Our Introduction to Seamless Integration

Helping you to extend the power of your business solutions in to the field

FieldAware™

Overview

Most organizations use multiple systems within their business but can often struggle to share information effectively across them all. From customer relationship management (CRM) and enterprise resource planning (ERP) solutions to accounting software and more niche technologies, businesses want to invest in the best-fit solution for their needs. But there is concern about the cost, implementation and complexity of how they can integrate any new systems they may need with their existing technology.

When integration between these systems isn't effective, it can mean that systems are used in isolation and data from each one is lost, duplicated or, at worst, simply not reported.

When looking at a field service solution, integration becomes even more crucial as data is coming directly from the field, may need be captured offline and often has to be shared across various systems. An integrated field service solution means that the two-way flow of data and information is captured just once and in a consistent and efficient way. It means that no data is left unused or delayed while waiting on paperwork submissions or for collected information to be downloaded and an audit trail is in place reducing the chance of any lost or missing information.
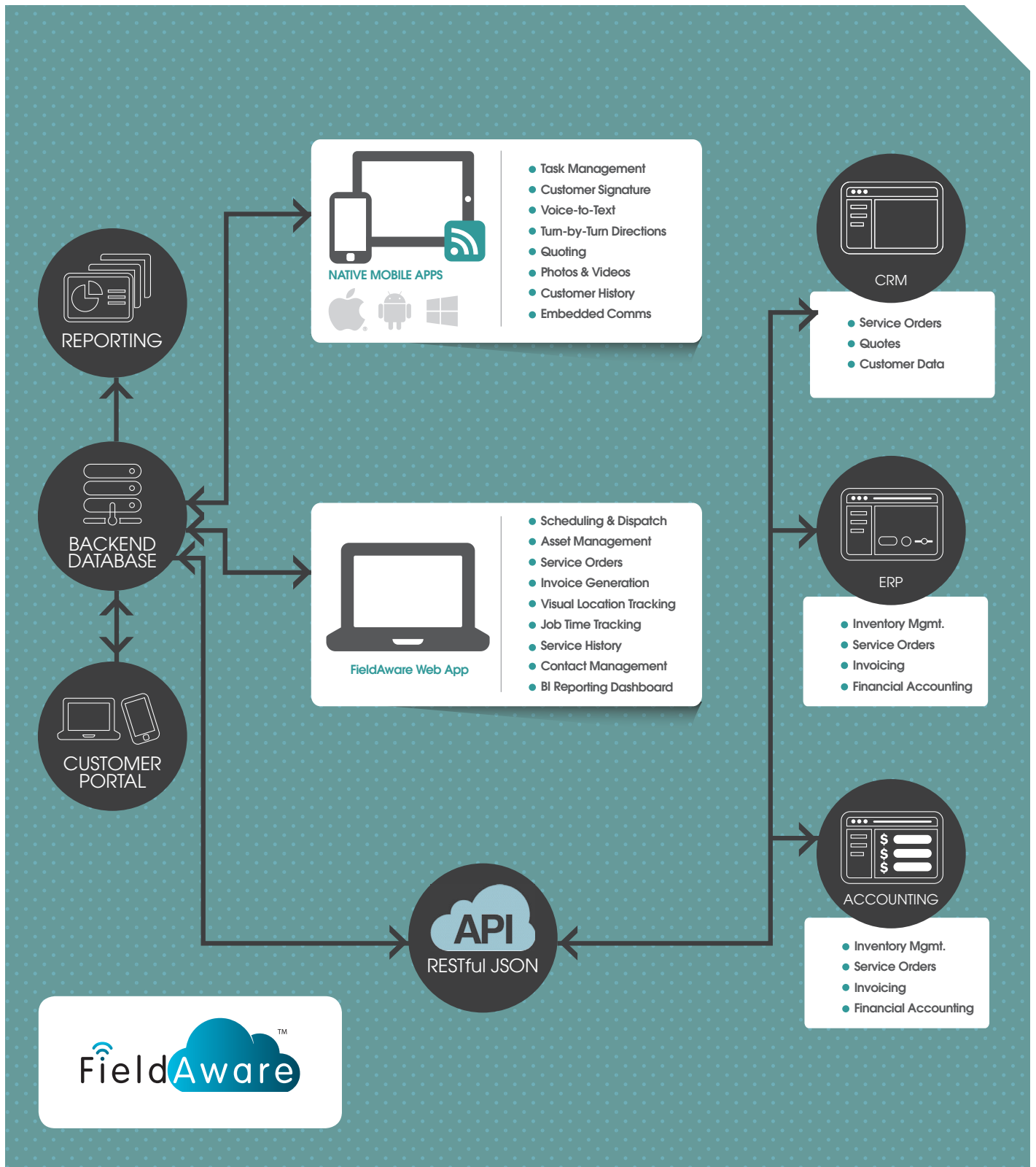
FieldAware is purpose-built to integrate and, once implemented, becomes an enhanced layer on top of your existing systems, extending their power out into the field. You can minimize costs, complexity and time while ensuring your business doesn't standstill.

The Benefits Of FieldAware

- FieldAware was designed and built specifically with integration in mind

- FieldAware is cloud-based reducing investment costs

- FieldAware has an open API which means our solution integrates with any systems you have

- FieldAware lets you share data from your current solutions out in the field

- FieldAware extends the power of your existing solutions – maximizing your investment in them

- FieldAware connects your entire business from the field to the office

- FieldAware's seamless integration means a faster implementation

- FieldAware is easy to use which means quicker adoption and utilization

- FieldAware is based on mobile and web technologies, minimizing hardware investment

- FieldAware's flexibility means upgrades and customizations can be made quickly and effectively as your business needs change

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FieldAware Architecture

REPORTING

BACKEND DATABASE

CUSTOMER PORTAL

NATIVE MOBILE APPS

- Task Management
- Customer Signature
- Voice-to-Text
- Turn-by-Turn Directions
- Quoting
- Photos & Videos
- Customer History
- Embedded Comms

FieldAware Web App

- Scheduling & Dispatch
- Asset Management
- Service Orders
- Invoice Generation
- Visual Location Tracking
- Job Time Tracking
- Service History
- Contact Management
- BI Reporting Dashboard

CRM

- Service Orders
- Quotes
- Customer Data

ERP

- Inventory Mgmt.
- Service Orders
- Invoicing
- Financial Accounting

ACCOUNTING

- Inventory Mgmt.
- Service Orders
- Invoicing
- Financial Accounting

API RESTful JSON

FieldAware™

Who We Integrate With

ERP Integration

Organizations use ERP (Enterprise Resource Planning) software to manage many and varied business functions and processes. These include supply chain, procurement, inventory, finance, human resources and business intelligence. These are all fundamental to how a business operates, but it is the exchange of data into field service management solutions which addresses the specific needs of the service operations, so ERP cannot be relied on to provide optimization of resources alone.

Many of our customers find that the integration of FieldAware with their ERP software is essential to provide a connected operation.

An Example of ERP Integration

NetSuite is a leading ERP provider and FieldAware for NetSuite is a made-for-mobile field service management solution for NetSuite customers with a focus on simplicity, ease of use and flexibility. FieldAware for NetSuite enables quick adoption and is easily tailored to individual business needs.

FieldAware for NetSuite extends your company's investment in NetSuite with a powerful partnership to better manage your service operation. We transact tens of thousands of jobs per month for our NetSuite joint customers and we offer a proven solution that will change the way your field operation does business.

If you work in an industry where you have teams in the field closing out work or performing service, preventative maintenance or repair jobs, running an efficient, connected business is core to your success and bottom line.

With FieldAware for NetSuite you can:

- Maintain seamless real time workflows between NetSuite and FieldAware

- Schedule and dispatch work orders straight from NetSuite

- Dynamically assign crews with matched skills and create timeslots for long duration jobs

- View complete job and field worker status anytime, anywhere

- View NetSuite customer, location, job and asset details on the FieldAware Mobile app

- Collect photos, capture customer signatures and show parts used on a mobile device

- Experience an intuitive interface, offline functionality and use across iOS, Android and Windows phones and tablets

CRM Integration

It may be that a company relies on its CRM (Customer Relationship Management) solution in order to optimize resources and therefore boost productivity. Yet without integration to field service solutions to schedule and dispatch jobs and manage performance the information being captured and acted on is only part of the story.

Through integration with CRMs, the field worker has access to the job history and customer records allowing for a more detailed understanding of not only the task at hand but also what has happened before and why. Knowledge of the different elements of the task are often fundamental in the delivery of service excellence and turning up to site with this information at hand or having access to it, delivers an improved customer experience.

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An Example of CRM Integration

FieldAware integrates with leading CRM provider, Salesforce and sits on the Salesforce App Exchange making integration swift and easy.

Using FieldAware for Salesforce you can share and update customer information from the office to the field and then capture job information, then sync directly back to Salesforce via the mobile app.

FieldAware can even capture pre- and post-work signatures from a mobile device. By using the technology that your mobile workers are using today, FieldAware eliminates paperwork and errors that are common at service oriented companies.

FieldAware for Salesforce can help your company:

- Create jobs directly from Salesforce and feed to FieldAware

- Associate work orders with accounts, opportunities, and cases

- Sync customer data, line items, tasks, pictures, and invoices back to Salesforce from the field

- Map custom fields between Salesforce and FieldAware to completely tailor to your workflow

Accounting Integration

Businesses utilizing accounting solutions want to ensure they can share financial information and also input accurate date to streamline their accounting and invoicing processes. Accounting systems are often utilized to draw essential business information, audit the company and assess an organizations' health so it is important that

human error is minimized. By integrating accounting with other business systems, the data flow in and out can be immediate and consistent while not relying on someone having to manually enter the data.

Processes can be automated so that a work order, for example, can be issued, then on job completion the customer can be invoiced immediately, achieving a quicker payment cycle through this order to cash automation.

An Example of Accounting Integration

QuickBooks has everything you need to manage your business accounts more effectively. By integrating FieldAware with QuickBooks, invoices can be sent from FieldAware directly into your accounting system with one click, significantly reducing days sales outstanding. No more manual entry of data.

FieldAware has a proven integration wth Quickbooks allowing businesses to connect their finance and accounting with their field service.

Using FieldAware with Quickbooks you can:

- Invoice immediately after the job

- Sync job information to Quickbooks

- Avoid manual entry

- Speed up order to cash

- Increase data accuracy

FieldAware integrates with your existing accounting system like Quickbooks to ensure all data is taken into consideration for job allocations and metrics generation.

Taking Advantage of an Open API Architecture

FieldAware was designed and built with integration in mind and offers an open-API (application programming interface) architecture. An open-API means that different systems can talk to each other, without any need for complicated workarounds or high development costs. It allows for easy customization so you can choose what information flows between two solutions and can be used to connect FieldAware to almost any existing technology.

FieldAware's API is based on mainstream web technologies and is built on the LAMP stack, which is composed entirely of open-source software. The LAMP stack is designed for building high-availability, heavy-duty dynamic web services and is capable of serving tens of thousands of requests simultaneously.

FieldAware's API is based on a RESTful (Representational State Transfer) architecture, which is the standard for web-based APIs. The RESTful architecture is built for networked applications and decouples client and server technologies. It relies on a stateless, client-server, cacheable communications protocol – HTTP – the standard web protocol.

Our API can help companies successfully integrate their existing business systems with our made-for-mobile, cloud-based field service.

For further information on our APIs and the web technologies, LAMP stack and RESTful architecture please see our FieldAware APIs information guide.

Implementation

The implementation of any new solution needs to be as quick and straightforward as possible. A lengthy implementation process can feel like it is defeating the objective of achieving a faster, more streamlined workflow. So being up and running as soon as possible should be the goal so you can meet the business objectives and deliver a much faster ROI.

Most companies have suffered with unrealistic promises of technology implementation timelines, that then turn in to a multiple-year project with escalating costs. A benefit of FieldAware is it is much quicker to deploy as it is straightforward to integrate, implement and we have proven experience in getting businesses FieldAware-ready swiftly. Being up and running in a short timescale is critical to not only the smooth running of the workflow but also to getting the benefits that impact your bottom line straight away, not losing time and money with a long implementation phase.

Having solutions which are quick to update and roll-out will mean the business doesn't stand still waiting for their technology implementation to catch up with their operation.

Implementation Best Practice

Where you have specific solutions already in place, FieldAware works with implementation partners to achieve the best outcome for you to be up and running. We also give support so that the FieldAware implementation team can provide user training to ensure you get the most out of your FieldAware solution. Based on our best practice implementation we can assist organizations to get the maximum benefits from productivity, revenue generation and back office efficiency.

Whether you need us to help with system configuration, move your customer data or visit your business on site, we have an implementation process that will make the move to FieldAware seamless.

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Choosing the right solution for your business

From working with a range of companies in different industries, we've found that whatever type of field service organization you manage there are some simple principals to follow -

- Ease of integration is key. There is no need to upgrade the entire end-to-end solution to simply allow better workflow to and from the field. There will have been significant investment into existing systems, which may be highly complex and often bespoke. Extending the life of these systems is important, so layering the simplicity of field service over the complexity of the existing solutions will help to leverage their use.

- Implementation needs to be straightforward and managed to a timescale that means you can be using the solution as soon as possible. You should ensure you map the solution to your workflows so once up and running, it fits seamlessly in to your day-to-day business.

- Any solution should be easy to use. Complicated systems will take longer for workers to adopt, may be bypassed and worked around. How quickly your technicians take to the solution will again affect the ROI.

- All software needs to be agile and able to move with the next generation. Solutions which are quick to update and roll-out will mean the business isn't impacted by a time lag. Developments are moving fast and your vendor needs to keep pace.

Whether you are developing your field service strategy or starting out at the beginning, looking for the right solution for your business that gives you both the features you need and is simple and quick to deploy will see you succeed. Your organization and people will adopt new technology far better if it works alongside the technologies and processes they currently use.

Even if you are not 100% sure of your field service technology needs today, with an easy to integrate solution you are able to future-proof your requirements because of the flexibility it can bring. Upgrades, changes and adaptions can all be quickly and effectively made as your business needs change and develop.

FieldAware simplifies field service management.

The seamless integration of our field service solutions, speed of implementation and ease of use will mean you are up and running immediately, so your business doesn't standstill.

What Our Customers Say

We chose FieldAware because it's customizable, reliable and mobile. It supports the two thirds of our employees who are out in the field using smartphones"

We had a 23% increase in revenue after implementing FieldAware"

FieldAware is a very simple app for engineers and at the same time, it gives me a huge array of complex information"

Time required to close a job decreased from forty-five minutes per job to five minutes"

Schedulable hours increased by 17%"

Our paper work orders are virtually gone, the office staff is happy, and the field techs are generating about 15% more business than last year in roughly the same amount of time"

We were up and running in 5 days, and have seen our overall revenue increase by 15%"FieldAware has allowed us to take our 5000 customers and easily navigate service calls to send to our crew."

Our cash flow has also improved because we now invoice from the field."

Easy to use, Good return on investment and Great Customer Service! When I contact Service they are always polite and skilled in answering my questions quickly and efficiently."

We love how FieldAware connects our office and field techs. We have the ability to send them their schedules without them driving to the office. The fact that FieldAware is continually updating is wonderful and the Support Team is excellent. We have decreased paperwork, we can attach relevant documents for jobs and it helps to keep us organized."

The FieldAware Mobile App saves time and energy. We get before and after pictures of current projects. Our designers can also quickly see where a project is in it's current process".

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To learn more about our solutions or to schedule a demo:

Call us on

US and Canada	**800-935-0736**
UK	**0800 098 8487**
Australia, APAC	**1800 821 628**

Email us at **sales@fieldaware.com**
Visit **www.fieldaware.com**

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About
FieldAware

FieldAware are re-shaping the field service industry. Our made-for mobile, cloud-based software was designed from the ground up to provide ease of use with incredible flexibility. This combination enables field service organizations to enable their field teams and deliver customer service excellence. Our software was architected as a mobile platform, with no incumbent legacy technologies.

Based on our founders' intimate knowledge of the unique needs of engineers and technicians in the field – and the operational personnel and management that support them – FieldAware is focused on providing field service organizations, both large and small, with:

- **Intelligence about your Customers:** So you can increase revenue, expand into new markets, differentiate your services and create customer advocates.

- **Intelligence about your Business:** That enables you to increase the productivity of your staff, use company resources more efficiently, simplify your business processes and "right size" your parts and repair inventory.

We combine our software with the industry's best implementation, on-boarding and support services enabling companies to take full and rapid advantage of today's mobile environment.

To learn more about our solutions or to schedule a demo:

US and Canada **800-935-0736**
UK **0800 098 8487**
Australia, APAC **1800 821 628**

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