



USING ezServiceHUB Personal experience Insights

Patricia shares her personal insights about coming from a manual paperwork process to using a field service software & App process to manage many service calls and engineers.



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Background/ skills:

Senior Service Co-ordinator for HVAC, Chillers and BMS

My personal story....

For many years, I worked as a **Senior Service coordinator** for a large UK global HVAC company, looking after 20 engineers, with areas of expertise ranging from HVAC, Chillers and BMS. Initially, the company operated a manual system to raise call outs, purchase orders and later invoicing. Engineers used paper documents to complete their work order sheets. These would then get sent back to me via post - as you could imagine, we had storage rooms full of service reports!

If a customer requested some paperwork back from 2-3 years ago, there was no archiving system to locate any of these original documents.

Timesheets were also done by hand and emailed over to me to input manually into the payroll system. As much as I would consider myself good at managing multiple jobs and engineers – my life was continuously hectic and stressful.



Then one day, upper management (in their wisdom) transferred us to an expensive American CRM/field management system that was guaranteed to help us track it all.

They did this without any consultation with the people doing the groundwork. It turned out that the nature of the system meant it was still a very manual system and not automated. It would take at least 10 minutes to raise a job for an engineer from a location; we had to create a case, add a call reason, contact details and date/time, then check entitlement, raise a work order, make an estimate, add it to the dispatch console, none of this was done automatically.

A huge task was knowing which engineer had the correct skillsets to be able to complete the job. We had a lot of issues at first, as engineers found the App not very user-friendly - the feedback was the system was not user friendly enough. It made their work more tedious and time-consuming than was necessary.

If I can perhaps suggest anything, I think that whoever is responsible for buying the field management software for your company to consider who is using it and what is required. Engineers, for example, don't have a lot of time - so their mobile app must be easy to use and forms easy to complete. Service coordinators need to be able to transform a Quote quickly into a Job. Track that job and prepare it for invoicing ASAP.

In my personal experience, a lot of money is often wasted buying the wrong field service system.

The good news is that all has changed since I started using the **automated end to end ezServiceHUB & ServiceJobs App**. For instance, all jobs for maintenance contracts are created at the same time when a contract or renewal is set up; all I need to do is drag and drop a work order on the scheduler for when an engineer needs to complete a service, same experience with reactive jobs or quotes, everything is done on one page – we simply fill out all relevant info and from this screen and a work order is automatically sent to the engineer – this process alone has saved a lot of time.

Scheduling was always a big part of my job, and I had to keep a schedule on an excel spreadsheet as the previous systems did not track whether a service has been completed or not; notifying customers of the attendance proved to be a time-consuming task as well, the **ezServiceHUB** again does this automatically, when setting up a job we can click an option for an automated email or SMS to be sent to the customer.

For years I was used to quite complicated, expensive "manual" field service software.



When I started using the **ezServiceHUB**, I could not believe how everything on this system is automated, starting from scheduling to creating quotes. A job can be set up and dispatched to the engineer's app in under a minute – along with notifying the customer. We can renew contracts with a click of a button, and best of all, we have a live view of all completed jobs, which means when the information comes back from the App, the job has been automatically costed, so invoicing became a breeze.

As an experienced Service Coordinator, this is the easiest, most user-friendly software system I have used and I wish I were introduced to **ezServiceHub** a lot sooner. My life is now a lot less stressful.



If you have a Maintenance company and install, repair, and maintain products or services and need an easy-to-use management system with an excellent support team - please contact us.

[Our dedicated business consultants will be happy to assist you.](#)



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