



Field Service Management Platform

Topics We'll Cover:

- Product Overview
- Product Benefits
- Onboarding Process

Product Overview

FieldXL is a feature-rich field service application that allows for quick and easy customization for an individual business' needs. The benefits of providing a number of features include:



Product Benefits

FieldXL is designed to empower field service companies to help manage the people doing the work for your business.

Who

People

Manage your team and customers with intuitive CRM, scheduling, and time tracking. Get your techs onsite quick with route optimization.

What to work on

Work

Track what work to complete on your projects at all locations. Gather data on critical assets in the field to predict maintenance opportunities

Grow

Business

Immediately collect payment when the job is complete. Utilize reports to improve efficiency and operational work streams.

People

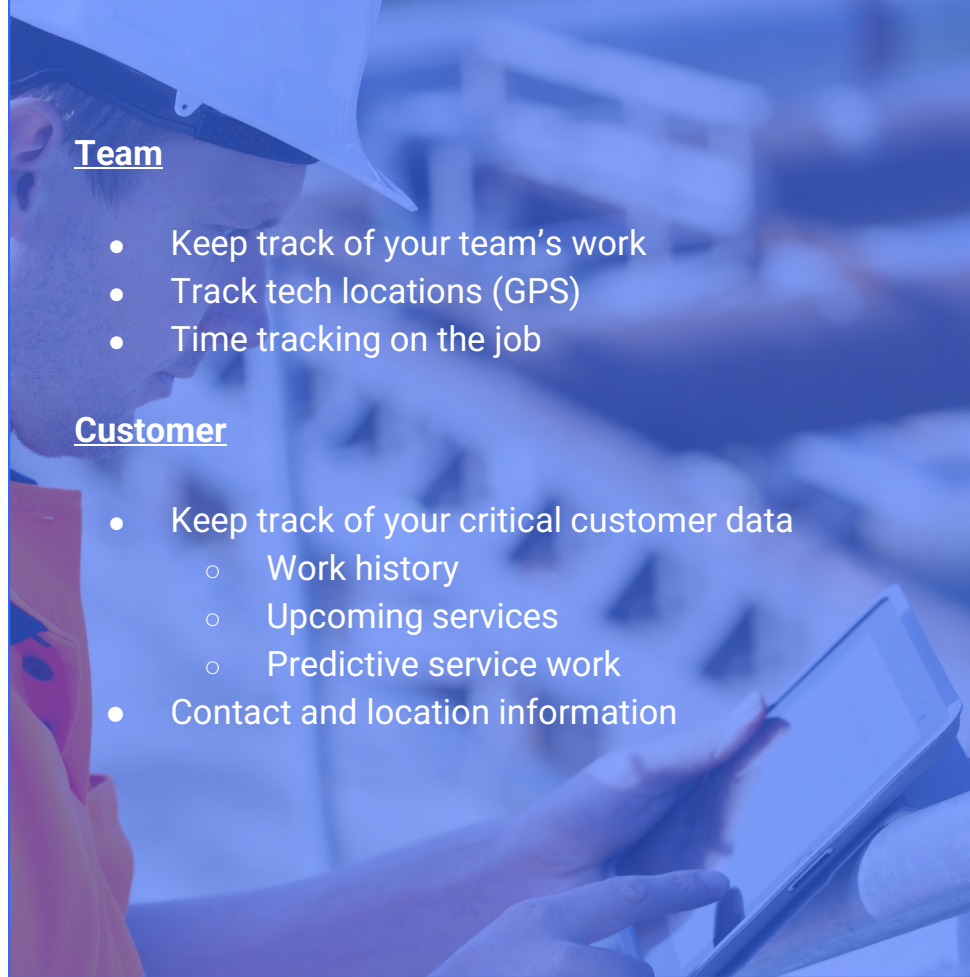
Manage your team and customers with intuitive CRM, scheduling, and time tracking. Get your techs onsite quick with route optimization.

Team

- Keep track of your team's work
- Track tech locations (GPS)
- Time tracking on the job

Customer

- Keep track of your critical customer data
 - Work history
 - Upcoming services
 - Predictive service work
- Contact and location information



Work

Track the work required to finish your projects at all locations. Gather data on critical assets in the field to predict maintenance opportunities - before it's needed.

A blue-tinted background image showing a person wearing a hard hat and safety vest, looking towards a large piece of industrial equipment, possibly a train or bus, in an outdoor setting.

Project Management

- Keep track of project work

Location

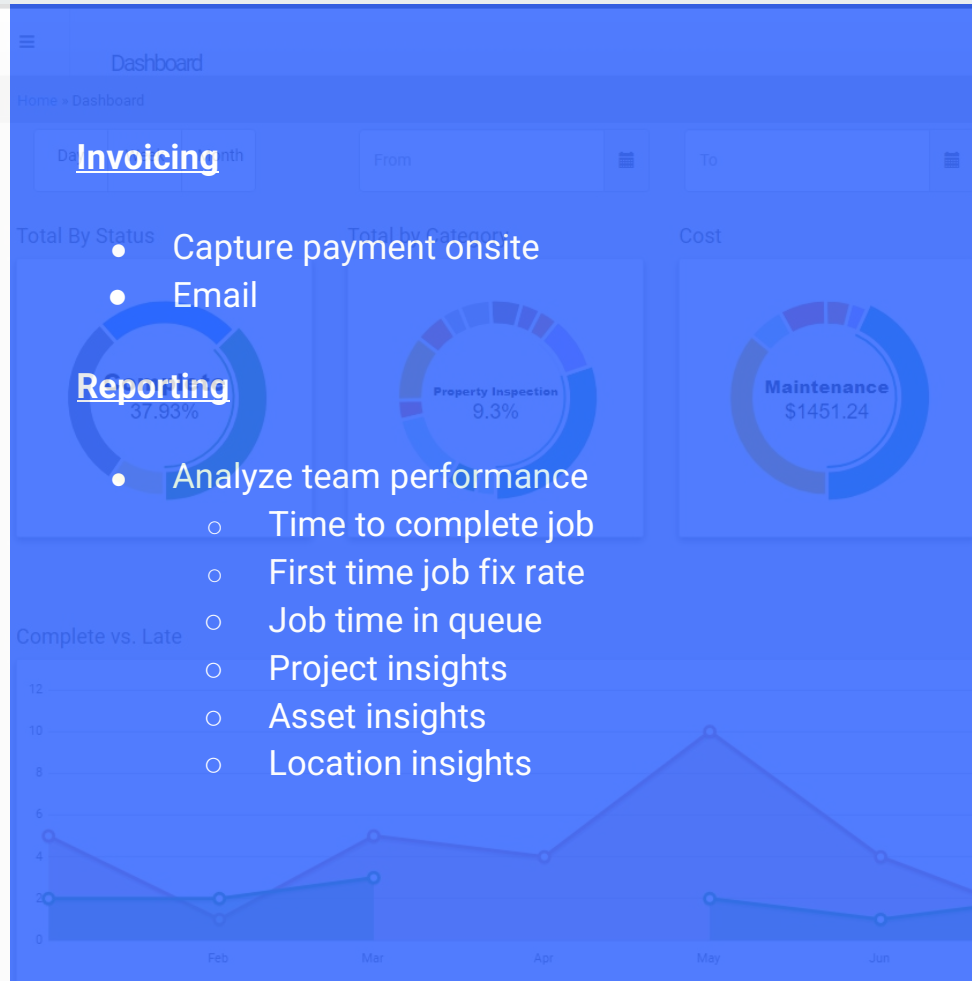
- Capture insightful location/facility data
 - Work history
 - Predictive service work

Asset

- Capture insightful asset data
 - Work history
 - Predictive service work
 - Warranty

Business

Immediately collect payment when the job is complete. Utilize reports to improve efficiency and operational work streams.



Customer

How we can help

Provide easy to use mobile solution
Reduce number of operational systems
Streamline workflow

Profile

Key decision maker
Service business owner

Goals & Challenges

Save time and complete more jobs
Reduce manual work
Grow business

Demographics

Age: 25 - 55
Revenue: \$750,00k+
Tech savvy / mobile device

Administrative Dashboard

+ Personalize

Search

 Search

Welcome, admin

Contacts

1

Work Items

7

Invoices

4

Recent content

- Route - [Route1](#)
5 hours 5 minutes ago
- FXL Invoice - [Test Invoice1](#)
5 hours 52 minutes ago
- FXL Invoice - [Invoice Item](#)
1 day 1 hour ago
- Work Order - [AC isn't working](#)
2 days 3 hours ago
- Service Request - [AC isn't working](#)
2 days 3 hours ago
- Estimate - [AC isn't working](#)
2 days 3 hours ago
- Estimate - [AC isn't working](#)
2 days 3 hours ago
- Work Order - [Work Order](#)
3 days 16 hours ago
- Estimate - [Estimate](#)
3 days 16 hours ago
- Change Order - [Change the color of the tile](#)
3 days 16 hours ago

My Work Items

ID	Title	Status	Due Date	
266	Project	Not Started	NA	Preview
286	AC isn't working	Complete	NA	Preview
268	Service Request	Complete	2024-11-05 - 2024-11-05	Preview
282	AC isn't working	Complete	2024-11-05 - 2024-11-05	Preview
269	Task	Not Started	NA	Preview
271	TaskA1	Not Started	NA	Preview
272	TaskA2	Not Started	NA	Preview

1 >

Field Tech Dashboard ☆

+ Personalize

View Default Dashboard Edit Permissions

Calendar

Due Today:

15

Calendar

Late Items:

3

Calendar

< > today

November 19, 2024

month week day list

Tuesday

all-day

7am

8am

Work Order: 153

9am

Work Order: 154

10am

11am

Work Order: 155

12pm

1pm

2pm

Work Order: 156

3pm

4pm

5pm

Financial Dashboard ☆

+ Personalize

View Default Dashboard Edit Permissions

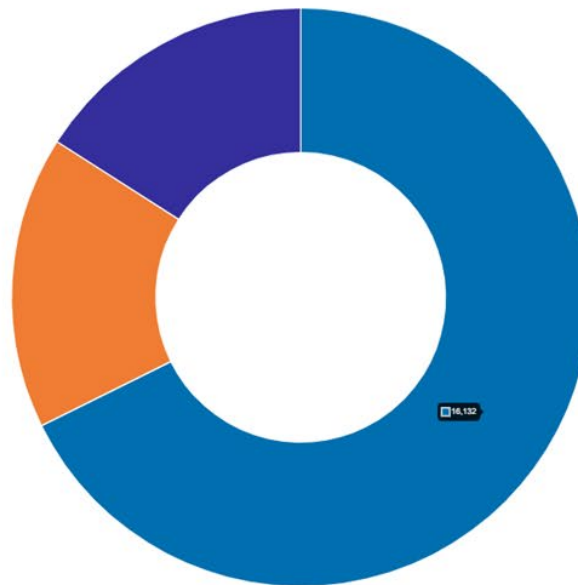
Invoice Total #

10

Invoice Total \$

23,832.00

Invoice Chart Data (By Status)



Work Items

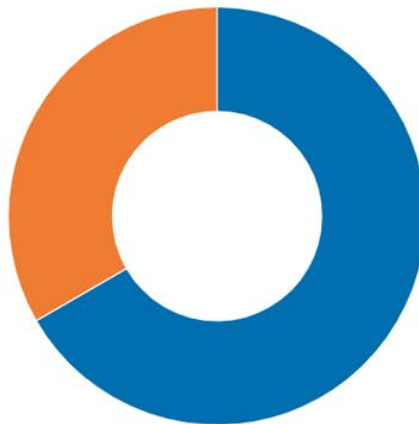
+ Personalize

Work Status



49 Closed
17 Open
12 Not Started

Work Category



24 Repair
14 Maintenance
40 New

Work Item (list)

ID	Title	Status	Work Category
366	This is a sample sr	Complete	Installation
352	Work Order Sample	Complete	
346	Jerry Beach House SR	Not Started	

John Doe

[View](#) [Edit](#) [Delete](#) [Revisions](#)

Contact

No description

General Information

- **Account Status:** Active
- **First Name:** John
- **Last Name:** Doe
- **Phone:** 8658880584 **Type:**
- **Email:** john@test.com

Status Information

- **ContactID:** 12
- **Contact Type:** Customer

Add Contact

Work Items

[Add Service Request](#)[Add Estimate](#)[Add Work Order](#)[Add Project](#)[Add Invoice](#)[Add Location](#)[Add Note](#)

1

[Service Request](#) [Estimate](#) [Work Order](#) [Project](#) [Location](#) [Invoice](#) [Note](#)

Service Request

ID	Content type	Title	Contact	Preview	Custom text
268	Service Request	Service Request	Name John Doe	Preview	Edit
282	Service Request	AC isn't working	Name John Doe	Preview	Edit

Jerry's Beach House

[View](#) [Edit](#) [Delete](#) [Revisions](#)

Location

[Add Location](#)[Add Contact](#)[Add Asset](#)

General Information

- **Address Line 1:** 1010 U.S. 98
- **Address Line 2:**
- **City:** Destin
- **State:** FL
- **Postal Code:** 32541

Status Information

- **LocationID:** 19
- **Location Type:** NA
- **Contact:** Jerry Richards

[Contact](#) [Service Request](#) [Estimate](#) [Work Order](#) [Project](#) [Asset](#)

Work Order

Displaying 1 - 3 of 3

ID	Title	Contact	Assignee	Due Date	Status	
366	This is a sample sr	Jerry Richards	NA	NA	Complete	Preview View ▾
352	Work Order Sample	Jerry Richards	NA	NA	Complete	Preview View ▾
346	Jerry Beach House SR	Jerry Richards	NA	NA	Not Started	Preview View ▾

Sample Asset

[View](#) [Edit](#) [Delete](#) [Revisions](#)

Asset

[Add Asset](#)

This is an asset

Asset Cost: \$2,000.00

General Information

- **Active:** Yes
- **Location Name:** Jerry's Condo
- **Address:** 123 Center Park Drive
- **City:** Knoxville
- **State:** TN
- **Postal:** 37922

Status Information

- **AssetID:** 18
 - **Asset Type:** Equipment
 - **Asset Manufacture:** Acmek
- Asset Model Number:** ABC123 **Asset Serial Number:** 123ABC

Where is it?

Placement: Its in the closet[Detail](#) [Work Order](#) [Expense](#) [Photos](#) [Warranty](#) [Report](#)

Specs

5
Asset Type: Equipment
Serial Number: 123ABC
Asset Model: ABC123
Asset Manufacture: Acme

AC isn't working

View Edit Delete Revisions

Service Request

Complete

Convert To Estimate

Description

Customer said ac isn't working

Contact Information

- **Contact Name:** John Doe
- **Location:** Johns Home
- **Address:** 375 18th Street Northwest, Atlanta, GA, 30363, US
- **Email:** john@test.com
- **Phone:** [8658880584](tel:8658880584)

[Send Message](#)

General Information

- **SVCID:** 17
- **Assignee:** NA
- **Due Date:** Tue, 11/05/2024 - 13:39 - Tue, 11/05/2024 - 14:39
- **Estimate Needed:** Yes

Assessment

Need to fix it

Please select if the service request needs an estimate and update status to Complete accordingly. If yes proceed to estimate or invoice work completed.

1

Estimate Work Order Project Invoice Photos

Estimate

ID	Estimate#	Title	Estimate Approval	Estimate Date	
295	28	AC isn't working	Approved	2024-11-16	Preview

Edit

Estimate Approved

Convert To Work Order

Convert To Project

Grand Total: \$300.00

General Information

- **EstimateID:** 41
- **Estimate Date**
Sat, 11/23/2024 - 12:00
- No service request referenced
- No work order referenced

Bill From

Acme Corp
11100 Parkside Dr, Knoxville, TN 37934
Knoxville, TN 37922
United States

Bill To

[Jerry Richards](#)
1010 U.S. 98
Destin, FL 32541
United States

1

Estimate Item Detail

#	Product	Qty	Price	Total
1	item3	50	6.00	300
			Sub Total	300
			Tax	0.00 %
			Tax Amount	0.00
			Grand Total	300

This is a sample sr

View Edit Delete Revisions

Work Order

Complete

+ Convert To Invoice

Pool motor making a noise.

The motor needs a pump

Contact Information

Jerry Richards

1010 U.S. 98
Destin, Florida, 32541

General Information

- **WOID:** 37
- **Assignee:** None
- **Due Date:** None

Resolution

Resolution

I installed the pump

You have added a resolution. Next update status to complete and create invoice.

Service Request Estimate Invoice Photos

Service Request

ID	Title	Assignee	Due Date	Status	
364	This is a sample sr	Jordan	2024-11-15 - 2024-11-15	Not Started	Preview

View



Scheduler

today < >

April 4, 2024

day 3 days week month

Team	5am	6am	7am	8am	9am	10am	11am	12pm	1pm	2pm	3pm	4pm	5pm	6pm	7pm
John Doe				█	█	█	█	█	█	█	█	█	█		
Billy Thomas			█	█	█	█	█	█	█	█	█	█	█		
John Doe				█	█	█	█	█	█	█	█	█	█		
wgoley06					█	█	█	█	█	█	█	█	█		
noaman_ilyas		█	█	█	█	█	█	█	█	█	█	█	█		
Jmorris1				█	█	█	█	█	█	█	█	█	█		

Work Orders

- wo test20
- wo test21
- Utilities and Landscaping
- Finishing
- Pool Opening
- Pool Closing
- wo test20
- wo test21
- Utilities and Landscaping
- Finishing
- Pool Opening
- Pool Closing
- Pool Closing

Scheduler

today < >

January 2024

day 3 days week month

Sun	Mon	Tue	Wed	Thu	Fri	Sat
31	1	2	3	4 8a Design	5 8a Foundation Work 10a Bathroom refinish	6
7	8 12a Installations 12a Installations	9	10	11 12a Utilities and Landscaping	12 12a Finishing	13
14	15	16 12a Installations 12a Installations	17	18	19	20
21 12a Installations	22	23	24	25	26 12a Installations	27
28	29 12a Installations	30	31 12a Installations	1	2	3 12a Installations
4	5	6	7	8	9	10

Work Orders

- Budget planning
- Sample
- Sample
- Sample
- Sample
- Sample

Invoice

Not Paid

Email Invoice

Pay Now

Grand Total: \$125.00

General Information

- Invoice ID: 37
- Due Date: 2024-11-22
- No service request referenced
- No estimate referenced

Bill From

Acme Corp

11100 Parkside Dr, Knoxville, TN 37934
Knoxville, TN 37922
United States

Bill To

Jerry Richards

1010 U.S. 98
Destin, FL 32541
United States

Invoice Item Detail

#	Product	Qty	Price	Total
1	item1	25	5.00	125
			Sub Total	125
			Tax	0.00 %
			Tax Amount	0.00
			Grand Total	125

Route Optimization

Routes

Route 1

TOTAL DISTANCE: 2165.77 MILES
TRAVEL TIME: 32 hrs:2.71670000000004mns

- 1 Location 345
200 Baltusrol Rd
Farragut TN 5.31 MILES
Details 0
- 2 Test Location Home
123 Park West Blvd
Knoxville TN 11.95 MILES
Details 0
- 3 Demo address1
10000 Noah Ln
Knoxville TN 13.34 MILES
Details Complete 1
- 4 Demo address4
8600 Tervada Dr

Map labels: Knoxville, Maryville, Sevierville, Pigeon Forge, Gatlinburg, Wears Valley, Loudon, Lenoir City, Alcoa, Eagleton Village, Binfield, Greenback, Vonore, Sweetwater, Madisonville, Dayton, Decatur, Clinton, Powell, Mascot, Jefferson City, White Pine, Dandridge, French Broad River, Beech Springs, Seymour, Hartford, Cherokee National F, Mount Guyot 6621 ft, Mount Le Conte 6593 ft, Clingmans Dome 6643 ft, Thunderhead Mountain, Sillers Bald 1709 m, Gregory Bald 1506 m, 5 miles, 10 km, © 2023 TomTom, © 2024 Microsoft Corporation Terms

View Edit

Open PDF

Set scale

Save file

Reset

Download

Measurements

Area		
Shape/Name	Area	Perimeter
Shape 1	0.58 SF	3.33 FT
Shape 2	0.66 SF	3.34 FT
Total:	1.24 SF	

Penetrations

Name	Qty
	0 EA

Snapping

1' 1/2' Freehand

Overview 1 2 3

Material - 1208m

Firepit

Shape 1 0.58sqft

Shape 2 0.66sqft

Color palette and thumbnails at the bottom.



Home



People



Work Order



Location



Asset



Project



Logout



Project

View Edit

Add Change Request Add Expense

Details

Customer:	adam jones
Project Team:	demo_user2, demo_user1
Project Timeline:	06/28/2023
Project Phases:	Planning, Design, Build, Inspect, Close

Completed

100%

Hours Worked: 102

Budget Spent: \$62,000 / \$130,000
Projected Net: \$88,780

Status

In Progress

Project

Summary

This is a sample project summary

Invoices

2

Work Items

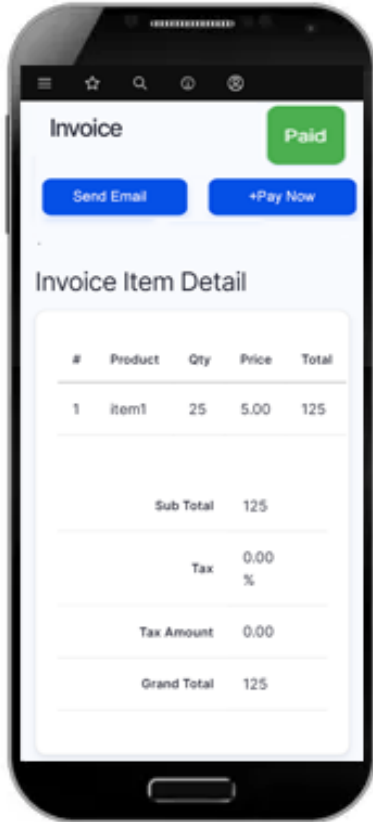
22

Change Orders

2

Project Documents

2



Get paid faster by allowing you field team the ability to collect payment while onsite.

Email or Text payment link to your customer

Tech Specs

Modern techstack managed and hosted in the cloud.

Infrastructure

- Cloud hosted platform
- 2 Data centers fully redundant
- Daily cloud backups
- Global CDN
- SLA for issue resolution

Software

- Progressive web app
- Built in modern web language
- Mobile first
- API integration
- Compatible with mobile browsers
- Offline capable

Security/Support

- GDPR compliant
- Multi-factor authentication
- PCI compliant partner
- 24/7/365 Readily Available Support
- Uptimes (99.99+%)

Additional **Benefits**

Information at your fingertips:

- Customer information
- Documents
- Photos
- Work history
- Warranty data
- ... and much more

1 Complete **30 min**
OnBoarding Process

2 App Configuration

3 In-app Training

4 Go to Work



Need a live Demo?

jfaddis@gsbxl.com

**Field Service Management software
for your service business..**