

FieldEZ Lite for HVAC

FieldEZ Lite's pre-configured business workflows has been specifically designed keeping in mind the day-to-day requirements for HVAC technicians as well as dispatchers and managers.

Workflows

FieldEZ Lite runs on the concept of workflow. A workflow is a group of activities which help the user to complete a job. Essentially these are Job-types.

For HVAC there are three main workflows:



Each workflow has a set of activities or steps, which are customized to the HVAC requirements. These set of activities (also called as statuses) are pre-defined – but can be renamed on request. The workflows too can be renamed.

To complete a job, the user updates these statuses, adding any other information along the way. This can be:

- Job remarks
- Products / line items consumed
- ETA
- Images
- Customer signature and feedback

These have also been pre-configured as per the HVAC requirements, but can also be tweaked on request.

The typical flow of the status are as follows:



The user also has the option to reschedule the jobs, add the parts consumed, mark any job delays and more.

The FieldEZ Lite mobile app is built on native iOS and Android platform, which means better responsiveness, richer features and ability to working offline mode.

More for the HVAC Technician



- Create Recurring Jobs (eg: monthly periodic maintenance)
- Create Jobs for a crew / team
- Cascading of Jobs (ideal for large projects: a job is automatically triggered when another one is completed)
- Works in Offline Mode
- Automatically send text / SMS on any status (eg: when starting to site, or when delayed)
- Add parts consumed with auto price lists, as well as request for spare from HQ
- Capture signature and customer feedback.
- Auto-email job completion report to customer / manager
- Routing & Driving directions from the mobile
- Invoicing on mobile
- Mark Attendance & Leave for efficient scheduling
- Create and Assign jobs from mobile

More for the Manager and Dispatcher

- Schedule jobs using map view or Gantt chart (day, week view)
- View the status of every job in real-time
- Track Invoice payments with seamless integration to QuickBooks, Xero and more
- Integrate to dozens of other apps including Zoho, Salesforce and Zendesk
- Create SLAs and alerts if jobs are delayed or not closed
- Customers can get instant update via text / SMS and email on major activity updates
- Option for Customer Portal – customers can request for jobs, and track its status

