

# Scheduling & Optimization

Empower dispatchers and planners to handle every scheduling scenario with maximum efficiency

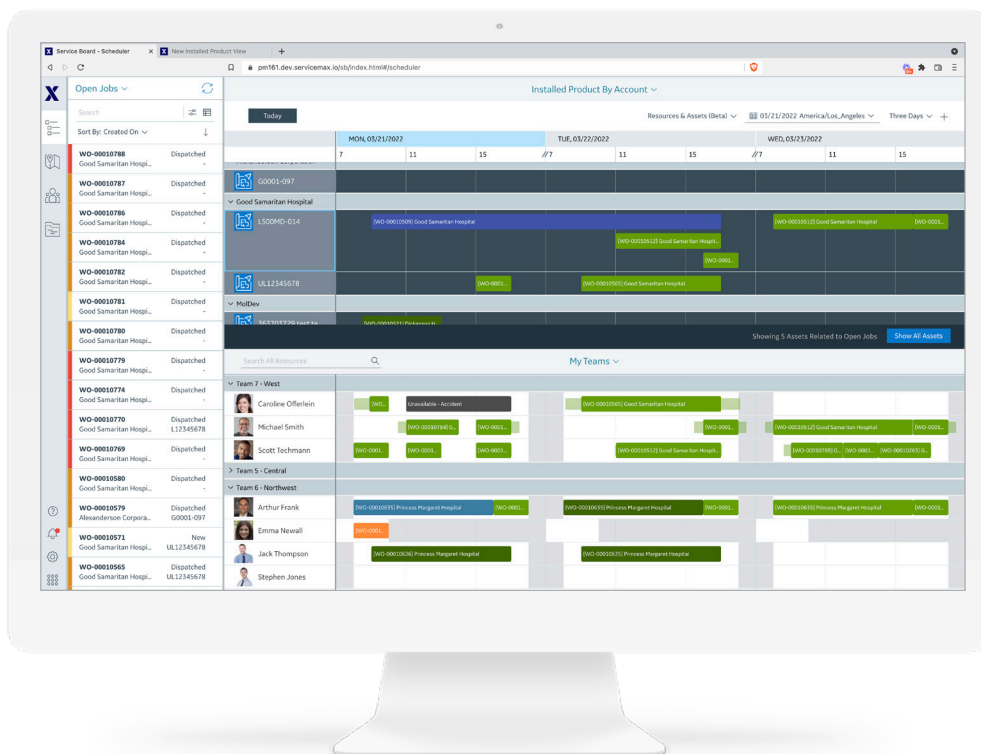


For service organizations, getting the right technician to the right job at the right time with the right parts and information is critical. It is the dispatcher's job to respond to incoming service requests and provide the best schedule to customers.

At the same time, dispatchers have to comply with business objectives and ensure field technicians are utilized efficiently; minimizing drive times and white space in their schedules. Dispatchers must quickly account for and balance technician availability, eligibility, service level commitments, skills, and parts inventory. As businesses grow, so does the scheduling complexity. To achieve best results for their customers and to ensure cost-effective service delivery, service organizations cannot rely on dispatcher experience alone. They must provide their dispatchers with the right tools and knowledge.

## Maximum resource efficiency for any service demand

Service Board, the premier scheduling environment from ServiceMax, supports all scheduling scenarios regardless of their complexity. Dispatchers and planners can draw on a rich set of features to efficiently plan, assign and schedule service work. With Service Board, dispatchers are always aware of what is going on in their territories, can quickly pinpoint relevant details, and confidently make scheduling decisions that are aligned with corporate goals and customer expectations. Combining Service Board with Schedule Optimization provides a higher degree of automation to augment the reach of the dispatchers and planners.



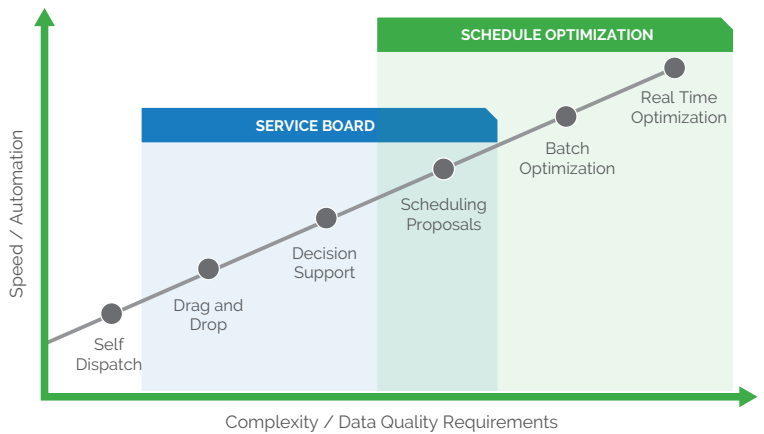
## ServiceMax Impact

**13%**  
decrease in  
mean time to repair

**15%**  
increase in  
first time fix rate

**22%**  
increase in  
technician utilization

Service Board supports all scheduling requirements as businesses grow



## Benefits:

- Maximize dispatcher and planner efficiency
- Improve technician utilization, and first-time fix rates
- Improves customer experience with better SLA compliance and First-Time-Fix rates

## Product Highlights:

- One-click Resource Recommendation
- Project Scheduling
- Powerful Search
- Long-Term Planning
- Asset-Centric Scheduling
- Map overlays of jobs and resources – enhanced with GPS tracking
- Seamless integration of Service Board, Schedule Optimization, and the ServiceMax Go and ServiceMax Engage mobile apps



Service Board brought us 90% productivity improvement as the response time is quite faster than Dispatch Console. Previously, it took around 1.5 minutes to assign one work order to a FE, but now it takes only 10 seconds. This is huge benefit for us. I'm also really excited to use GPS function on the tool because it has a huge opportunity to reduce Travel time of Field Engineers."

Shinji Kato, Japan Service Digital Transformation Leader, GE Healthcare

## Key Features and Capabilities

**With Service Board, dispatchers are always informed about jobs, resources, and environment.**

On the scheduler, they can leverage features such as:

- Configurable Fields
- Lifecycle Statuses
- Push Notifications
- Crew Management
- Visual Shift Schedule and Shift Exceptions
- Configurable Action Menu
- Message Center
- Resources & Assets View to see open and ongoing work for assets, grouped by account, location, and product

On the map interface, they can:

- Search jobs
- See resources and jobs grouped together
- Take in configurable popovers

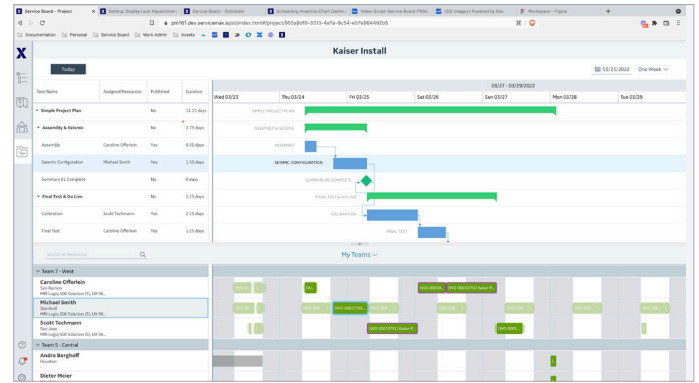
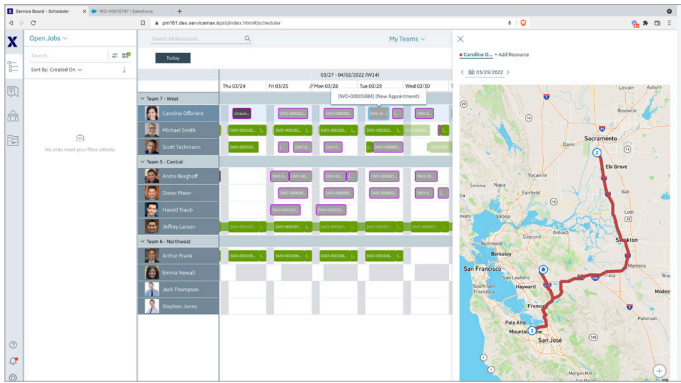
- Toggle map layers for displaying resources and jobs in map or satellite view
- View technician routes and track locations on demand
- Change the map provider

In the Crews section, they can:

- Search for resources
- Create Crews by adding resources with one click
- Compose Crews by determining crew leader and crew members

**Service Board 's scheduler features help dispatchers concentrate on what matters most.**

- Create and reuse personalized views
- Apply multi-variable filters
- Use a powerful Google-like search to quickly find relevant information



- Assign multiple technicians, crews or service teams to a job with Multi-Resource feature
- Group and align appointments
- Add multiple people to an event that is not related to a work order such as a training
- Pinpoint appointment or event on the scheduler
- Utilize the Job Table View to quickly sort and filter jobs
- Execute work order actions in bulk drag & drop
- Schedule long-cycle jobs with Automated Multi-Appointment Job\*

- Nearby Jobs to identify additional work for technicians based on their proximity to job site
- Long Term Planning\*
- Planning Mode to easily make adjustments before locking plans in

The Project tab enables dispatchers to use features such as:

- Propose Schedule\*
- Dependency Management
- Auto-creation of ServiceMax work orders

**With Service Board dispatchers can be confident to make the best possible decisions.**

The scheduler view gives them access to capabilities like:

- One-Click Resource Recommendation
- Automated Drive-Time Calculations
- Timezone Awareness
- Schedule Proposals to get suggestions for individual resources\*
- Accept/Decline Proposal
- Appointment Proposals\* to pick a work order date from a list of proposed time slots

**Schedule Optimization for**

- Fully automated work order scheduling – batch processing, and real-time processing
- Automated creation of optimized schedules and routes in real time, in alignment with the defined business objectives
- Auto-scheduling of long-term preventive maintenance jobs
- Prevent changes to scheduled work orders at a predetermined point in time before the job begins (Dispatch Threshold)
- Processing of automated service requests generated from IoT-devices

\*Powered by Schedule Optimization

**About PTC (NASDAQ: PTC)**

PTC unleashes industrial innovation with award-winning, market-proven solutions that enable companies to differentiate their products and services, improve operational excellence, and increase workforce productivity. With PTC, and its partner ecosystem, manufacturers can capitalize on the promise of today's new technology to drive digital transformation.

