

SERVICE MANAGEMENT

Connect Managers, Dispatchers and Technicians with the Information They Need, Including Customer and Service Call History, Work Orders and Dispatch Schedules

Spectrum® Service Management

Spectrum Service Management is a complete solution for work order management and service dispatch that works completely in the cloud allowing technicians to process work orders directly from the field.

- + Service Contracts
- + Work Orders
- + Dispatch
- + Field Data Collection
- + Billing
- + Truck Inventory
- + Purchase Orders

Managers have immediate visibility into customer and service call history—dispatchers can create, prioritize and schedule service calls all from one screen—and customers can even be invoiced automatically when work is complete.

Enjoy full control over the execution and profitability of your service and maintenance contracts with Spectrum's service management solutions.

Schedule preventive maintenance visits months in advance and specify when you want to bill.

Create or append work orders from incoming service requests and dispatch technicians efficiently.

Track make, model, serial numbers and locations of all serviced equipment and quickly verify equipment and component warranty and service coverage information.

Generate proposed and executed contracts and automatically bill per contract terms.

Easily review customer service history and quickly invoice for work performed.



Mobile Solution: Field Tech

Field Tech allows technicians and other field operations staff to remotely access, create and update work orders in the field. Using a tablet device, technicians can access the Field Tech app on Spectrum's Dashboard, log in and see work orders or jobs they have been assigned. All of Field Tech's functionality, including login, work order creation, and data entry, are integrated and synchronized with Spectrum applications, thus eliminating double entry and streamlining the flow of information. Field Tech's customizable Info Bar allows users to quickly access all of the application's many features, including seeing which work orders they have been assigned, entering labor hours, managing materials and site equipment, creating and managing purchase orders, creating and updating charges and billings, and viewing complete service history.

Wilson Electric Streamlines Work Orders, Service Management with Spectrum®

Wilson Electric Services Corp. has been providing special systems and electrical contracting services to the Southwest since the late 1960s. The company, with offices throughout Arizona and New Mexico, has built a significant service component to its business over the decades and today handles more than 2,000 work orders in the field each year. Yet, the growing company struggled for years with inefficient ways to process and account for those work orders.



“We didn’t have anything for our service department other than job cost and contracts. Because they do a lot of small, rapid turnover work, jobs and contracts aren’t really made for that, so we were trying to fit a square peg in a round hole,” said Terry Oakes, Wilson Electric’s CFO, noting that service billings and costs would get dumped into its job costing system and it would have to be manually determined which costs were associated with which services. “It was a lengthy, time-consuming process to get all of those line items on an invoice. We never could be sure that we

billed everything we should have or that all of the information was right. So it was a manual process, very prone to error.”

Wilson Electric decided to move to Spectrum to get a better handle on all of its operations, including service management. With Spectrum’s work order capabilities, Oakes said Wilson was able to manage the financials of a service division the way they should be managed.

“All of our costs and billings are tracked now. Service work is able to be billed as separate line items automatically with time and material or as a lump sum. We can see which of our people are bringing work in, how they are doing. We know if we’re profitable or not, which we couldn’t always tell before. We can do a whole lot more analysis of the work we’ve done—what’s profitable and what’s not, which customers are profitable and those that aren’t—with very fine precision that we never had

before,” Oakes said. “It helps us not just track and analyze things, but it directs our business development efforts, which we couldn’t do before—except by guessing.”

Prior to Spectrum, Oakes said that billing information on work orders was often miscalculated, or even worse, whole work orders would go unaccounted for. With more than \$5 million a year in Wilson Electric business being run through work orders, and the average work order being around \$2,500. Oakes said these mistakes were costing the company significantly. “If we recaptured even a few of those, that’s several thousands of dollars, and that’s a significant amount of money to add to your bottom line. Today, with Spectrum, I’m confident we’re capturing everything now,” Oakes said.

Since work orders are tied into Spectrum, Oakes added that he can pull detailed reports and give technicians in the field more data to work from.

The company also utilizes Spectrum’s service contracts to manage revolving service and maintenance work. And, Wilson Electric enjoys even more capabilities and detailed analysis on the contracting side through the robust job costing functionality in Spectrum. “It’s like having the best of all worlds—solutions geared to better manage all of the different facets of our business.”

Oakes added that Wilson Electric is excited about Dexter + Chaney’s continued development commitment to Spectrum’s service management features, including the newly redesigned dispatch board for technicians and the Field Tech mobile app, which allows work orders to be generated and signed in the field and instantly be entered into Spectrum for processing.

