

Phlo systems™

opsPhlo™

Field Service Management

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Maintain a real-time view of your customer's activities across all your operations

The opsPhlo Service Management delivers a complete set of functionalities for field service operations. Streamline processes to reduce response times and costs resulting in increased revenues and customer satisfaction that ultimately give you a competitive advantage.

Mobile Service Management	Keep your staff members connected through any browser-enabled device or using the native mobile Android and Apple iOS (iPad) app. Offer staff access to service information and customer data from anywhere at any time. opsPhlo runs on the entire spectrum of mobile devices, important for companies using laptops rather than small devices like phones.
Emergency Service Calls	Use visual tools to add unplanned service calls. Find out how changes to planned routes will affect the team with the least amount of impact to the planned schedule. Have the new service order sent to the technician's mobile device.
Equipment Maintenance	Record the history of equipment or machines installed at each customer site and track repair parts in stock. opsPhlo stores the equipment records from quoting through order, delivery, installation, and service work in the field. Information includes manufacturer, model, configuration, and scheduled preventive maintenance orders. Customer equipment can be associated to recurring schedules and contracts in opsPhlo Customer Management.
Warranty Management	Establish warranty offers for your customers, specifying which parts are under warranty to avoid confusion, mischarges, and objections. Multidimensional contracts (different warranty periods for different components of the system) help to track warranties from sales to repair in the field, specifying what is covered and what is not. This helps ensure billing accuracy and improve customer satisfaction.
Dashboards and Business Intelligence	Create personalized dashboards easily and turn raw data into rich visuals to track progress and spot trends as they happen. opsPhlo's business intelligence can also leverage Microsoft Power BI to deliver insights from multiple data sources that are key to your business.
Team Approach to Sales and Service	Customer Management (CRM) is part of opsPhlo, not a loosely integrated module. From marketing, quoting, bidding, to installation and field services, the customer information is visible throughout the organization providing a 360-degree field of all customer interactions. When selling equipment, the installation appointment can be scheduled while the user is in order entry.
Track Project Costs	Field Service Management is not just for small projects. When the installations are very large (tasks, people, or equipment), all the costs (time, materials, and expenses) of each phase of the project are tracked in opsPhlo Project Accounting (sold as an optional application). Compare actual project costs with original and revised budgets in real time.

Equipment Maintenance

Track the Details of Equipment Maintenance at Your Customers' Locations

Track all details of equipment and products installed at your customers' facilities by make and model. Define schedules for preventive maintenance service orders and associate them to recurring maintenance schedules or contracts.

Equipment Maintenance Inventory	Maintain all details of equipment and products installed at your customers' facilities by make and model.
Preventive Maintenance Schedules	Define schedules for preventive maintenance service orders and associate them to recurring maintenance schedules or contracts.
Appointment Generator	Generate appointments automatically for all service contracts with equipment maintenance requirements.
Service Templates	Create templates for a predefined set of services. For example, create a template for the clean-up and calibration combination for HVAC equipment.
Warranty Management	Establish warranties specifying the specific items under warranty to avoid confusion, mischarges, and objections. Classes can be mixed on the same service order, for instance, a two-year warranty on parts and a one-year warranty on labour.
Invoicing	Capture and invoice for all parts and labour related to the services rendered.
Service Parts	Provide access to service parts inventory and automated sourcing.
Mobile Services Management	Send updated orders and appointments to any mobile device.
Service Contracts	Create and manage multiple service schedules for each customer by location.
Master Contracts	Combine multiple contracts by customer.

Benefits of automating field services operations

Scheduling, Dispatching and Call Centre	Scheduling the right people at the right time with the right skills to perform work efficiently is handled quickly with opsPhlo Field Service Management. Quickly capture service needs and access customer information, product history, and resources required to shorten time between call receipt and job assignment. Create daily or weekly schedules automatically or using drag-and drop tools on the graphical dispatch board utilizing colours to identify the status of each service order.
Route Planning	Provides a powerful tool for optimizing routes for appointments with ability to filter appointments by several different criteria. Routes are plotted in Google Maps for each service person with lists of required resources (equipment or machine). Graphically displaying the routes visually informs the dispatcher of order status with different colours enabling them to rapidly respond and make route changes. Automatically uses Google map services to optimize the route to minimize the driving time. Since the route is displayed on the technician's mobile device, the route will change as traffic conditions change.
Maps Integration	Utilizes the most popular map provider with an interface familiar to everyone. Real-time graphical information about location, drive time, etc., is available anywhere. Changes to the route are instantly redrawn and available on the technician's mobile device.
Mobile Service Management	Keep your staff members connected through any device with a browser or with the native mobile Android and Apple iOS (iPad) app. They will be able to access service information and customer data from anywhere at any time. Being a full web ERP, opsPhlo can run on the entire spectrum of mobile devices. This is important for the companies that want laptops instead of small devices, like a phone.
Emergency Service Calls	Use the visual tools to add unplanned service calls. Find out how changes to planned routes will affect the team with the least amount of impact to the planned schedule. Have the new service order sent to the technician's mobile device.
Equipment Maintenance	Records the complete history of the equipment or machine installed at each customer's site and tracks repair parts in stock. With opsPhlo's integration of sales and service stores the equipment records through quoting, order, delivery, installation, and then service work in the field. It also includes manufacturer, model, configuration, and schedule preventive maintenance orders. Customer equipment can be associated to recurring schedules and contracts in opsPhlo Customer Management (sold as an optional application).

Inventory Management	In field services, tools and repair parts are typically spread across multiple vehicles and warehouse locations. With opsPhlo, you can get control and keep track of the locations and costs. Since inventory and purchasing are integrated, shortages can trigger replenishment orders. Inventory can be sent to a specific location and when the parts arrive, the dispatcher is alerted to schedule the service appointment for installation.
Service Contract Management	Recurring service contracts are a significant source of revenue. Visibility on renewal dates for each contract helps preserve the revenue. Dashboards can alert the service team of expiring contracts. Your team can create and manage multiple service schedules per customer and fine-tune appointments using the Schedule Calendar Board for staff and resources.
Warranty Management	Normally, Warranty Management is a time consuming, but required, activity. With opsPhlo, this task is integrated with the other applications. Establish warranty offers for your customers, specifying which parts are under warranty to avoid confusion, mischarges, and objections. Multidimensional contracts (different warranty periods for different components of the system) help to track warranties from sales to repair in the field, specifying what is covered and what is not. This helps to ensure billing accuracy, improving customer satisfaction.
Dashboards and Business Intelligence	All users of the system can stay up to date with the information that matters to them using opsPhlo BI (business intelligence). Personalized dashboards are easily created and turn raw data into rich visuals to track progress and spot trends as they happen. opsPhlo's business intelligence can also leverage Microsoft Power BI to deliver insights from multiple data sources that are key to your business.
Team Approach to Sales and Service	Customer Management (CRM) is part of opsPhlo, not a loosely integrated module. From marketing, quoting, building, and installing, and then in field services, the customer information is visible throughout the organization providing a 360-degree field of all customer interactions. When selling equipment, the installation appointment can be scheduled while the user is in order entry. (Customer Management is sold as an optional application).
Track Project Costs	Field Service Management is not just for small projects. When the installations are very large (tasks, people, or equipment) all the costs (time, materials, and expense) to the phases of the project are tracked in opsPhlo Project Accounting (sold as an optional application). Compare actual project costs with original and revised budgets in real time.