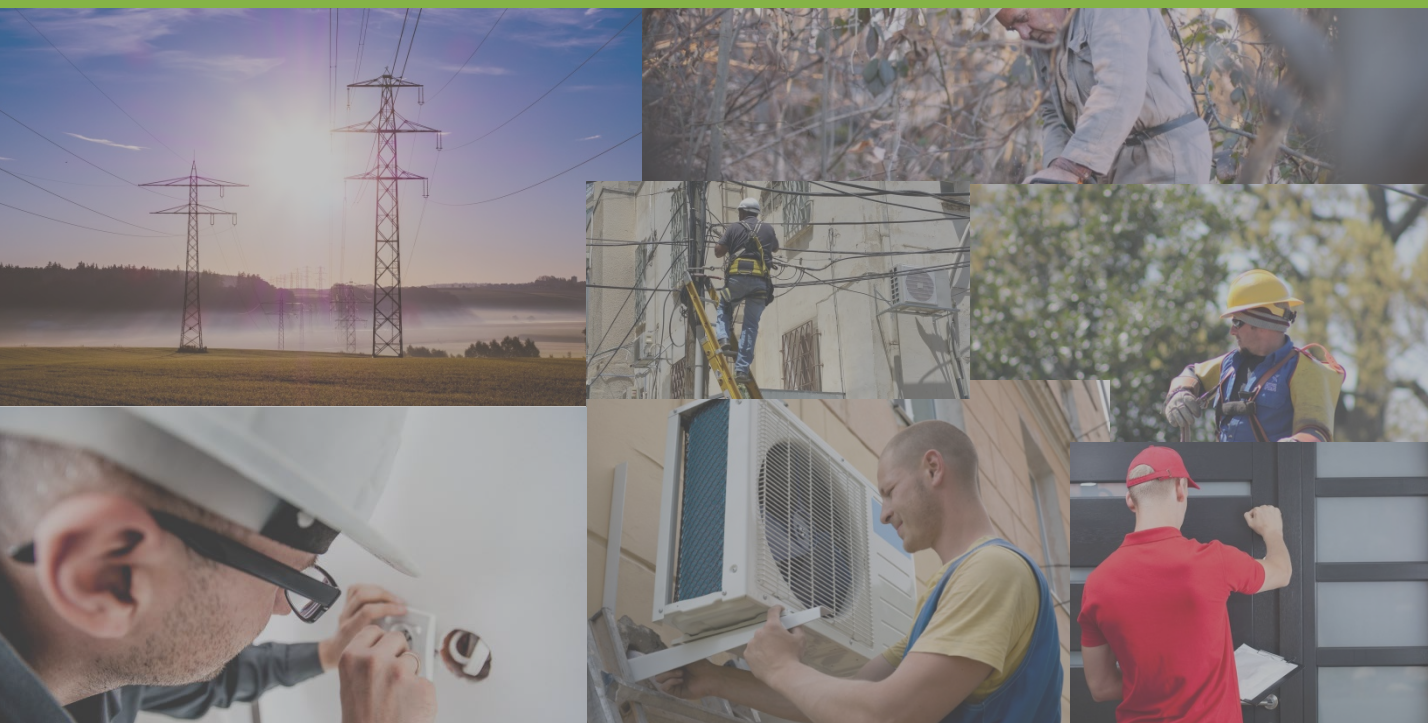


# FIXIFY OVERVIEW

WHITE PAPER



The purpose of this whitepaper is to inform interested users about the Fixify Field Service functionality through a deeper solution introduction.

# Table of Contents

1. EXECUTIVE SUMMARY
2. THE SOLUTION
3. CLOUD-BASED
4. HIGHLY SECURE
5. RAPID DEPLOYMENT
6. EASY MAPPING WITH GOOGLE
7. SCHEDULING RESOURCES OF ALL TYPES
8. THE SCHEDULING LOGIC
9. PLANNING
10. WHAT-IF ANALYSIS
11. MONITORING
12. MOBILE
13. INTEGRATION
14. PRIVACY POLICY

## EXECUTIVE SUMMARY

The field service solution industry continues to grow as more companies look to improve their customer service and reduce their operational costs to sustain profitable growth. The need to keep customers for small and medium sized organizations is more important than ever, as the business and the brand truly relies on exceptional customer service. Fixify's goal is to alleviate the difficulties of scheduling and technician management for service organizations by providing a field service platform to solve the complex issues these companies face in their day to day routine. We created to make the best possible cloud-based field service management suite, with functionality for all types and all levels of organizations. Service companies can now expand to their fullest potential without worrying about unnecessary upgrade fees or paying for additional functionality.

## THE SOLUTION

Fixify is a SaaS field service management application suite that automatically schedules work orders to field service representatives to create an efficient and cost effective schedule. It easily integrates with CRM systems (like Salesforce and MS dynamics) via pre- built adaptors. The mobile component provides field service representatives with a device agnostic solution that includes navigation via Waze and Google maps, to give field technician's what they need to get their job done accurately and efficiently. The solution fits with verticals of any field type, including but not limited to: telecommunications, private utilities, municipalities, oil and gas, home healthcare, HVAC, commercial and industrial equipment, home business services such as lawn care, chemical pool equipment services, pest control and many more.

## CLOUD-BASED

Fixify is a state of the art HTML5 web application hosted on Microsoft Azure cloud. The Azure cloud has high availability capabilities like geo-location load balancing that reduces network latency, automatic scaling of application instances that sustains application performance and data retaining for disaster recovery. This is imperative for companies of any size in field service, as they do not need to be concerned with system maintenance and requirements that can cause budgets to quickly inflate.

## HIGHLY SECURE

The security of the Microsoft Azure cloud ensures data and information on Fixify is always secure for every service business. This is key for sensitivity when it comes to customer data. The Fixify web application supports the latest secured communication protocol (TLS1.1/2). Business data is isolated (dedicated database per account) and protected by Azure firewall that prevents any access apart from the application. In order to maintain the most secure data, PII (personal identified information) such as customers' names and addresses, are saved encrypted in the database.

## **RAPID DEPLOYMENT**

The key to a successful field service management solution is not only the right product that fits a service company needs, but it also the swiftness of getting a solution deployed for use in a short amount of time. Fixify not only presents a product suite of features to fit needs of a wide range of service companies, but is also extremely easy to use thanks to the intuitive interface. Through a simple excel upload, a company can be up and running with data about their resources, work types, work locations, parts, as well as appointment booking calendars parameters. As the product is updated and more functionality is included, a dedicated account executive is there to keep customers up to date with onboarding sessions and additional self-training videos and content. This allows companies to self-train and continue to learn. Fixify support is also readily available to help with any deployment needs.

## **EASY MAPPING WITH GOOGLE**

Google is the most influential company of this generation, and that's why Fixify chose it to be the selected mapping service within the solution. Not only is it always up to date, but Google's accuracy in terms of geo-coding stretches globally. This helps give Fixify users the most up to date schedule in real time, with street views, satellite views, and traffic displays based on historical and current conditions in a given location. The power of interfacing with Google maps capabilities gives Fixify the power of street level routing, geocoding, reverse geocoding, the snap to roads view, and road speed tracking. When dealing with the fleet management module of Fixify, users can gain the benefits of Google Road API for tracking exact positioning and speed on nearest roads. For planning, the Google API allows users to create geo-location polygons easily and accurately to bound resources to certain service areas.

## **SCHEDULING RESOURCES OF ALL TYPES**

Fixify was made to take a variety of resource types into account. This includes individual field service employees (who are internal or external to the company), contractors as capacity buckets which can be handled in a separate portal for easy tracking, ad-hoc teams for grouping multiple resources on a certain job at once, teams, and even special vehicles like cranes, and platforms. No matter if your field technicians are considered as nurses, engineers, installation representatives, field service personnel, lawn care experts, repairmen, mobile field agents, Fixify is flexible to how every service business operates.

## THE SCHEDULING LOGIC

Creating a high quality and cost effective schedule is not easy, as complex issues can arise at any time to throw off an entire days' worth of work. Within Fixify, our scheduling logic is already tuned for industry best practices., so no work is required by the business to get started. To make adjustments to this, adjustments of business rules and objectives can be adjusted easily within the admin account so that every business can tune their system to what might be considered an ideal schedule for that business. Business rules are constraints within the system such as work order dependencies, qualifications matching, working hours and labor regulations. Business objectives are what the business is aiming to accomplish through the system such as even work distribution, resource precedence levels, and minimizing travel time. A System Default Scheduling Policy is included in each account. Additional Scheduling Policies can be added and tuned by schedulers. Business rules can be either enabled or disabled while the Business objectives can be tuned by adjusting their importance. The current scheduling methods give flexibility to how the business operates, while always taking into the account the current business rules and objectives.

- Drag and Drop - allows schedulers to select from the work list and drop on the Gantt to re-shuffle the schedule for a particular technician.
- Appointment booking - allows for a work order to be scheduled directly from the appointment booking module, which is useful for recurring appointments related to certain accounts.
- Batch scheduling - allows for schedulers to select the work orders they want to reschedule or schedule all at once rather than one by one.
- 'Find Technician' - presents valid candidates for a selected work order on the Gantt or on the map including traffic information, thus making it very useful for same day scheduling.
- Schedule Update – real-time schedule alignment.
- Background optimization – continuously optimize the next period to ensure the most cost effective schedule at the beginning of the day.
- Fill out – fill out idle technicians with low priority work that is relatively close to their center of work to increase utilization

## PLANNING

Fixify's Resource Capacity Planning allows companies to distribute field technician's availability according to different responsibilities, while always taking into account how the business operates. This is especially important for companies who have planned maintenance that also need to leave time allotted for higher demand or emergencies. The capacity planning view can be used to select specific days to assign appointment booking capacity reservation definitions for all Field Techs in the selected Scheduling Territory. The reservation on a per diem basis is defined as a percentage of the day that should be reserved for non-appointment related work (preventative maintenance, emergencies, etc.)

In the Geo-locations view, users can utilize the comprehensive tools to bind Field Techs to predefined geographic areas. These geographic areas can be different on each day to improve service coverage and reduce crossing routes or clustering. If another technician needs to be assigned outside of their territory for a given day, Relocations allow for periods of time where a Field Tech can be relocated to another territory that is not their default scheduling territory. Within the business rules of Fixify, users are also able to check whether they should be able to schedule during calendar non-availabilities. The system will ensure work orders are not scheduled during these times, such as in the case of corporate or team events such as training.

## WHAT-IF ANALYSIS

Fixify provides schedulers with a set of tools that help create varying schedules for the same resources, and then decide which best meets the business KPIs (key performance indicators) before finalizing the schedule. This enables users to run scenarios and see how the schedule will play out in certain ways. A key feature within the scheduling view is the ability to take a 'snapshot' of the schedule while testing a new schedule or a new scheduling type. Users have the ability to save each snapshot, name it in the system, and then restore the original schedule without fear of ruining the entire day.

Additionally, the schedule evaluation method will present schedulers with the current KPI values for each snapshot schedule, which makes it easy to compare between different scheduling alternatives for the best possible business outcome.

## MONITORING

As important as it is to create an optimized schedule, monitoring this for real –time alerts and up to date working information is also key to a successful service business. The monitoring tools of Fixify allow for real time status updates and work progress right from the field, which will show to schedulers on an the easy to use Gantt chart or Map. If a field technician has a personal emergency come up and misses one of their routine maintenance appointments, the system will alert the scheduler in real-time in order to get the appointment re-scheduled immediately to another technician.

## MOBILE

Fixify's Mobile Solution is an HTML5 device agnostic application. Techs can access their work orders, report work status, track parts usage, capture photos on-site, while using any mobile device. All job status updates sync with the back office in real-time and on the scheduling Gantt, so the schedulers are always up to date. Execution forms can be easily configured for each business use case in order for field techs to capture vital information while on-site. Field techs can view their entire work list of scheduled jobs for the day, control inventory and parts management for each job, as well as see all scheduled jobs in a calendar view for upcoming appointments and services. Field Techs can communicate internally through the application's Message Center, while also being able to use the 'Text the Customer' feature for enhanced customer engagement. A native app is currently on our road map and will be launched by early 2017.

## INTEGRATION

Fixify is RESTful. An easy and secured GET/POST API allow external and authorized systems to create, update and delete work orders in Fixify as well as to use Fixify internal logic services like appointment booking. Fixify utilizes Azure Web Jobs technology to push information to external systems like when the work is published to the technician or when the work is completed.

The following built-in adapters that integrate with Fixify are already available:

Salesforce – integration is based on ‘Cases’. Cases are submitted to Fixify and when publishing the schedule, an event is created on the assigned technician’s Salesforce account.

MS Dynamics CRM – integration is based on ‘Incidents’ (a.k.a. Case). Cases are submitted to Fixify and when publishing the schedule an appointment is created to the Case.

## PRIVACY POLICY

When you register to use our Services or the Site, or choose to submit information to the Site, Fixify may collect information from you, such as your name, postal address, email address, telephone number, your firm’s name, or comments. Generally, the information Fixify collects is used only for Fixify’s own internal purposes, for example, to improve the Services and the Site, to improve Fixify’s marketing and promotional efforts, to statistically analyze Site usage patterns on an aggregate basis, to improve Fixify content and Site offerings, and may be used by Fixify to contact you to provide you with information Fixify believes may be useful to you. Fixify believes that these uses allow it to improve the Services and Site and to better tailor them to meet users' needs. At no time will Fixify sell or broker any of the information that is received from companies to any third party, unless if legally required to do so, if requested to do so by a governmental entity or regulatory authority, or if Fixify believes in good faith that such action is necessary to comply with legal requirements or process, prevent a crime, or protect national security. Fixify maintains rigorous physical, electronic and procedural safeguards to protect personal information against unauthorized access or disclosure, accidental loss, use, alteration or destruction. “Cookies” may be used for tracking information to create information on user demographics and site traffic patterns on an aggregate basis and is not connected to the identities or other personal information of individual users.

## ABOUT US

The personal experience behind Fixify is unparalleled. With years of combined experience in the field service solution industry, the founders have some of the most well rounded insights and knowledge into the needs of workforce management companies. Over the years, we have seen the way that service enterprise companies in this market struggle with the implementation process and the cost of large enterprise solutions. With Fixify, we aim to cut out these road blocks to allow all service organizations the optimization solution they deserve, at a cost they can afford.

**To learn more about Fixify, visit us at [fixify.com](https://fixify.com).**