

# FieldXL

Discovery Template

## Referring Representative \*

First Name

Last Name

## Referring Reps Email \*

example@example.com

## Company Name \*

## Company Contact \*

First Name

Last Name

## Company Contact Email \*

example@example.com

## Current Systems and Users

### How many people have access to your current system?(Admins) \*

Admins

### How many people have access to your current system? (Standard Users) \*

Standard Users

### What field service management system(s)and/or processes are you currently using?

**How do your field technicians, estimators, and sales reps interact with the system?**

## **Scheduling and Dispatching**

**Is Scheduling a Manual Process? \***

Yes

No

**Do you Optimize Routes for Efficiency? \***

Yes

No

**How do you currently schedule jobs and assign work orders to your field team?**

**What challenges do you face when dispatching technicians to job sites?**

## **Estimating and Invoicing**

**How do you currently create estimates and send them to clients?**

**What is your process for converting estimates into active work orders?**

**How do you generate and send invoices?**

## **Job Management & Documentation**

**How do you track job progress from start to completion?**

**What tools do you use for capturing job site photos, notes, or customer signatures?**

**How do you currently track warranties on work completed and equipment?**

**Do you require technicians to complete checklists or forms for compliance or quality control? \***

Yes

No

## **Payment Processing and Financials**

**What percentage of your payments come from credit cards vs. checks or cash? \***

**Are you currently integrating your field service software with QuickBooks or another accounting platform? \***

Yes

No

**Do you have a system for collecting payments in the field or online? \***

Yes

No

## Team Collaboration & Communication

**How does your team communicate internally about jobs? (e.g., email, text, app notifications)**

**What challenges do you have ensuring the field and office are in tune?**

## Growth, Reporting, & Pain Points

**What are the biggest frustrations with your current system(s) that you'd like to improve? \***

**If you could change one thing about how you manage your field service operations, what would it be? \***