



FIELDMAGIC

MAINTENANCE | FIRE SAFETY | HVAC | ELECTRICAL |
SECURITY | IT & ONSITE SUPPORT

A Complete Solution Overview



Job Management Made Easy

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About

Fieldmagic is the most complete Field Services software platform available on the market today. The platform combines a leading CRM with a complete field services solution and aims to eliminate paper-based processes and reduce overheads, placing a strong focus on improving operational efficiency and customer service.



It's about the right workflow.

Built in partnership with industry

Fieldmagic has been built in close partnership with industry, taking into account leading best practices and feedback from our amazing customers. The platform continues to evolve, incorporating new capabilities aiming at delivering real benefits, not features and functions.



Our Awards

Fieldmagic has been recognised as an ABA100 Winner for the categories of Service Innovation and CRM Innovation in The Australia Business Awards 2017. Now in its twelfth year, the ABA awards aim to identify Australia's business, innovation, and technology leaders via a set of established award categories.





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Chapter One

Fieldmagic CRM

Powered by a leading enterprise platform for Sales, Service and Marketing.



Lead Management

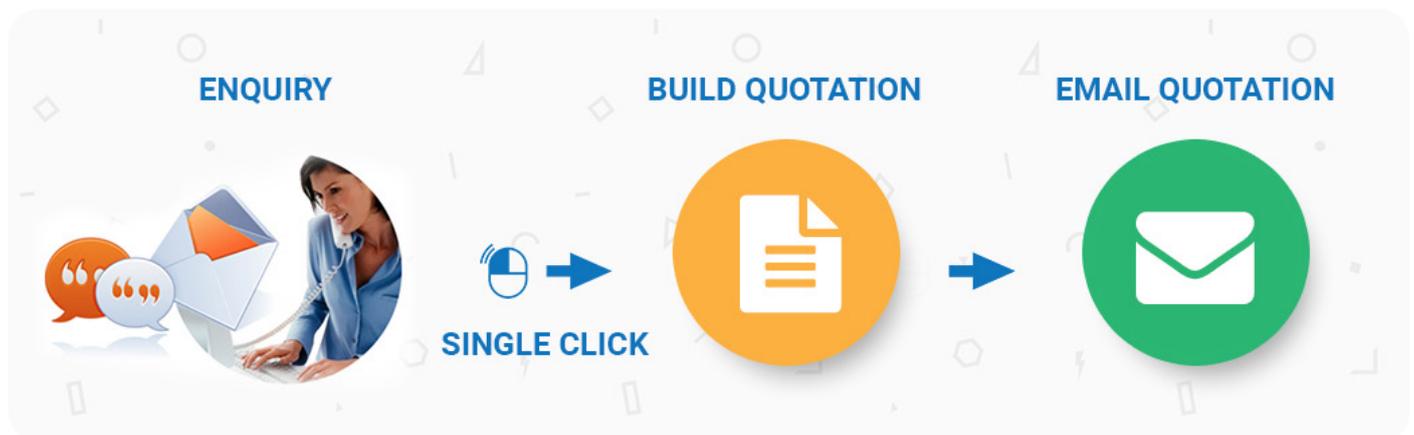
Capture leads directly from your website, walk-ins or via phone with Fieldmagic's end-to-end lead management module. Filter, search and preview key information in a matter of clicks to save valuable time.

Activity Management

Track phone conversations, log notes, meetings and set tasks for followup with full activity management.

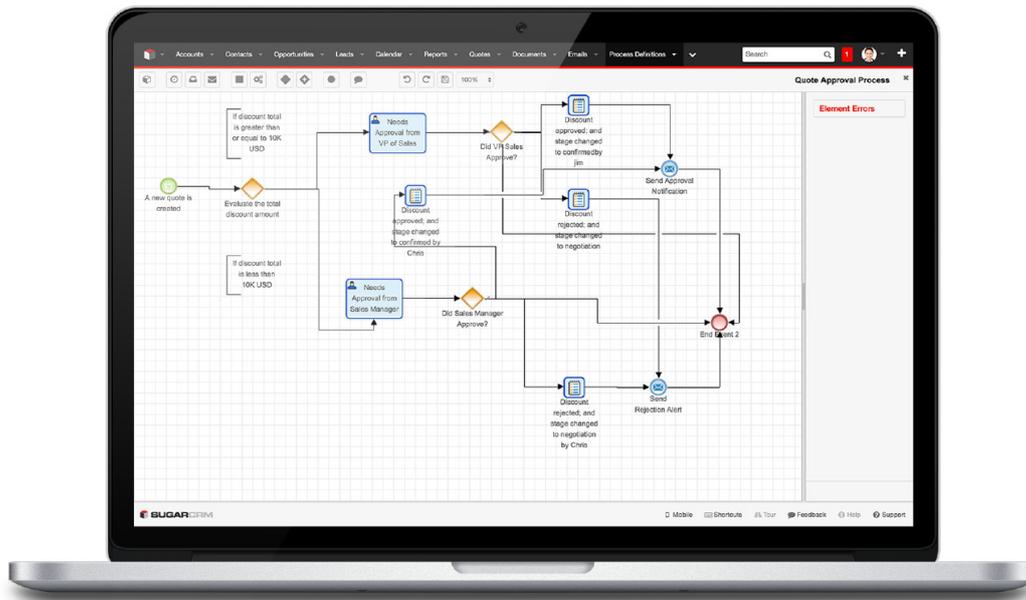
Fieldmagic CPQ Quoting

Fieldmagic's CPQ Quoting module has been built from the ground up specifically for field service organisations. Add parts, labour, group your quote sections and add cover letters to convey your organisations unique capabilities and experience. There is also the ability to automatically include data sheets which will append to your quote to further convey a more polished, comprehensive quote.



Advanced Workflow Engine

Fieldmagic comes with a market leading Workflow Automation Engine built in, and unlike most Field Service Solutions on the market today, Fieldmagic provides a visual process mapping environment that allows you to automate a number of processes in the system to save you time and provide you with timely alerts.



Outlook and Gmail Email Integration

Out-of-the-box integration with Outlook and Gmail means you can centralise your key communications within Fieldmagic so everyone can benefit from insights into the conversations they need to know about.





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Chapter Two

Fieldmagic Scheduling

Optimise your operations with end-to-end scheduling that will save your team hours each week.



Drag-and-drop Scheduling Calendar

The drag-and-drop calendar in Fieldmagic provides an easy and intuitive means of scheduling jobs. With job previews, colour-coding and configurable time periods, you'll always have the flexibility you need to schedule your jobs.

Reactive Job Scheduling

Fieldmagic supports the ability to create ad-hoc simple jobs for reactive maintenance, with the ability to set jobs as either fixed price or time and materials. Include job service notes and mandatory checklists to fill out to add rigour around your job management process. Customers can also create jobs from the Fieldmagic Customer Portal.

Preventative Maintenance Scheduling

Fieldmagic provides a complete end-to-end preventative maintenance workflow allowing you to go from quotes directly to scheduling maintenance, with the ability to update schedules of maintenance against sites.

Multi-Resource Scheduling

Multi-resources scheduling allows you to assign multiple technicians to a single job, build crews and assign a job to a crew, create an equipment list and schedule equipment to jobs.

Chapter Three

Fieldmagic Mobile App

Equip your field technicians with a fast and intuitive mobile solution that will support their natural workflows. Built for iOS and Android.

My Schedule

My Schedule is a full calendar view technicians can use to access a calendar of their scheduled jobs in a day view, week view and month view as well as being able to request leave.

Access Open Jobs and Create New Jobs

Directly from the main menu technicians can access their open jobs, and when required, create new jobs on-the-go.

Navigation

Fieldmagic stores the precise location of each site using address pre-filling so you always find the right location. Navigating leverages your phone's built in mapping apps, and gives your technicians the option of which app they'd like to use to navigate to their job.

Log Time and Materials

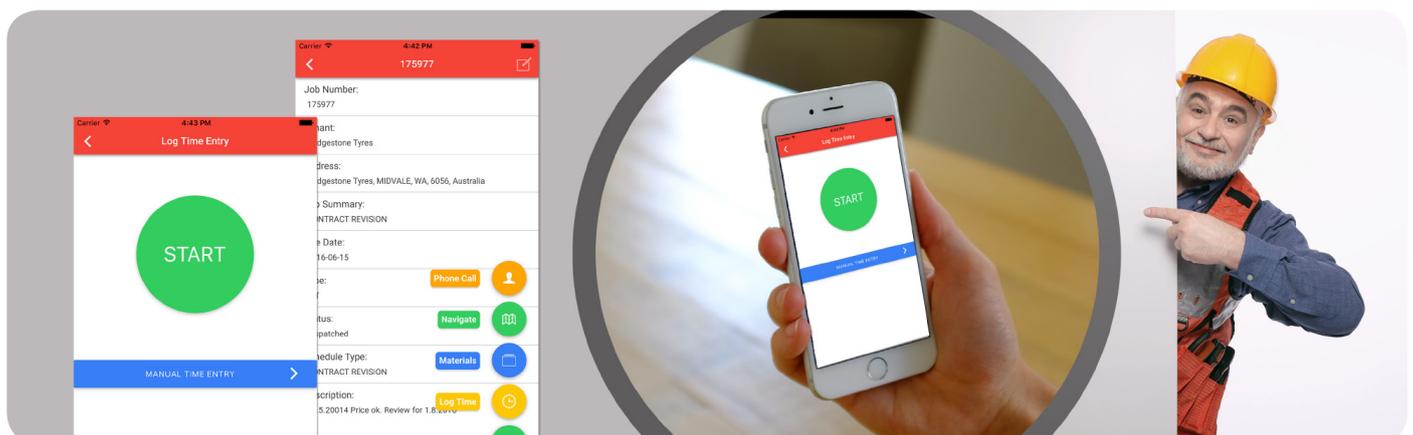
With a built-in start/stop timer fieldmagic allows you to run a job timer and even capture travel time with support for capturing multiple time entries per job. There is also the option of using the manual time entry provided.

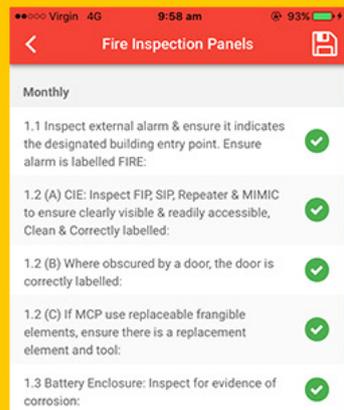
Adding materials to your job is also incredible easy, with full access to your product catalogue whether online or offline.

Accessing Checklists and Servicing Assets

When in a preventative maintenance job technicians have access to their 'Manage Checklists' area where they can view the various Asset Types to be serviced on the job along with the individual assets to be serviced broken down by serial number, level and location.

Fieldmagic also allows for the capture of unique asset-specific attributes relevant to the servicing of your assets. Example might include recording the temperature readings of assets, brand types, mounting types, pressure readings and a range of any values required.





Creating Asset Entries in the Field

Fieldmagic enables the creation of assets in a number of ways:

- QR & Bar Code scanning
- Manual entry of serial numbers
- Adding an asset off an existing open preventative maintenance jobs

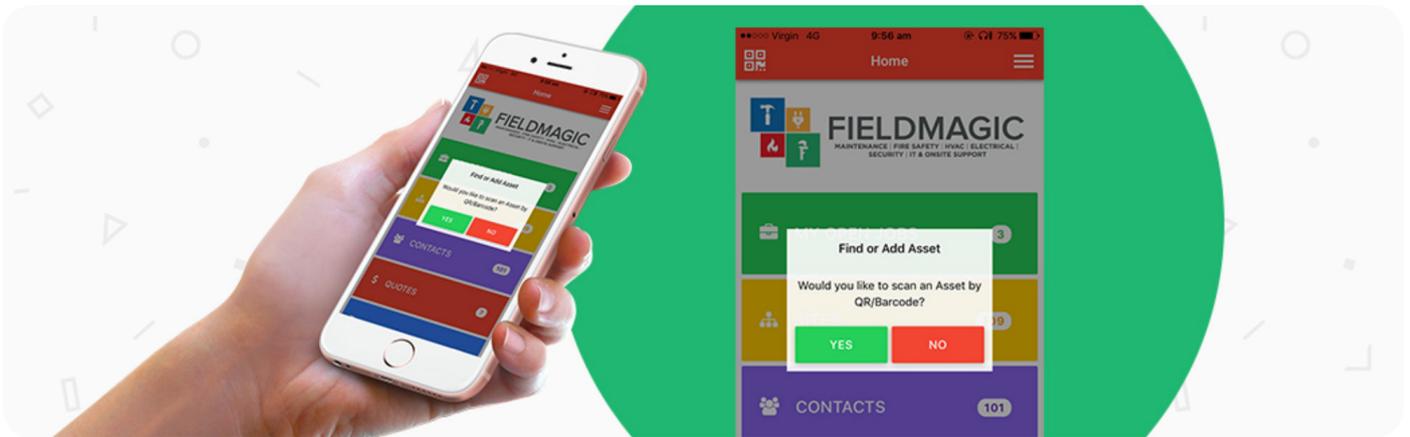


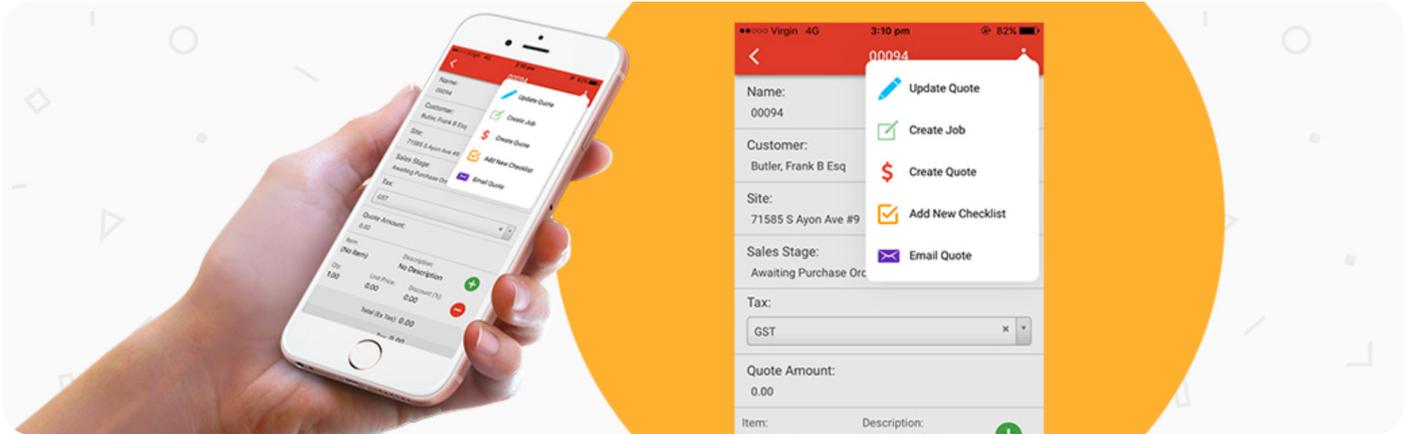
Image Capture

Images can be captured as part of both reactive jobs and preventative jobs with the ability to define types of images and image labels.



Access Open Quotes and Create New Quotes

Field crew that have mobile quoting enabled on their devices can both access open quotes and create new quotes from the app when out in the field. Quoting is only supported when online.



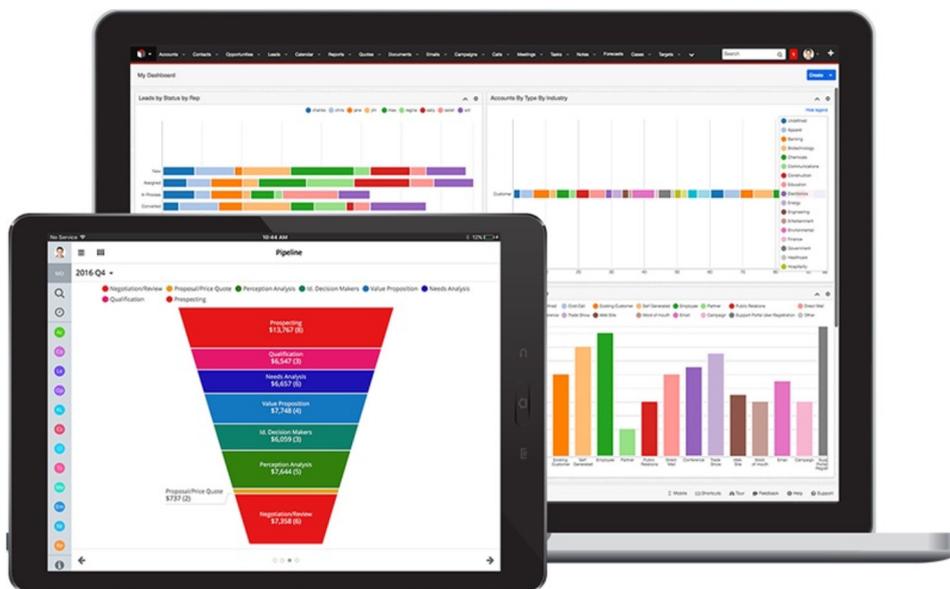
Create Purchase Orders Against Jobs

Technicians can create Purchase Orders against jobs.

Chapter Four

Fieldmagic Reporting

With both configurable CRM Reporting and beautiful out-of-the-box field service reports you'll be proud to present to your customers, fieldmagic certainly has you covered.



Beautiful, Well-formatted Field Service Reports

Fieldmagic provides industry-leading Field Service reports straight out-of-the-box, including Annual Site Reports and Job Reports. Reports can be configured to display asset attributes unique to the assets serviced, and can be branded with your corporate colours.

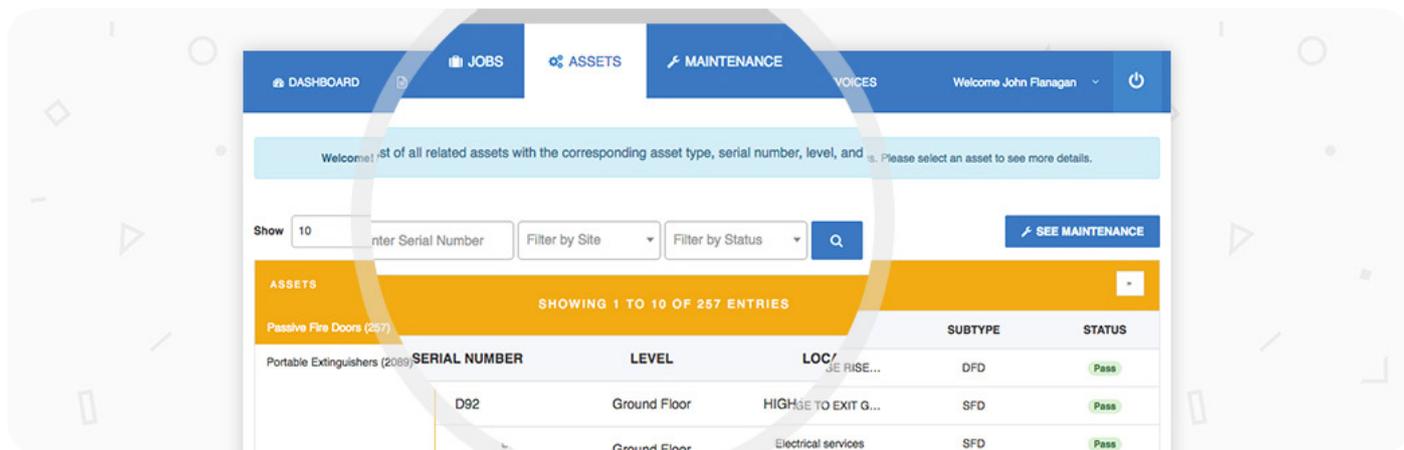
Powerful CRM Reporting Engine

Fieldmagic's Reports module allows users to build, generate, and manage reports for modules such as Customers, Sites, Quotes, Contacts, Calls, etc. Reporting is a valuable tool in the system as users can gather data from various modules to generate vital information for your organisation. There are four types of reports that can be built in the system: Rows and Columns Reports, Summation Reports with Detail, Summation Reports, and Matrix Reports.

Chapter Five

Customer Portal

Create efficiency and gain a strategic edge when it comes to customer service.



One of the most time consuming aspect of any field service business that can consume endless resources is providing compliance and service reports to customers. While field service software allows you to instantly provide these reports to your customers, a portal can further empower customers. The benefit of this is twofold, it frees up your back office resources to focus more on managing technicians, and areas such as customer service or business development, and second, it empowers customers to access their own compliance history, drill down on job and compliance information for each asset, review and approve quotes, and pay invoices online.

From the point of view of the customer, this provides the customer with the choice to liaise with someone in your organisation, or access the data themselves, which is often preferable for organisations that have a lot of assets to manage. Finally, this gives you as an organisation a strategic advantage over your competitors that aren't able to provide this level of ease of access to their customers. This can be a valuable tool the next time your largest customer goes out to tender.

Feature List

- The ability to view, search and filter and accept/reject quotes.
- The ability to view, search and filter Open Jobs.
- The ability to view maintenance schedules.
- The ability to view and pay invoices online (Payment gateway required).

Chapter Six

Accounting Synchronisation for Fieldmagic™

Accounting Synchronisation for Fieldmagic™ is a tool that pushes the Sales Invoices and Purchase Orders from SugarCRM to your Cloud Accounting Software.

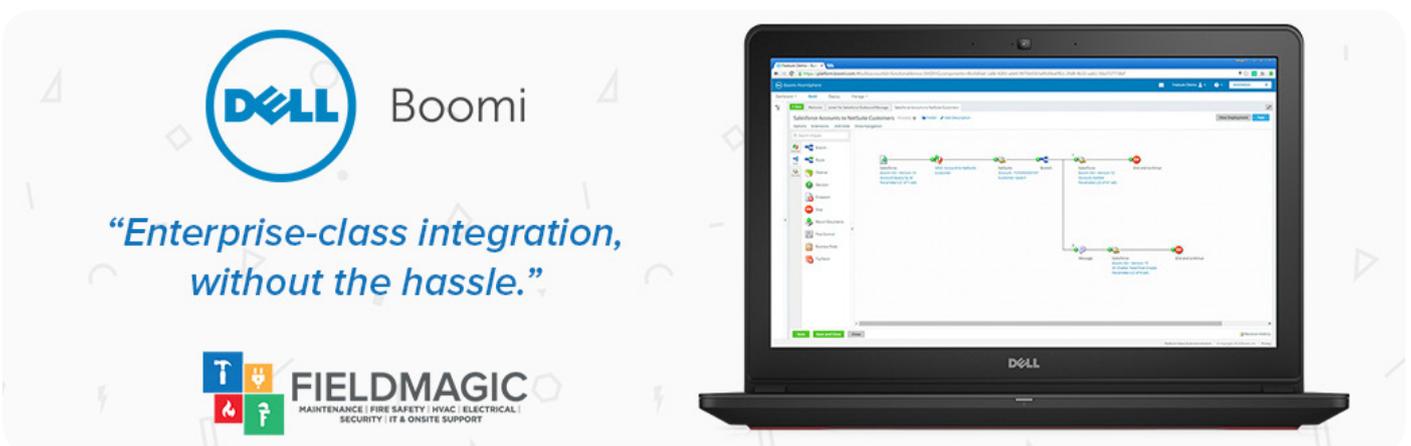
Connector Standard Functionality

- Allows the import of Accounts from accounting system into Fieldmagic.
- Allows the import of Accounting Codes from accounting system into Fieldmagic.
- Allows the import of Products from accounting system into Fieldmagic.
- Generation and sync of Sales Invoices to accounting package.
- Generation and sync of Purchase Orders to accounting package.



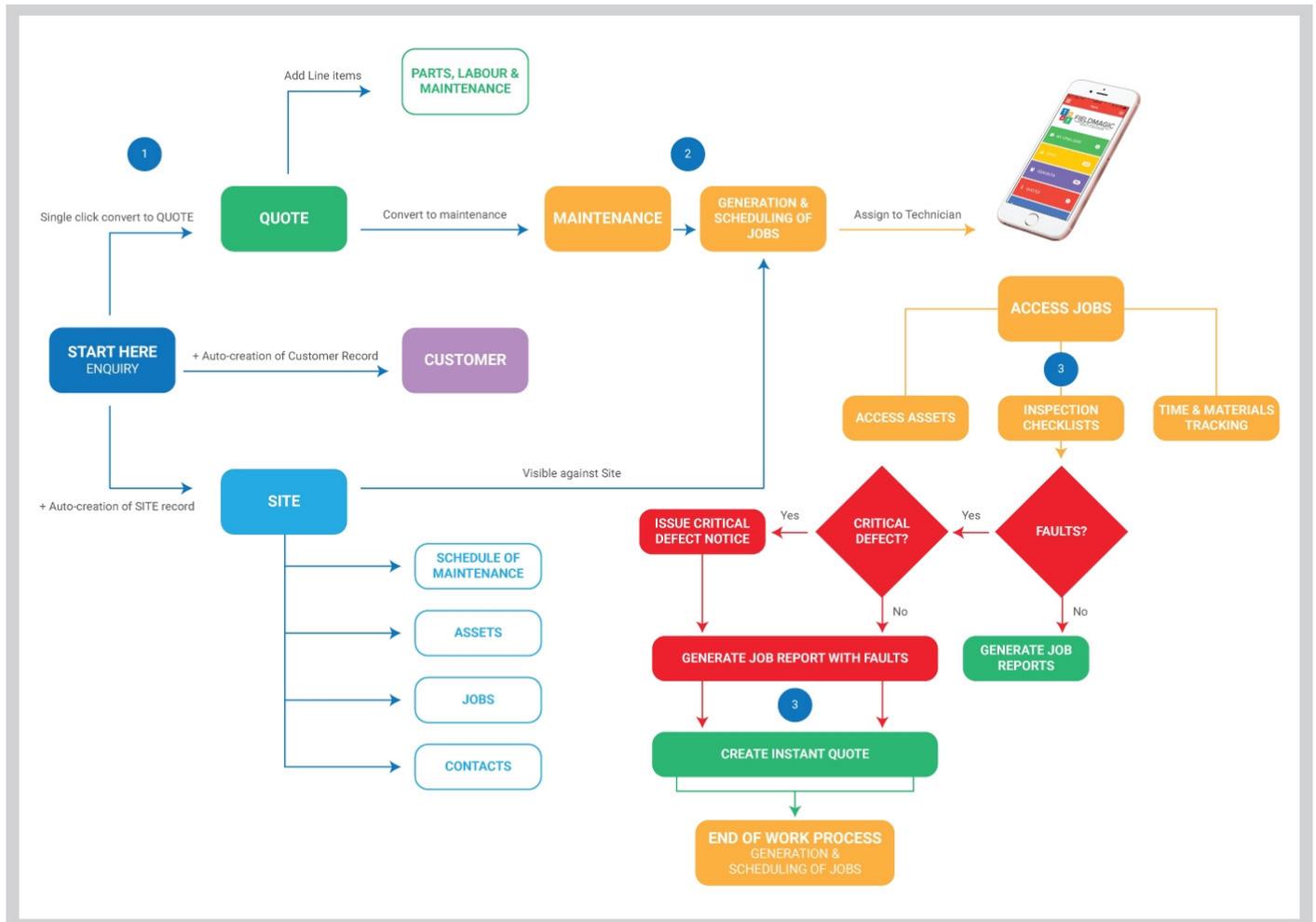
Connecting to SAP, Oracle, Netsuite and Pronto

In order to connect to these Accounting systems Fieldmagic will require middleware to carry out the integration. Fieldmagic for this reason is a certified Dell Boomi partner, the #1 Ranked integration platform according to Gartner, providing a robust integration solution.



Fieldmagic Typical Workflow

End-to-end Field Service processes designed to deliver excellence in operational efficiency and with a strong focus on customer service and reporting.



1. Enquiry to Quote Process

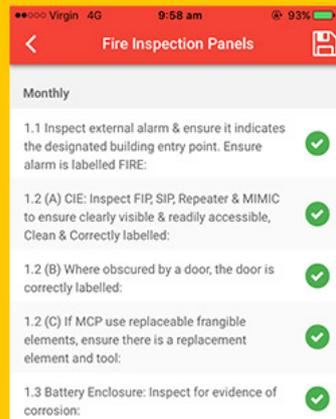
We start off with an enquiry, an early stage interest in your services. Its at this stage where we discuss the needs of the customer and progress the enquiry (sometimes referred to as a 'lead') to a Quote. At the stage of preparing a quote, we select the products and services required by the customer, and issue our quote.

2. Job and Maintenance Scheduling

If our Quote is accepted, we 'convert' any quoted maintenance items to a schedule of maintenance, where we can set the next job date so this goes into our scheduling. Ideally, this process should be automated, where once we access our scheduling, we can generate all of our jobs in a single click - each job bringing with it the associated checklist of tasks to check off on our service.

3. Inspection Checklists

Technician accesses jobs and related checklists to service assets.



4. Inspection Fault to Quote

Another key aspect that's critical to driving efficiency is the process of capturing asset faults, and how this transitions into quotes for repair work, reporting of asset status and then back into repair jobs. Fieldmagic allows technicians to inspect assets using electronic checklists, and should any faults arise, the system allows technicians to select from a list of likely failure points for that asset, and select a list of parts to be quoted for replacement.

This information is instantly available to office staff, who can convert the failed assets into a quote with a single click. Since technicians are able to select one or more parts related to the asset type to be replaced, these are automatically populated on the quote as line items with the correct pricing pre-populated into the quote. Office staff can then email the quote to the customer, who can approve the quote electronically via our comprehensive customer portal.

The result of the above workflow is typically 30-60 minutes per inspection quote in saved time that doesn't need to be spent re-entering fault data into a quote, interpreting technician notes and searching product lists manually. Fieldmagic provides an end to end seamless flow from field technician to office users to customers.

SERIAL NUMBER	LEVEL	LOC...	SUBTYPE	STATUS
D92	Ground Floor	HIGH...	SFD	Pass
	Ground Floor	Electrical services	SFD	Pass

5. Service Reports

The parallel process that underlies the above, is tying the asset inspection data into easy to generate asset status reports. Having captured our data in the field electronically, it's now possible to bring this into a coherent report - whether this be a job report, a Yearly Condition Report, or any other report. This is a step way down our workflow, but in order to get here, we need to have the right software and processes in place to deliver turn-key reporting to customers. Reports should also ideally be available online to view, via a customer portal - an option that can significantly reduce the administrative overhead of sending report after report.