

PRODUCT WORKFLOW STUDY

From unassigned request to a coordinated technician workday

A scheduling and dispatch workflow showing how Corexa can connect job priority, technician availability, central calendar visibility, field status and rescheduling.

Evidence level stated clearly throughout

Repository-reviewed

Capability basis

Central calendar

Dispatch view

Technician-first

Field handoff

Pilot required

Outcome standard



THE CHALLENGE

Why the existing process breaks down

Field-service scheduling is not only placing jobs into empty calendar spaces. The business must consider technician availability, job type, machine context, site access, urgency, travel, parts and work already in progress. When calendars and job status are disconnected, every change creates manual coordination.

01

Requests wait without ownership

A service request can exist without a clear technician, time or person accountable for the next action.

02

Calendars show time, not context

A generic event may omit the machine, fault, customer priority or required parts.

03

Availability is assumed

Working hours, leave and existing commitments may be checked manually or too late.

04

Urgent work disrupts the plan

Breakdowns are inserted without a consistent view of the jobs displaced or customers affected.

05

Field status becomes stale

The office cannot tell whether the technician is travelling, active, awaiting parts or finished.

06

Rescheduling multiplies messages

One time change may require separate updates to the technician, customer, calendar and job record.

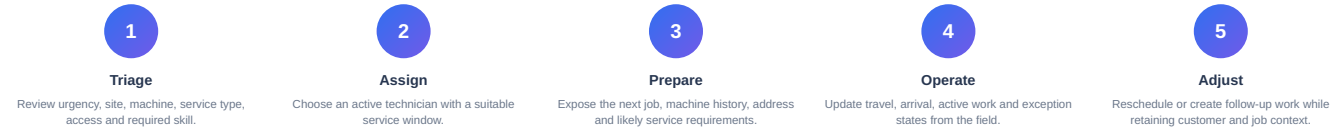
The central risk

The schedule appears organised while the underlying job ownership, customer expectation and technician work state remain inconsistent.

THE OPERATING MODEL

A connected workflow around the machine

Corexa can keep the service job as the source of truth while presenting it through central and technician calendars. Assignment, time, status and rescheduling remain connected to the customer, site and machine context.



COREXA CAPABILITY	OPERATIONAL CHANGE	WHY IT MATTERS
Central business calendar	Presents technician work in one management view.	Dispatch can compare people and commitments without switching individual calendars.
Unified event model	Combines maintenance and booking events with filtering and shared context.	Planned maintenance and customer bookings can be reviewed together.
Technician availability	Supports working days and time slots for bookable technicians.	Assignments can begin with explicit availability rather than assumption.
Technician next-job view	Surfaces customer, site, machine, time and key actions for the field user.	The schedule becomes an actionable work queue.
Job status controls	Tracks accepted, active, awaiting-parts, return-visit and completion states.	The office can distinguish schedule position from actual work progress.
Customer notification support	Provides location or status messaging pathways where configured.	A schedule change can be communicated from the operational record.

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 repository contains business calendars, technician booking calendars, unified calendar filtering, availability concepts and field job status workflows.

✓ Operational connection

Calendar events are linked to job and technician concepts rather than only static appointments.

✓ Credible limitation

This study does not claim automatic route optimisation or guaranteed arrival times. Those require travel data and verified operational logic.

✓ Pilot requirement

Schedule creation, travel, rescheduling and customer communication should be measured across a representative work period.

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
Request-to-assignment time	Job assignment timestamps	Median time from actionable request to named technician.
Unassigned job age	Open job register	Count and age of jobs without a technician or service time.
Schedule change rate	Calendar history	Changes per scheduled job and primary cause.
On-time arrival	Scheduled and arrival timestamps	Percentage of attended jobs beginning within the agreed window.
Technician utilisation	Calendar and active-work time	Proportion of available field time assigned and completed, interpreted with travel.
Customer notification completeness	Message log	Percentage of material schedule changes communicated through a recorded channel.

"A useful dispatch calendar explains who is going, where they are going, what machine they will see and what state the work is actually in."

MAKE THE STORY TANGIBLE

Show the same job through the office and technician views

Use a central calendar, the assigned job card and the technician mobile view for the same real service event. This proves that scheduling is a shared operational record, not duplicated calendar entry.



Connected workflow

Representative view

Triage

Urgency + skill

Calendar

Time + technician

Field

Next job + status

Change

Reschedule + notify

1. Central calendar with multiple technicians

2. Assignment panel showing job and machine context

3. Technician next-job mobile view

4. Rescheduled or follow-up job with status history

Recommended evidence-building sequence

Phase 1 - Observe

Measure assignment delay, unassigned jobs, travel assumptions and schedule changes for two weeks.

Phase 2 - Standardise

Use one assignment and status process for a selected technician group.

Phase 3 - Verify

Compare assignment speed, changes, on-time arrival and customer notification completeness.

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.