



PLANETPRESS CAPTURE USE CASE

Industry: Field Services

Business Form: Work Orders

Current situation

When customers call for service at the helpdesk of a commercial ventilation systems manufacturer, a service call is opened in the system and the information is transferred to the contracted maintenance company.

The maintenance company prints a three copy work order and hands it to the assigned technician. Once the technician completes the work at the client's site, he signs the work order, has the customer sign as well and leaves a copy for the client.

When the technician goes back to the office, he gives the second copy to the helpdesk who manually closes the service call in the system. Finally, the third copy of the work order is sent to accounting where a clerk produces the invoice and sends both documents to the manufacturer.

Challenges:

- **The client often misplaces his work order copy and requests a duplicate from the maintenance company. It can take days to retrieve the work order which causes problems.**
- **More than a week goes by between the maintenance and the production of the invoice.**
- **Work orders are lost or damaged creating delays and sometimes even preventing invoicing.**
- **Manual labor required for data entry, distribution, matching and filing of the documents is extensive and costly.**



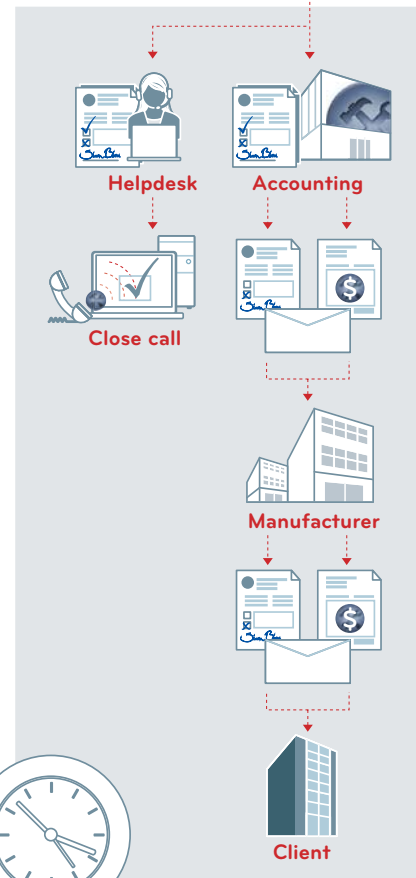
Manufacturer



Maintenance Company



Client



Up to a week

Solution: PlanetPress Suite

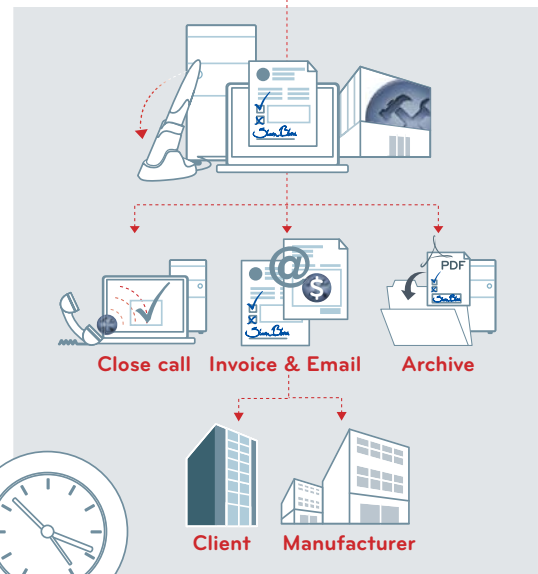
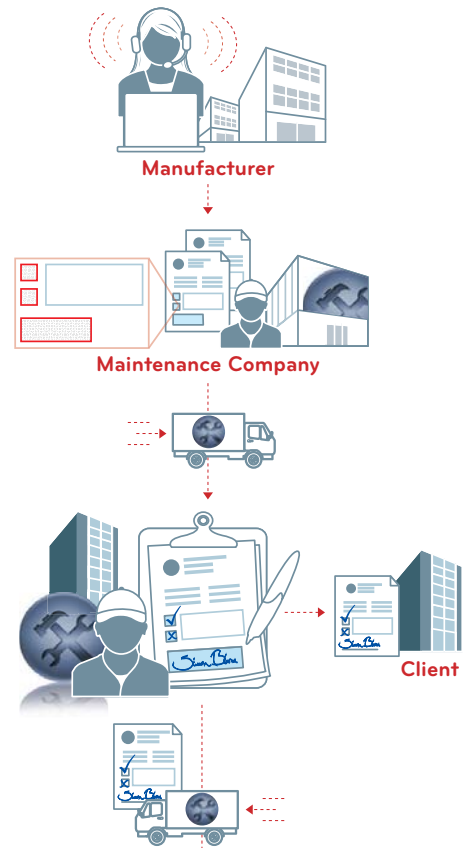
When notified of a service call, the maintenance company prints two copies of the work order with Anoto patterns in the signature zones and gives them to the assigned technician. Once the technician completes the work at the client's site, he signs the work order using the Anoto digital pen, has the customer sign as well and leaves a copy for the client.

When the technician goes back to the office, he docks the pen back in its cradle. The information, including the signatures, is automatically sent to the system and multiple processes are automatically triggered:

- A digital version of the signed work order is archived in the accounting system, prompting the creation of the invoice;
- The invoice and a copy of the work order are automatically sent by email to the manufacturer;
- A digital copy of the signed work order is sent by email to the client account for future reference;
- The work order is archived electronically in the maintenance company's archiving system;
- The service call is automatically closed in the maintenance system, with no human intervention.

Benefits:

- Delays caused by lost or misplaced work orders are completely eliminated.
- Once the Anoto digital pen is docked in its cradle, the invoice is automatically generated and sent by email to the manufacturer, which creates postal savings and eliminates delays.
- Automation eliminates issues caused by manual entry and handling of the work orders.
- The paper version of the signed work order is still filed and archived, to be used as back-up in case of IT problems or client reclamations.



Within a day

