on their way to a job, this keeps us up with great customer service.

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