RMB Product Brief —

RMB Field Service App

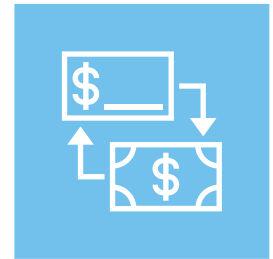For greater profitability from your field service teams

Better Manage
field service operations

Get Real Time Reports
on service progress

Provide Greater Mobility
for field technicians

Reduce Order-to-Cash Cycle
from weeks to minutes

Your field technicians waste valuable time dealing with systems that frequently don't share information efficiently with head office; or, even worse, many work with paper-based processes that are prone to errors and delays.

Planners and managers can't adjust technicians' schedules when unpredictable events occur, such as bad weather, late equipment deliveries or a safety issue on site.

The Field Service app allows you to reduce your field service costs with a light field app for handheld devices that sends real-time work order updates.

Greater mobility for field technicians

The Field Service app is a light interface that field technicians can access via a web browser on a mobile device, be it a tablet, smartphone or notebook.

Repair technicians download work order information and upload their progress to Service Management, all from their handheld devices. No programs to install. No hardware or programs to maintain.

Integration with ERP

Information that is downloaded and uploaded from the Field Service app automatically updates relevant information in the ERP. Work order status and inventory are automatically updated everywhere: in the Field Service app, Planning Board, Service Management and the ERP.

Plan   **Schedule**

**Get
Progress
Report**
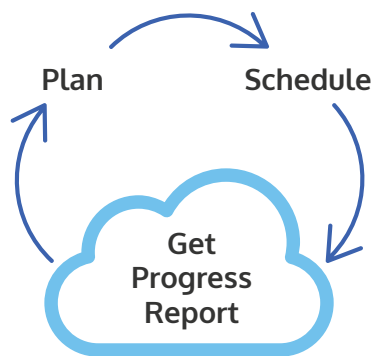
Features

- Compatible with most mobile devices, including Android and iOS, as well as most web browsers, including Safari, Internet Explorer and Chrome

- Secure, cloud-based application, accessible from a website URL

- Can be used offline if internet connection becomes unreliable

- Light technology that streamlines repair and installation workflows

- Fully integrated with RMB Solutions' Service Management, which is tightly integrated with ERP systems

Tools for the field

Providing real-time information that both planners and field technicians need.

Easily enter progress and job status updates.

Tap email address or phone number to automatically open up the appropriate app.

A streamlined workflow shows only the information the technician needs.

The app provides directions to a service site.*

* Requires GPS capabilities on device

Streamlined workflows

The Field Service app was designed to be easy for technicians to use and follow. Pre-built workflows make processes straightforward.

Tap 'Refresh' to see updated work order information from Service Management. Tap 'Save' to upload entered data to Service Management.

See work orders in the order they've been assigned.

Capture and send electronic forms, signatures and photos

Field service technicians can take pictures, capture a signature on a device and email signed forms to the customer, all while standing right in front of them.

Quickly email work order forms directly to the customer.

Customers can sign the work order directly on the device with their finger. When saved, a signed copy is automatically emailed to the customer.

Take pictures and attach them to the work order. Once uploaded, the picture appears in the work order in Service Management.

Mobile inventory tracking and management

Technicians can look up inventory as well as track any equipment that has been swapped out during service.

> Browse a virtual inventory or inventory in the vehicle. Search inventory by name, part ID, or a combination of both.

> Track equipment and component changes by serial number, helping prevent warranty fraud and keep more accurate accounts.

Other features

Customization options. Customize forms to fit your specific processes, such as adding checklists, capturing quality information or other information.
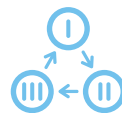
Optimize logistics. The Field Service app can be integrated with logistics software to optimize your logistics planning. It also tracks and reports GPS coordinates, so you can monitor progress on jobs and resources and make adjustments if necessary.

Record hours worked under Labor and any related **travel expenses** under Expenses.

Document issues or other comments under Notes.

Optimized planning and dispatch. The Field Service app is seamlessly integrated with RMB Solutions' Planning Board. The Planning Board lets planners and managers dispatch technicians optimally and get real-time updates from the Field Service app as jobs progress. You can minimize time lost due to bad weather, missing or late equipment or other unforeseen circumstances.

Field Service app benefits

- Greater mobility

- Paperless system

- Enable BYOD (Bring Your Own Device) with cloud-based application

- Download work order information from Service Management to the mobile device

- Seamless integration with RMB Solutions' Planning Board

- No manual re-keying of information; fewer clerical errors

- Shorten order-to-cash cycle

- Lower TCO with cloud-based application

Reduced field service costs

When used in conjunction with Planning Board, an exception-based planning application, the Field Service app has been shown to reduce field service costs significantly.

Best practices in installation, repair and preventive maintenance visits

The Field Service app — one of several apps available for use with Service Management — is based on customer input and over 30 years of experience in service operations. The workflows reflect best practices seen and developed at countless implementations of Service Management, where real-world situations inform practical application.

Field Service app + Planning Board

- Lower field service management costs

- Empower planners and managers with real-time information on field technicians

- Information from the Field Service app automatically updates the Planning Board, issuing alerts when problems arise

- Make proactive decisions, instead of reactive ones

- Make service teams more profitable

For more information

To get a personalized demonstration of how Service Management can help you improve profitability in your service department, contact RMB Solutions at sales@rmbsolutions.net or at 770-643-9284.

RMB Solutions

RMB Solutions is a company whose only focus is developing and delivering industry-leading Service Management solutions. Manufacturers large and small rely on Service Management to streamline their service organizations. For more information, go to www.rmbsolutions.net.

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