

PRODUCT WORKFLOW STUDY

From a new customer enquiry to a complete customer, site and machine operating record

An onboarding workflow showing how Corexa can establish the commercial relationship, service location and equipment context before the first technician visit.

Evidence level stated clearly throughout

Repository-reviewed

Capability basis

Customer onboarding

Primary workflow

Connected record

Operating model

Pilot required

Outcome standard



THE CHALLENGE

Why the existing process breaks down

New service relationships often begin with only a name, phone number and a vague machine description. If customer, site and asset information is not structured at the start, every later booking, quote, visit and invoice inherits uncertainty.

01

Customer and site are confused

A billing customer may operate several venues, while the service address and local contact differ from the account record.

02

Machine details arrive incomplete

Brand, model, serial number, installation date and equipment type may be unknown until the technician arrives.

03

Duplicate records are created

Staff may create another customer or site because existing records are difficult to find or inconsistently named.

04

Service preferences are lost

Opening hours, access instructions, purchase-order requirements and preferred contacts can remain in messages rather than the account.

05

The first job lacks context

The technician receives a symptom but not the operating environment, machine identity or site history.

06

Future reporting becomes unreliable

Incomplete hierarchy makes it difficult to report by customer, site, machine or contract later.

The central risk

A weak onboarding record forces every future workflow to rediscover the same customer, site and equipment information.

THE OPERATING MODEL

A connected workflow around the machine

Corexa can separate the customer, service site and machine while connecting them into one operating hierarchy. Required details can be added progressively without losing the relationship between the records.

1

Create customer

Confirm account identity, billing details and responsible contacts.

2

Add site

Record service address, opening hours, access and local contact information.

3

Register machine

Capture known equipment details, photographs and ownership.

4

Set preferences

Record service, communication, approval and invoicing requirements.

5

Launch first job

Create the request from the verified customer-site-machine context.

COREXA CAPABILITY	OPERATIONAL CHANGE	WHY IT MATTERS
Customer and site hierarchy	Separates the commercial account from each operating location.	Jobs and reporting can use the correct customer and service address.
Machine registration	Connects equipment identity to the correct owner and site.	The first visit begins a persistent machine history.
Contact management	Keeps billing, site and operational contacts distinguishable.	Messages and approvals reach the right person.
Site operating details	Stores access instructions, hours and location context.	Technicians arrive better prepared and avoid preventable delays.
Duplicate-aware search	Encourages locating existing records before creating new ones.	Customer and machine history is less likely to fragment.
Inline job creation	Starts the first request from the completed hierarchy.	The service workflow inherits verified context rather than free text.

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 supplied repository includes customer management, site creation and editing, machine registration, contact handling, customer portal and job-request components.

✓ Connected operating model

The workflow is designed to keep customer onboarding connected to the relevant machine, customer, site, job and responsible user.

✓ Credible limitation

A structured form cannot correct inaccurate source information by itself; identity and location still require human verification.

✓ Pilot requirement

A defined cohort should be measured from baseline through controlled use before any productivity, cost, revenue or satisfaction outcome is published.

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

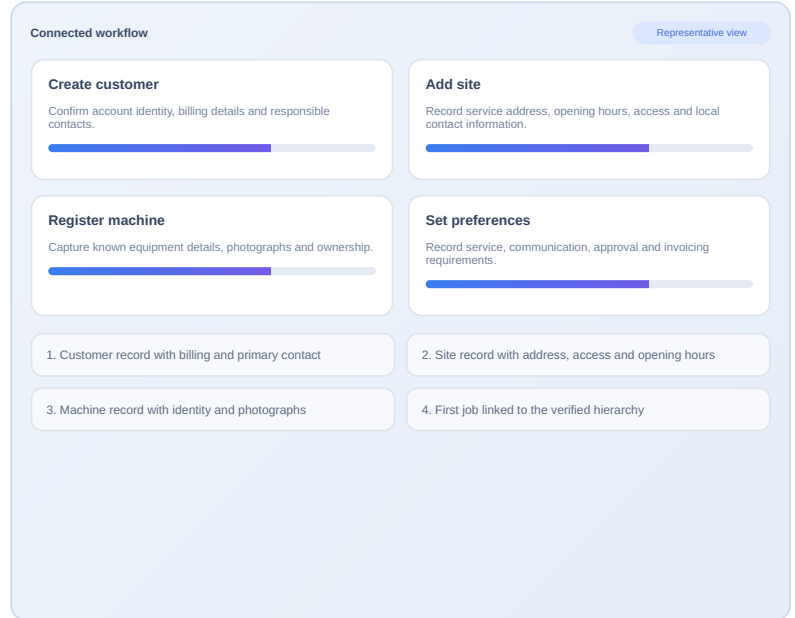
MEASURE	EVIDENCE SOURCE	CREDIBLE REPORTING
Complete onboarding rate	Customer, site and machine field audit	Percentage meeting the agreed minimum data standard.
Duplicate rate	Duplicate review	Potential duplicate customers, sites or machines per 100 onboardings.
First-job clarification	Call and message sample	Percentage of first jobs requiring missing-detail follow-up.
Machine identification	Technician arrival check	Percentage correctly identified before or at first attendance.
Onboarding cycle time	Creation timestamps	Median time from enquiry to service-ready record.
Contact accuracy	Delivery and approval logs	Percentage of communications reaching the intended contact.

"The first service job becomes easier when the customer, site and machine have already been made operationally real."

MAKE THE STORY TANGIBLE

Show one new account becoming service-ready

Use a single example from customer creation through site details, machine registration and the first job. Captions should show which uncertainty each screen removes.



Recommended evidence-building sequence

Phase 1 - Baseline Select a representative sample and record the current process, delays, errors and missing evidence.	Phase 2 - Controlled workflow Apply one agreed Corexa process, ownership rule and completion standard for 8-12 weeks.	Phase 3 - Verified result Report system-derived measures, dated screenshots and a participant-approved quotation.
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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.