

PRODUCT WORKFLOW STUDY

From service request to confirmed booking and visible job progress

A customer self-service workflow showing how Corexa can connect the request, site, machine, technician availability, booking confirmation and ongoing status in one traceable record.

Evidence level stated clearly throughout

Repository-reviewed

Capability basis

Customer-first

Primary experience

Machine-linked

Request context

Pilot required

Outcome standard



THE CHALLENGE

Why the existing process breaks down

Service requests often arrive by phone, email, social messages or a form that is not connected to the customer asset. The office must then identify the site, machine, urgency and suitable technician before a real booking can exist. Every manual handoff increases the chance of incomplete context or repeated customer contact.

01

Intake starts in the wrong channel

The request may begin in a message thread or voicemail that cannot carry structured machine, site and urgency information.

02

The affected machine is unclear

A customer can describe the symptom without identifying the exact asset, model or location that needs service.

03

Availability is negotiated manually

The office and customer exchange multiple calls or messages to find a suitable time and technician.

04

Booking status is ambiguous

A request, proposed time and confirmed booking can look the same when there is no visible status progression.

05

Deposits and approvals sit elsewhere

Commercial confirmation can be separated from the service record, leaving uncertainty about whether work should proceed.

06

Customers chase updates

Without a customer-facing view, the business receives avoidable calls asking whether a technician is booked or the job is progressing.

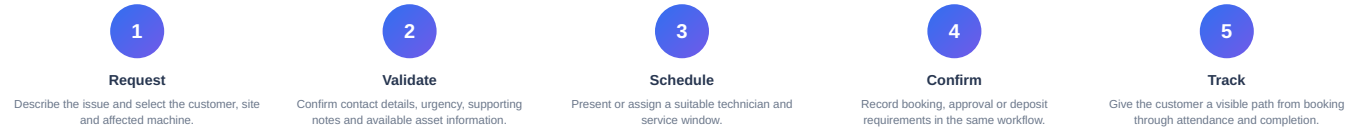
The central risk

A customer may believe service is booked while the business still lacks the asset context, technician commitment or payment confirmation needed to act.

THE OPERATING MODEL

A connected workflow around the machine

Corexa can preserve the customer request as it becomes a confirmed service event. The same record carries the customer, site, machine, requested work, booking state and later job progress.



COREXA CAPABILITY	OPERATIONAL CHANGE	WHY IT MATTERS
Customer portal request	Creates a structured service request rather than relying on an untracked message.	The office begins with consistent customer, site and problem information.
Machine-linked booking	Connects the request to a specific asset where one exists.	The technician receives context before the visit and the history remains asset-specific.
Technician availability	Supports customer-facing or internal selection of active, bookable technicians and time slots.	Scheduling requires fewer manual availability checks.
Status progression	Distinguishes request, booking, active work and completed states.	Customers and staff share a clearer understanding of what happens next.
Deposit and approval context	Keeps commercial confirmation visible beside the service event.	The business can avoid treating an unconfirmed enquiry as committed work.
Customer tracking view	Provides a token or portal-based view of relevant job progress.	Routine status questions can be answered without another phone call.

CREDIBILITY STANDARD

What is supported - and what is not yet claimed

A credible case study distinguishes repository evidence, real workflow scope and future outcome hypotheses. The evidence level below is deliberately explicit.

✓ Repository capability

The current Corexa repository includes customer job views, booking interfaces, technician calendars, availability settings and tracking routes.

✓ Workflow connection

Booking, customer, site, machine and job status are represented as connected product concepts rather than unrelated forms.

✓ Credible scope

This study describes the intended operating workflow visible in the product repository. It does not claim a measured reduction in booking time.

✓ Pilot requirement

A controlled customer-booking pilot is required to validate completion rates, administrative effort and customer behaviour.

Not yet claimed: this case study does not present a measured productivity, revenue, accuracy or customer-satisfaction improvement. A controlled baseline and participant-approved result are required before those claims are published.

Measurement plan for the publishable version

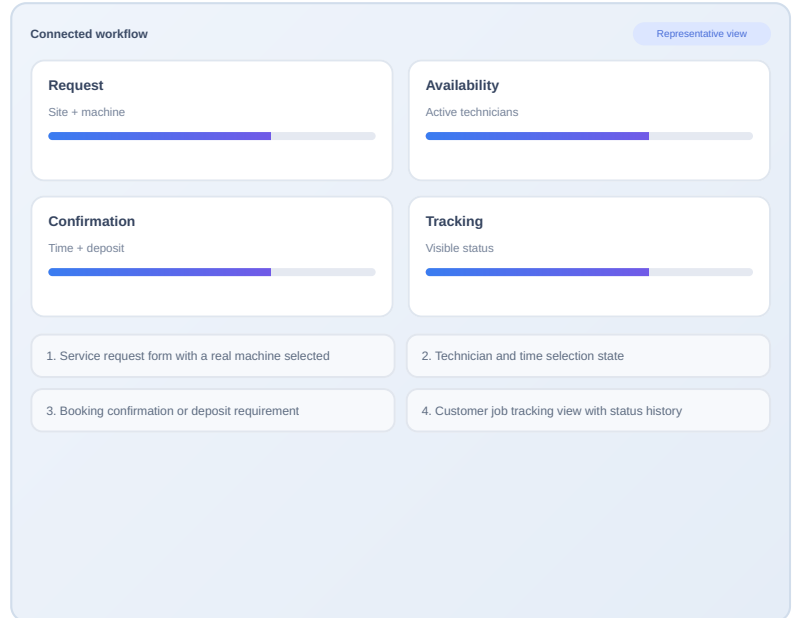
MEASURE	EVIDENCE SOURCE	CREDIBLE REPORTING
Booking completion rate	Portal analytics	Completed requests as a percentage of started requests.
Intake completeness	Required-field audit	Percentage of bookings with usable site, asset, contact and issue information.
Administrative handling time	Timed staff sample	Median office minutes from request receipt to confirmed booking.
Reschedule rate	Booking status history	Percentage of confirmed bookings moved before attendance.
Status enquiry volume	Calls, emails and messages	Customer status contacts per 100 active jobs.
Request-to-confirmation time	Timestamp comparison	Median elapsed time between submitted request and confirmed service time.

"A credible customer booking flow does not merely collect a form. It creates the first reliable version of the service record."

MAKE THE STORY TANGIBLE

Show the customer journey from request to tracked service

Use real customer-facing screenshots with precise captions. Show enough of each screen to prove the transition between request, booking, confirmation and status - not only isolated feature cards.



Recommended evidence-building sequence

Phase 1 - Baseline

Measure current phone, email and manual booking workload for a defined service segment.

Phase 2 - Controlled booking

Invite a limited customer group to use the portal while retaining staff oversight.

Phase 3 - Verified result

Compare completion, handling time, reschedules and status enquiries against baseline.

Build the publishable proof layer

Replace representative views with dated interface screenshots, a defined baseline, system-derived measures and an approved participant quotation.

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Publication note: capability descriptions are based on the Corexa repository supplied in July 2026. Confirm the deployed workflow, permissions, integrations and data quality before presenting a capability as a completed customer outcome.