



# Zinier Core Capabilities

## Field Service Elements (FSE)

*LAST UPDATED: 29/06/2021*

### **Confidentiality:**

- This document contains proprietary and confidential information owned by and under Zinier's copyright. No part of this document shall be reproduced, publicized, replicated, printed, used, or transmitted in any form, written, oral, or electronically with or without alteration without the written authorization from a duly authorized representative from Zinier. If you are not the intended recipient, please delete all copies.
- Zinier retains all title, ownership, and intellectual property rights to the material and trademarks contained herein, including but not limited to all supporting documentation, files, business, commercial, and marketing material, and multimedia.
- By accepting and reading this document, the recipient agrees to be bound by the aforementioned statement.

# Table of Contents

<b>Company Overview</b>	<b>5</b>
<b>Why Zinier</b>	<b>6</b>
Value Proposition and Benefits	7
<b>Zinier's Field Service Elements (FSE) Overview</b>	<b>9</b>
<b>Scheduling &amp; Dispatching</b>	<b>11</b>
Overview	11
Dispatch Console (New v2.8)	11
Calendar View (New v2.8)	12
Map View (New v2.8)	12
List View of Tasks	12
Open Tasks (Updated V2.6)	13
Dispatched Tasks (Updated V2.6)	14
Tasks Pending Review	14
Closed Tasks	14
View Work Order, Site Details & Services	15
Task Assignment	17
Manual Task Assignment (Updated V2.5)	17
Bulk Dispatch Tasks (Updated V2.8)	17
Task Review	19
Approve & Reject Tasks	20
Site Change Requests	21
Corrective Maintenance Requests	21
Manage Rejection Reasons	21
Technician Calendar View	22
Schedule & Dispatch Automation	22
Technician Recommendation	23
"Base" Recommendation Filters	24
Scheduling Optimization Methods	25
Scheduling Optimization Recommendations (New 2.10)	25
Recommendation: Long-Running Tasks (New 2.10)	25
Recommendation: Missed Scheduled Start Time (New 2.10)	25
Auto-Schedule Tasks	26
Filtering and Selecting Tasks (Updated 2.10)	27
View Auto Scheduling Logs (Updated 2.10)	28
Scheduling Settings (Updated 2.10)	28
<b>Mobile Field Service</b>	<b>30</b>

Mobile Workflow Steps	30
Workflow Actions (Mobile)	40
View Task Results (Web)	45
Task Review (Web)	47
Review Corrective Maintenance Task Requests (Web)	48
Closeout Package (Web)	49

**Backoffice Operations** **51**

Workforce Management (Users, Groups & Workforce)	51
Users	52
Manage Users	52
Groups	54
Technicians	55
Manage Technicians	56
Crews	59
Manage Crews	61
Web Users	62
Manage Web Users	63
Contractors	64
Manage Contractors	66
Work Groups	67
Manage Work Groups	67
Workforce Management Settings	69
Public Holidays	70
Regions / Sub-Regions	70
Work Order Management	71
Work Order	71
Manage Work Orders	72
Work Order Settings	73
Work Order Types (Updated V2.7)	74
Work Order Templates	74
SLAs	75
Service Windows	76
Tasks in Work Orders	77
Manage Tasks	77
Create Task Dependencies	79
(New V2.5)	79
Task Type Settings	79
Manage Task Types	81
Define Task Type Services	83
Define Required Skills and Skill Levels for a Task Type	83
Assets & Inventory	84
Assets (Updated V2.10)	84

Manage Assets at Customer Sites (Updated V2.10)	85
Asset Logs (New V2.10)	85
Stock Locations	86
Manage Stock Locations	87
Parts & Material Inventory	87
Managing Inventory	88
Catalogs & Services	90
Parts, Assets & Materials Catalogs	91
Manufacturers Catalog	92
Manage Manufacturers Catalog	93
Service Catalog	93
Manage Services	94
Asset Categories	95
Tax Categories	95
Stock Units	95
Customer Management	96
Customers	96
Manage Customers	97
Customer Sites	97
Manage Customer Sites	99
Manage Regions / Sub-regions	100
Manage Contracts	101
Manage SLAs	102
Manage Service Windows	103
Manage Public Holidays	103
Reporting & Dashboards	105
Zinier Dashboards	105
Standard Dashboard Capabilities	105
Standard Chart Types (Widgets)	106
Advanced Dashboards	107



# Company Overview

Zinier is a Low-code Field Service Automation Platform, Powered by AI.

Field service leaders today live in a world of complexities -- managing in-house and outsourced workforces, complex service delivery processes, and a patchwork of legacy technology solutions.

Zinier does away with all of that, empowering field service teams to deliver an unparalleled experience for customers. Zinier is a cloud-based, end-to-end field service management platform for large organizations, helping them:

- Put the right work, in front of the right people, at the right time
- Ensure high-quality service delivery across their entire mobile workforce
- Easily create, deploy, and manage powerful, automated workflows
- Know how their entire workforce is performing, in-house or outsourced

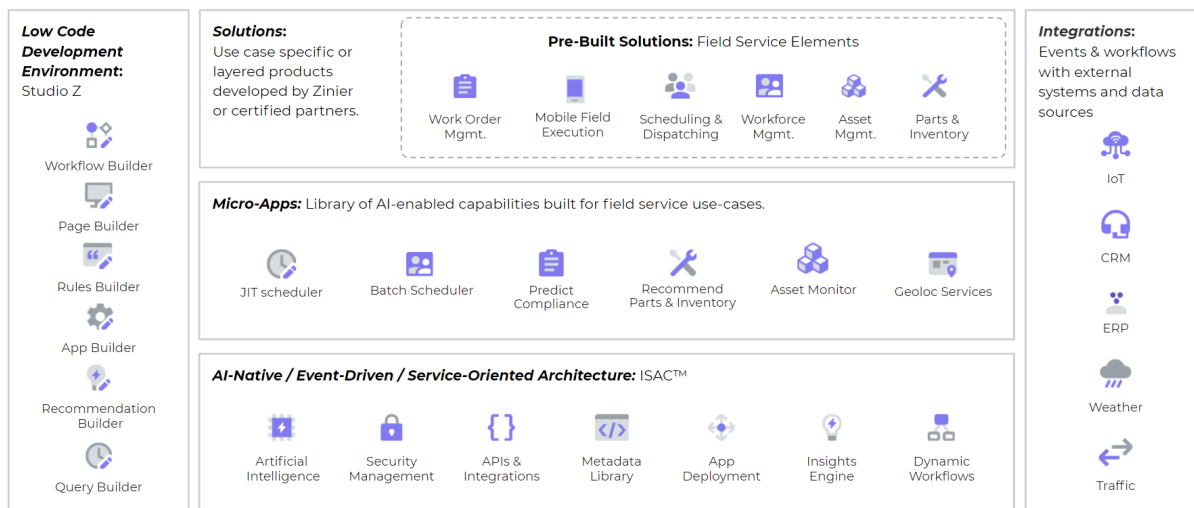
We empower field service organizations to deliver always-on service now, while future-proofing for the long term. Our platform is AI-native, configurable, and accessible - enabling teams to work smarter and focus on uniquely human tasks.

Zinier is a privately-held company based in Silicon Valley, with strong financial backing from the same investors as groundbreaking companies such as Facebook and Spotify. Zinier also has offices in Singapore, Bengaluru, London, and Mexico City.

# Why Zinier

Zinier helps field service operations teams use AI-driven automation to drive productivity, increase visibility into the field, fix things before they break, and deliver better customer experiences. Zinier is the partner to go to be the transformation partner and make your organization future-proof. Our solutions are built on top of a native and open platform to provide you with the advantage of flexible integration, cloud-ready, and scalable to meet the needs of your organization.

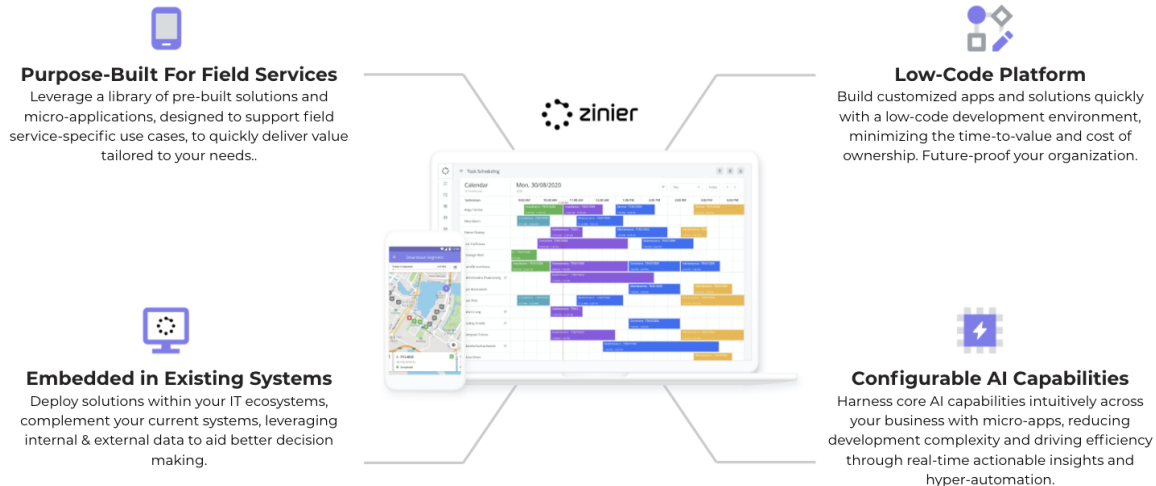
The diagram below provides an overview of Zinier's platform.



Zinier platform

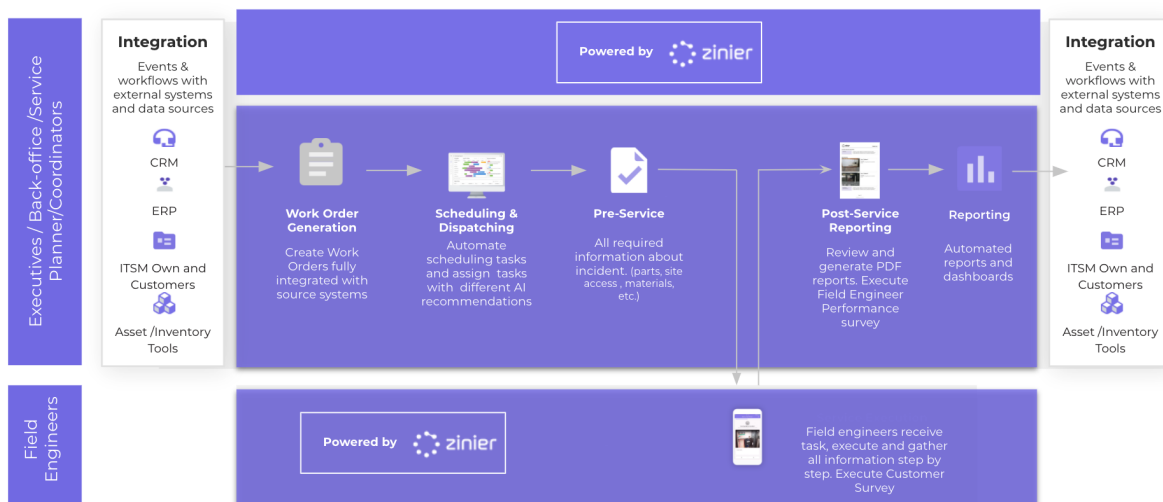
At Zinier, we are dedicated to bringing key value to our customers through:

- **Industry's First Low-Code Platform for Field Services** Build customized apps and solutions quickly with a low-code development environment, minimizing the time-to-value and cost of ownership. Future-proof your organization.
- **Purpose-Built For Field Services** Leverage a library of pre-built solutions and micro-applications, designed to support field service-specific use cases, to quickly deliver value tailored to your needs.
- **Configurable AI Capabilities** Harness core AI capabilities intuitively across your business with micro-apps, reducing development complexity and driving efficiency through real-time actionable insights and hyper-automation.
- **Embedded in Existing Systems** Deploy solutions within your IT ecosystems, complement your current systems, leveraging internal & external data to aid better decision making.



## Value Proposition and Benefits

Using Zinier field service automation platform, you will be able to transform its field service operations. Back-office and management teams will be enabled with field purpose-built capabilities to automate their daily work while the field force will be empowered with digitized mobile workflows as illustrated below



- **End-to-end Automation:** Work Orders will be integrated from source systems, automatic scheduling and re-scheduled using AI/ML recommendations with variables considered such as distance optimization constraints, data captured digitally from the field teams considering criteria such as SLA, skills, parts, tools, and materials.
- **Complete more tasks and deliver higher-quality service:** Increase first-time fix rates by automatically assigning the right technician to each task, based on skills and proximity. Reduce SLA breaches by automatically re-assigning jobs when a technician is running behind. Deliver just-in-time service by tracking technicians and parts on-hand in real-time.

Execute customer services by the field engineers at customer sites, as well as run performance surveys of field engineers by managers, service planners, coordinators, or anyone in the back office.

- **Clear visibility in the field:** Monitor the overall performance of field teams and equipment, then drill down to each site and technician to complete the picture. Visualize the metrics you care about most with custom dashboards for every level of your organization.
- **Turn insights into action:** Drive operational efficiency by monitoring the performance of all field teams and assets, then automating best practices. Unlike legacy solutions that can take months to update, Zinier platform was built with speed and flexibility in mind. Using our workflow builder, you can change the workflow in minutes and push it to every technician's mobile device.
- **Empower your field teams:** Be as prescriptive as needed with detailed site records and step-by-step mobile workflow to guide technicians through each task. Easily verify job accuracy with annotated photo capturing and automatic approval workflows. Turn every technician into an expert with an on-demand Knowledge Library, even in areas with low to no network connectivity.

# Zinier's Field Service Elements (FSE)

## Overview

Zinier's Field Service Elements is a pre-built solution that comes with Zinier's platform in order to automate the entire field service value chain. The product is classified into three distinct areas:

- **Scheduling & Dispatching:** Assign, schedule and dispatch the tasks based on multiple attributes such as skill requirements, region, and real-time location details in a single dispatch console. Advanced scheduling algorithms like Just-in-Time Scheduler, Batch Scheduler to facilitate resource and task prioritization based on real-time operational activities. A centralized dispatch console with task viewing capabilities in the map, calendar, and GANNT charts.
  
- **Technician-Centric Field Mobility:** Simple and intuitive mobile application to standardize and digitize workflows for field technicians and crews. Native iOS and Android mobile application with support for low/no-connectivity environments, multi-language, and digital information capture from the field. Reliable and robust mobility solution for field resources to enable them to do their job.
  
- **Back-office Operations:**
  - *Unified Workforce Management:* Manage in-house and contracted technicians and crews, factoring in each technicians' unique skills, experience, and availability, and keep track of your workforce by project, crew, region, etc. Efficiently manage technicians and back-office staff in one easy-to-use console to add, edit, invite, activate, and deactivate users. Create and manage crews and contractors in order to assign multiple technicians to tasks.
  - *Work Order Management:* Create and prioritize work orders, view work order information such as service levels, customer, and type of work, and track the status of all work orders down to each individual associated task. Standardized task execution through templated work orders, predefined tasks, and capture of all relevant information (site, task, parts, etc.) necessary to complete the Work Order. Track use of parts, costs, consumables, and resources needed to complete tasks associated with work orders.

- *End-to-End Asset Management*: Track the status of your installed assets at each customer site as well as monitor the quantity and location of parts and materials across warehouses and trucks. Our module stores critical asset information (i.e., serial number, contract, customer, site location, and date of purchase of an Asset) but can also be used to track, assess, manage, and optimize your assets.
  - *Real-Time Reporting & Dashboards*: View field data from all sources (mobile app, integrated external systems, etc.) in dynamic charts and graphs. Easily monitor performance and status of all teams and critical KPIs to proactively manage operations based on real-time inputs.
-

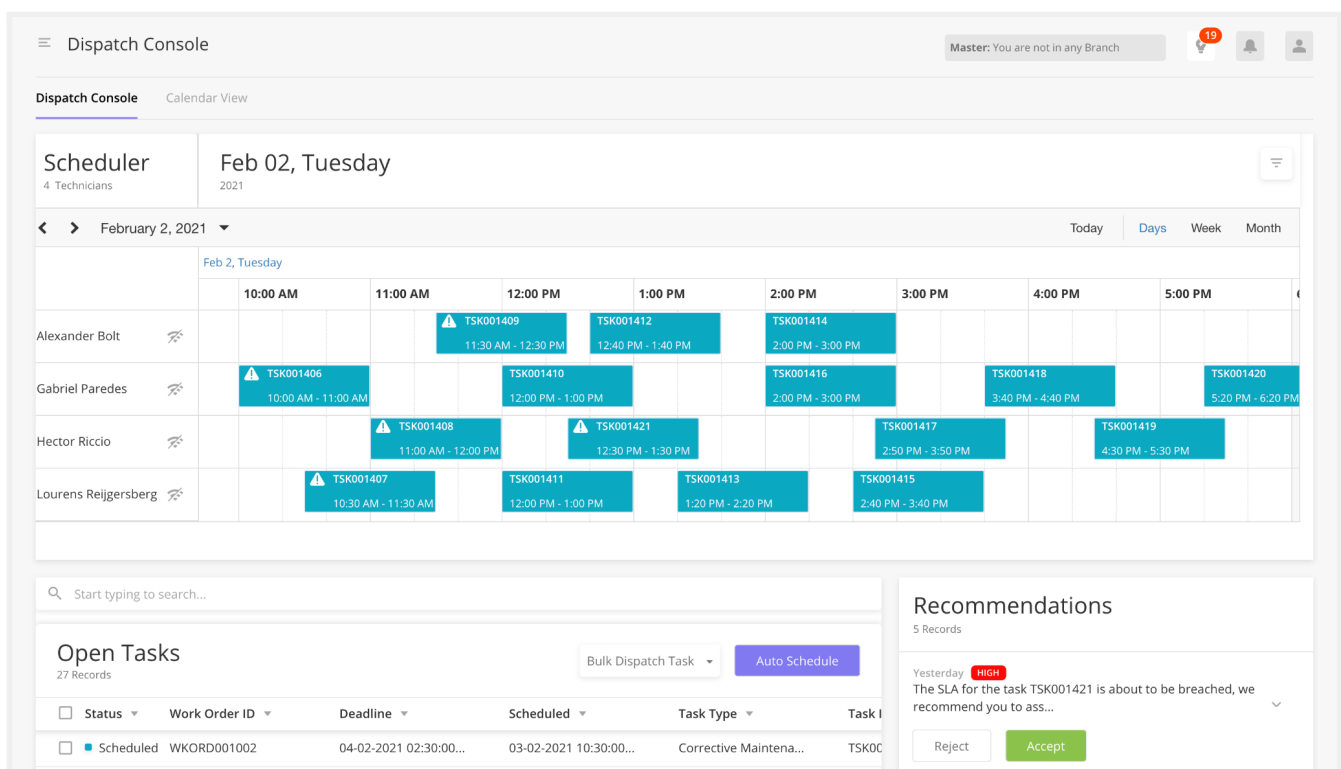
# Scheduling & Dispatching

## Overview

Task scheduling lets you assign, schedule, and dispatch the Tasks you add to a Work Order. Zinier Field Service Elements has a powerful Tech Recommendation engine that can assist you when scheduling and dispatching tasks. The engine can take into account multiple attributes and skill requirements when assigning a user to a specific type of task and location.

## Dispatch Console (New v2.8)

Three-panel view of the calendar, active tasks, and recommendations. This is intended to be the primary view dispatchers use to do most of their daily work including scheduling (manual or automated), dispatching (one by one or in bulk), and staying up to date with anomalies via recommendations. More information on recommendations can be found in the Automation section of this document.



The screenshot displays the Dispatch Console interface. At the top, it shows 'Dispatch Console' and a notification 'Master: You are not in any Branch'. Below this, the 'Scheduler' section is set to 'Feb 02, Tuesday' for '4 Technicians'. The main area is a calendar grid for February 2, 2021, showing task assignments for Alexander Bolt, Gabriel Paredes, Hector Riccio, and Lourens Reijgersberg. Tasks are represented by blue blocks with times and IDs, some with warning icons. Below the calendar, there is a search bar and an 'Open Tasks' table with 27 records. The table has columns for Status, Work Order ID, Deadline, Scheduled, Task Type, and Task ID. A 'Recommendations' panel on the right shows 5 records, including a high-priority warning about an SLA breach for task TSK001421, with 'Reject' and 'Accept' buttons.

## Calendar View (New v2.8)

Full page calendar view where dispatchers can see a visual representation of the schedule while also being able to schedule, assign, and dispatch tasks. (See more information below in the Technician Calendar View section)

## Map View (New v2.8)

A map view to see a visual representation of task locations and technicians.

The screenshot displays the Zinier Task Scheduling interface. On the left is a navigation sidebar with options like Dashboards, Workforce, Projects, Work Orders, Task Scheduling (selected), Dispatch Console, List View, Map View (highlighted), Inventory, Assets, Customers, Catalog, Settings, and Demo. The main area is titled 'Task Scheduling' and features a map of Singapore. A popup window is open over a task location, showing details for 'Tech Amsterdam LR AMS T' assigned to technician 'Sophia Willes'. The popup includes fields for Contractor, Region, Last Seen (04-19-2021 19:21:36.000), Scheduled Start Date (06-28 07:15:00.000), and Task Status (Scheduled). Below the map is a search bar and a table of 'Open Tasks' (64 Records). The table has columns for Status, Work Order ID, Deadline, Scheduled, Task Type, and Task ID. Three tasks are listed: one In Progress, one Open, and one Pending Review.

Status	Work Order ID	Deadline	Scheduled	Task Type	Task ID
In Progress	WKORD002235	25-06-2021 03:20:13...	25-06-2021 09:00:00...	Corrective Maintena...	TSK002295
Open	WKORD002237	27-06-2021 07:21:29...	25-06-2021 05:22:16...	Fiber Splicing	TSK002297
Pending Review	WKORD002233	25-06-2021 03:09:02...	25-06-2021 02:00:00...	Corrective Maintena...	TSK002293

## List View of Tasks

View tasks grouped by status to quickly understand what needs your attention. Tasks are grouped by the following navigation tabs/modules:



Status	Work Order ID	Deadline	Scheduled	Task Type	Task ID	Technician
Scheduled	WKORD000154	11-08-2020 05:00:00	11-08-2020 01:23:24	Corrective Maintenance	TSK000470	Arun Chetty
Open	WKORD000154	11-08-2020 05:00:00	11-08-2020 01:04:44	Corrective Maintenance	TSK000471	
Scheduled	WKORD000154	11-08-2020 05:00:00	11-08-2020 12:37:33	Corrective Maintenance	TSK000472	Jose Rabadan
Scheduled	WKORD000154	11-08-2020 05:00:00	11-08-2020 03:20:51	Corrective Maintenance	TSK000473	Jose Rabadan
Scheduled	WKORD000154	11-08-2020 05:00:00	11-08-2020 03:55:01	Corrective Maintenance	TSK000474	Arun Chetty
Open	WKORD000154	11-08-2020 05:00:00	11-08-2020 03:01:15	Corrective Maintenance	TSK000475	
Open	WKORD000154	11-08-2020 05:00:00	11-08-2020 04:50:28	Corrective Maintenance	TSK000476	
Open	WKORD000154	11-08-2020 05:00:00	11-08-2020 04:36:20	Corrective Maintenance	TSK000477	
Scheduled	WKORD000154	11-08-2020 05:00:00	10-08-2020 11:00:00	Corrective Maintenance	TSK000465	Arun Chetty
Open	WKORD000154	11-08-2020 05:00:00	11-08-2020 04:33:16	Corrective Maintenance	TSK000478	
Scheduled	WKORD000154	11-08-2020 05:00:00	10-08-2020 09:05:00	Corrective Maintenance	TSK000466	Jaime Juan
Scheduled	WKORD000154	11-08-2020 05:00:00	11-08-2020 01:54:19	Corrective Maintenance	TSK000479	Jaime Juan
Scheduled	WKORD000154	11-08-2020 05:00:00	11-08-2020 03:05:30	Corrective Maintenance	TSK000467	Jaime Juan
Scheduled	WKORD000154	11-08-2020 05:00:00	11-08-2020 12:05:13	Corrective Maintenance	TSK000468	Jaime Juan

## Open Tasks (Updated V2.6)

Where you schedule, assign and dispatch tasks. This module contains tasks with the following statuses:

- **Open tasks** - Tasks that have not yet been scheduled or assigned.
- **Scheduled** - Tasks have been assigned and scheduled but not yet dispatched, and not visible to a tech yet.
- **Reopened** - Tasks that have been rejected and need to be reassigned to another. More details on task review can be found in the task review section.

From here you can dispatch tasks either via row action from the main grid or by opening the side panel to review information first.

## Dispatched Tasks (Updated V2.6)

Where you can view dispatched tasks that are still in progress. This module contains tasks with the following statuses:

- **Dispatched** - Tasks have been sent to the assigned tech and are viewable on the tech's mobile device. But the tech has yet to start/check-in to the site.
  - **In Transit** - Tasks where the tech has clicked the start travel at the start of the mobile workflow.
  - **In Progress** - Tasks are those where the tech has checked in to the site. The check-in by default is enforced by geofence with a radius of 500 meters from the site coordinates.
  - **Delayed** - A task delay is reported by the tech. Details of the delay can be viewed in the side panel.
  - **Incident** - An incident is reported by the tech. Details of the incident can be viewed in the side panel.
- 

## Tasks Pending Review

Where you can view tasks that have been submitted for review. This module contains tasks with the following statuses:

- **Pending Review** - Tasks that have been completed in the field and submitted for review.
  - **Site Change Request** - Tasks that are submitted when a tech has discovered that the site address needs to be updated.
- 

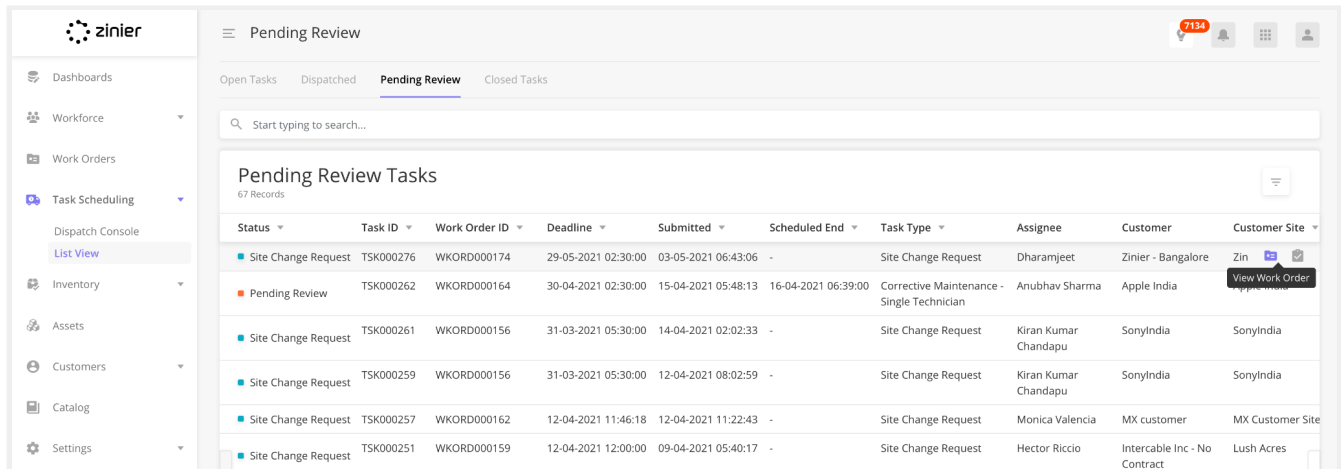
## Closed Tasks

Where you can view historical data on completed and canceled tasks. This module contains tasks with the following statuses:

- **Completed** - tasks that have been completed, reviewed, and approved.
  - **Canceled** - tasks are those that have been canceled.
-

## View Work Order, Site Details & Services

Different side panels with details about the Work Order and Task can be viewed throughout the List Views of Tasks.



**Pending Review** 7134

Open Tasks | Dispatched | **Pending Review** | Closed Tasks

Search: Start typing to search...

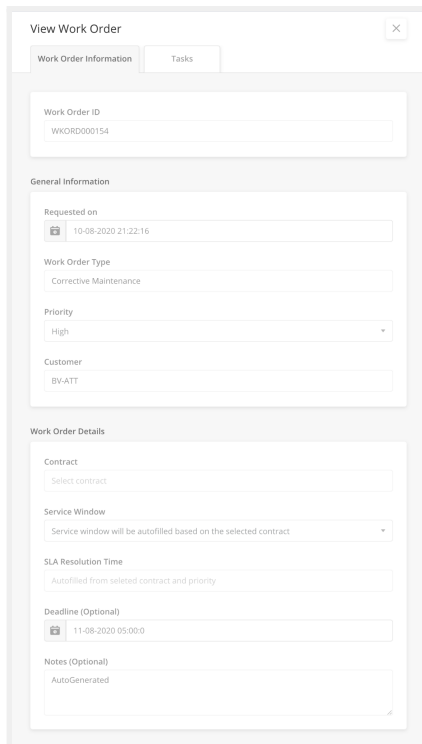
### Pending Review Tasks

67 Records

Status	Task ID	Work Order ID	Deadline	Submitted	Scheduled End	Task Type	Assignee	Customer	Customer Site
Site Change Request	TSK000276	WKORD000174	29-05-2021 02:30:00	03-05-2021 06:43:06	-	Site Change Request	Dharamjeet	Zinier - Bangalore	Zin
Pending Review	TSK000262	WKORD000164	30-04-2021 02:30:00	15-04-2021 05:48:13	16-04-2021 06:39:00	Corrective Maintenance - Single Technician	Anubhav Sharma	Apple India	Apple India
Site Change Request	TSK000261	WKORD000156	31-03-2021 05:30:00	14-04-2021 02:02:33	-	Site Change Request	Kiran Kumar Chandapu	SonyIndia	SonyIndia
Site Change Request	TSK000259	WKORD000156	31-03-2021 05:30:00	12-04-2021 08:02:59	-	Site Change Request	Kiran Kumar Chandapu	SonyIndia	SonyIndia
Site Change Request	TSK000257	WKORD000162	12-04-2021 11:46:18	12-04-2021 11:22:43	-	Site Change Request	Monica Valencia	MX customer	MX Customer Site
Site Change Request	TSK000251	WKORD000159	12-04-2021 12:00:00	09-04-2021 05:40:17	-	Site Change Request	Hector Riccio	Intercable Inc - No Contract	Lush Acres

## View Work Order Details

View the full Work Order details associated with the task.



**View Work Order**

Work Order Information

Work Order ID: WKORD00154

General Information

Requested on: 10-08-2020 21:22:16

Work Order Type: Corrective Maintenance

Priority: High

Customer: BV-ATT

Work Order Details

Contract: Select contract

Service Window: Service window will be autofilled based on the selected contract

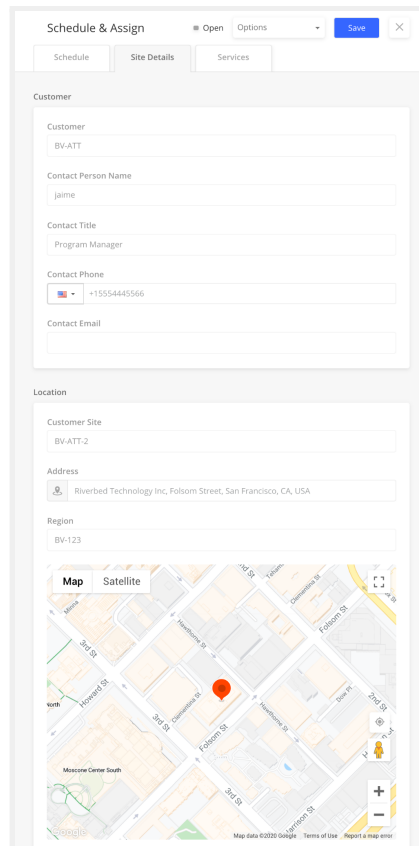
SLA Resolution Time: Autofilled from selected contract and priority

Deadline (Optional): 11-08-2020 05:00:0

Notes (Optional): AutoGenerated

## View Site Details

View details about the Site to which the task is assigned including the contact person and location (map and address)



**Schedule & Assign**

Schedule | Site Details | Services

Customer

Customer: BV-ATT

Contact Person Name: Jaime

Contact Title: Program Manager

Contact Phone: +15554445566

Contact Email:

Location

Customer Site: BV-ATT-2

Address: Riverbed Technology Inc, Folsom Street, San Francisco, CA, USA

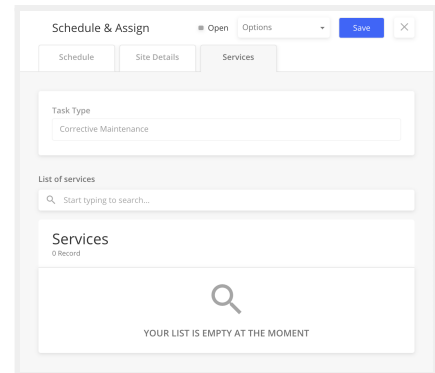
Region: BV-123

Map | Satellite

Map data ©2020 Google

## View Services

View the Services associated with the Task.



**Schedule & Assign**

Schedule | Site Details | Services

Task Type: Corrective Maintenance

List of services

Start typing to search...

Services

0 Record

YOUR LIST IS EMPTY AT THE MOMENT

# Task Assignment

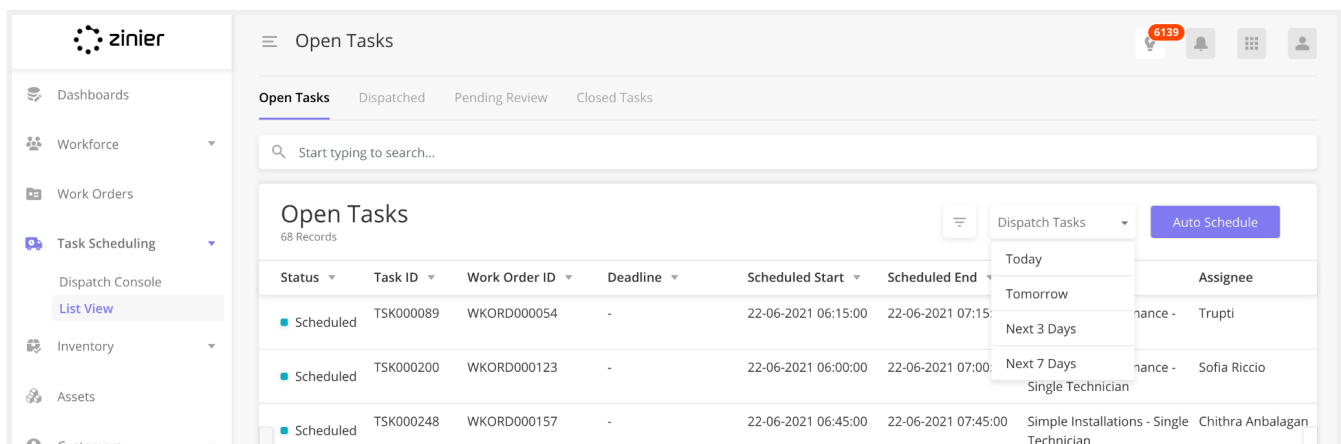
## Manual Task Assignment (Updated V2.5)

Manually assign tasks to a single technician of your choice from the side panels in List View - Open Tasks or the Dispatch Console modules.

## Bulk Dispatch Tasks (Updated V2.8)

Dispatch tasks to technicians in bulk for a fixed time range from the List View - Open Tasks or the Dispatch Console modules.

- Today** - Dispatches all Scheduled tasks with a scheduled start time for the current calendar day based on the time zone of the Dispatcher. Example: It's currently Feb 22nd, 17:10. All tasks are dispatched which are scheduled between 17:10 and 23:59 on the 22nd.
- Tomorrow** - Dispatches all Scheduled tasks with a scheduled start time for the next calendar day (between 00:00 and 23:59). Any tasks scheduled for the current day (Today) are not dispatched!
- Next 3 days** - Dispatches all tasks with a scheduled start time within the next 3 calendar days (including the current day). Today, Tomorrow, Day After Tomorrow.
- Next 7 days** - Dispatches all tasks with a scheduled start time within the next 7 calendar days (including the current day). Starting from the current date to 23:59 on the 7th day.



The screenshot shows the 'Open Tasks' interface in the Zinier system. It features a sidebar with navigation options like Dashboards, Workforce, Work Orders, Task Scheduling, Dispatch Console, Inventory, Assets, and Customers. The main area displays a table of tasks with columns for Status, Task ID, Work Order ID, Deadline, Scheduled Start, and Scheduled End. A 'Dispatch Tasks' dropdown menu is open, showing options for Today, Tomorrow, Next 3 Days, and Next 7 Days. The 'Assignee' column shows names like Trupti and Sofia Riccio. A search bar and an 'Auto Schedule' button are also visible.

Status	Task ID	Work Order ID	Deadline	Scheduled Start	Scheduled End	Assignee
Scheduled	TSK000089	WKORD00054	-	22-06-2021 06:15:00	22-06-2021 07:15:00	nance - Trupti
Scheduled	TSK000200	WKORD000123	-	22-06-2021 06:00:00	22-06-2021 07:00:00	nance - Sofia Riccio
Scheduled	TSK000248	WKORD000157	-	22-06-2021 06:45:00	22-06-2021 07:45:00	Simple Installations - Single Technician Chithra Anbalagan

**Recall a Task** - Web users can recall a dispatched task if they need to reassign it to another tech or change the scheduled time, etc. Doing so will notify the assigned technician, remove the task from the tech's task list on the mobile app and move the task to the "Open" module with stats = "Open"

**Cancel a Task** - Web users can cancel a task that is no longer needed. Doing so will notify the assigned technician, remove the task from the tech's task list and move the task to the "Closed" module with stats = "Cancelled"

**Delete a Task** - In the event that a task is no longer valid, web users can delete it. Delete functionality is only available for Cancelled or Completed Tasks. Doing so will remove the task from all Task modules.

Schedule & Assign
Open
Options
Save
✕

Schedule

Site Details

Serv

Dispatch Task  
 Cancel Task

**Schedule**

Deadline

Scheduled Start Date

Estimated Task Duration (In minutes)

**Technician**

Assign Technician  ✕ ▼ View Technicians

**Task Details**

Task ID

Task Type

Work Order ID

Work Order Type

Priority

Customer Site

Notes (Optional)

# Task Review

From the Pending Review section, reviewers can see tasks that have been completed in the field and submitted for review. The Task Review side panel shows all of the data captured in the field as part of the task workflow (photo evidence, data captured in input fields, notes, customer signature, etc.). From here the reviewer has the option to Approve or Reject a task.

Status	Task ID	Work Order ID	Deadline	Submitted	Scheduled End	Task Type	Assignee	Customer	Customer Site	Region
Site Change Request	TSK000276	WKORD000174	29-05-2021 02:30:00	03-05-2021 06:43:06	-	Site Change Request	Dharamjeet	Zinier - Bangalore	Zinier - Bangalore	West
Pending Review	TSK000262	WKORD000164	30-04-2021 02:30:00	15-04-2021 05:48:13	16-04-2021 06:39:00	Corrective Maintenance - Single Technician	Anubhav Sharma	Apple India	Apple India	Region
Site Change Request	TSK000261	WKORD000156	31-03-2021 05:30:00	14-04-2021 02:02:33	-	Site Change Request	Kiran Kumar ChandapuSonyIndia	SonyIndia	SonyIndia	South
Site Change Request	TSK000259	WKORD000156	31-03-2021 05:30:00	12-04-2021 08:02:59	-	Site Change Request	Kiran Kumar ChandapuSonyIndia	SonyIndia	SonyIndia	South
Site Change Request	TSK000257	WKORD000162	12-04-2021 11:46:18	12-04-2021 11:22:43	-	Site Change Request	Monica Valencia	MX customer	MX Customer Site 1	MX region
Site Change Request	TSK000251	WKORD000159	12-04-2021 12:00:00	09-04-2021 05:40:17	-	Site Change Request	Hector Riccio	Intercable Inc - No Contract	Lush Acres	North
Site Change Request	TSK000247	WKORD000156	31-03-2021 05:30:00	31-03-2021 05:17:49	-	Site Change Request	Kiran Kumar ChandapuSonyIndia	SonyIndia	SonyIndia	South

An example of viewing Tasks Results after the technician has submitted it using the Zinier Mobile App.

← Solar Panel Servicing

**Service Details**

**Service Type**  
Asset Installation

**Time of Service**  
24/04/2021, 12:30 PM

▶ Installed Asset

**Submitted Evidence**

Start typing to search

**Photos**  
Records

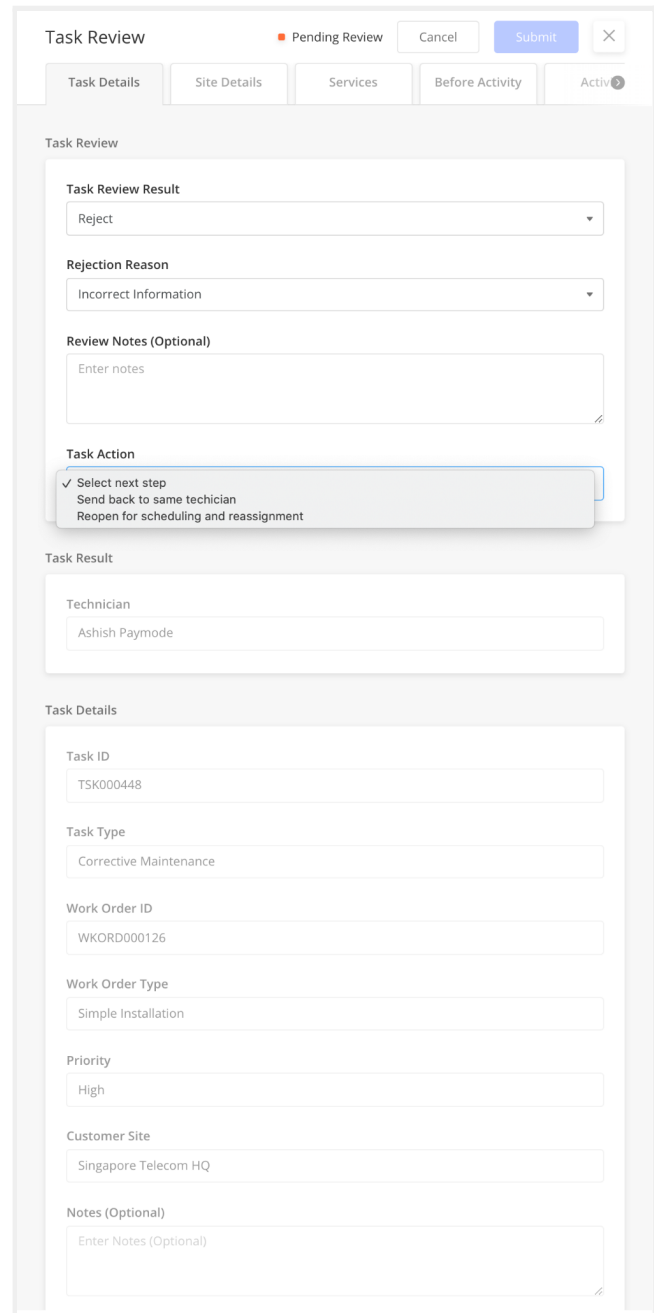
Captured On	Photo Taken	Captured By
24/12/2019, 11:09 AM		Adam
24/12/2019, 11:00 AM		Bane

## Approve & Reject Tasks

**Approve Task** - If a task is marked as "Approved" it will move to the Completed module with status = "Completed".

**Reject Task** - If the result is "Reject" there are two options for routing the task:

1. **Send back to the same technician:** Use this option to send the task back to the same technician with comments to fix immediately if they are still at the customer site. The task reappears in the assigned technician's task list and they are notified that the task has been sent back to them.
2. **Reopen for scheduling and reassignment:** Move the task to a Reopened status where dispatchers can assign to the same technician/crew or a new one at a later date. Use this option if the correction can't be made immediately and requires a second appointment.



The screenshot shows a 'Task Review' window with a 'Pending Review' status. It features a navigation bar with tabs for 'Task Details', 'Site Details', 'Services', 'Before Activity', and 'Activ'. The main content area is divided into several sections:

- Task Review Result:** A dropdown menu currently set to 'Reject'.
- Rejection Reason:** A dropdown menu currently set to 'Incorrect Information'.
- Review Notes (Optional):** A text input field with the placeholder 'Enter notes'.
- Task Action:** A list of three options:
  - Select next step
  - Send back to same technician
  - Reopen for scheduling and reassignment
- Task Result:** A section containing a 'Technician' dropdown menu with 'Ashish Paymode' selected.
- Task Details:** A section containing several input fields:
  - Task ID: TSK000448
  - Task Type: Corrective Maintenance
  - Work Order ID: WKORD000126
  - Work Order Type: Simple Installation
  - Priority: High
  - Customer Site: Singapore Telecom HQ
  - Notes (Optional): Enter Notes (Optional)

**Rejection Reasons and Notes** - When rejecting a task, reviewers can select from a predefined list of rejection reasons as well optionally provide additional notes.



## Site Change Requests

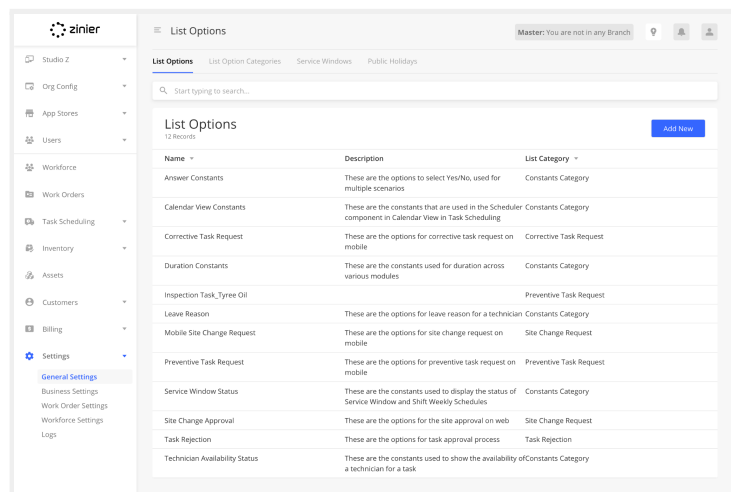
If a technician arrives on site and finds the address of the customer site to be inaccurate, they may submit a Site Change Request to alert web users who can approve to auto-update the address of the customer site or reject to dismiss the request.

## Corrective Maintenance Requests

If a technician has a task underway in the field but identifies additional corrective maintenance to be done, they can submit a Corrective Maintenance Request. If approved, an additional Corrective Maintenance task is added to the Work Order that can be assigned to the same or another technician.

## Manage Rejection Reasons

Selecting the list of Rejection Reasons is done for each Task Type from Settings / Work Order Settings. The lists themselves can be created and edited in Settings / List Options.

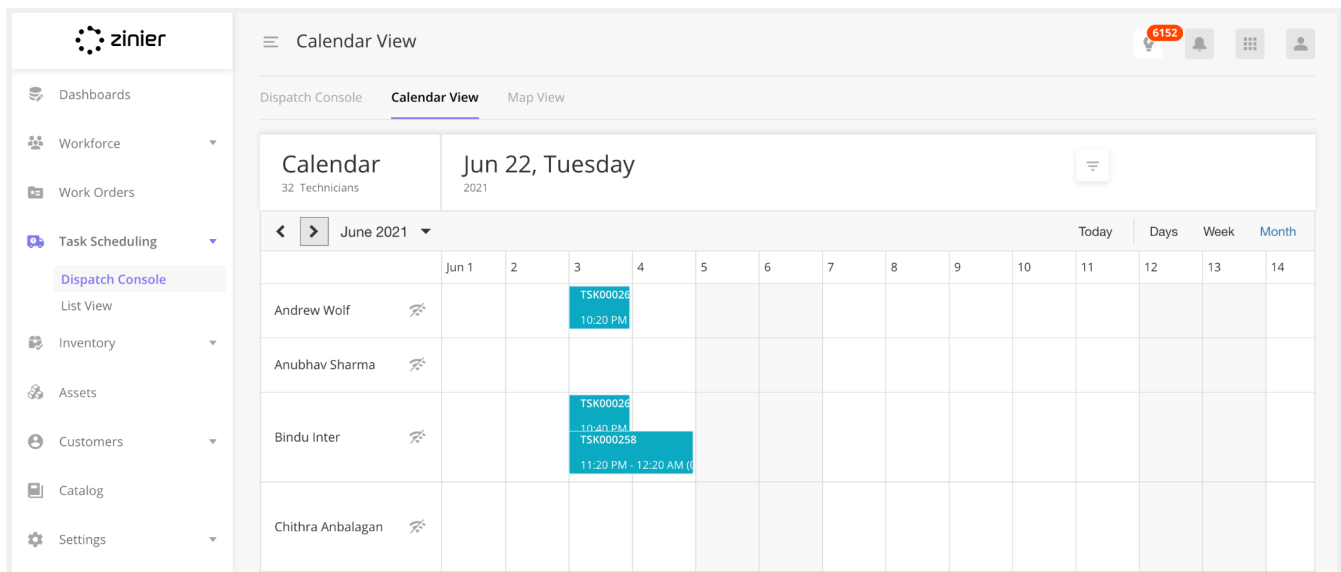


Name	Description	List Category
Answer Constants	These are the options to select 'Yes/No, used for multiple scenarios	Constants Category
Calendar View Constants	These are the constants that are used in the Scheduler component in Calendar View in Task Scheduling	Constants Category
Corrective Task Request	These are the options for corrective task request on mobile	Corrective Task Request
Duration Constants	These are the constants used for duration across various modules	Constants Category
Inspection Task_Tyree Oil		Preventive Task Request
Leave Reason	These are the options for leave reason for a technician	Constants Category
Mobile Site Change Request	These are the options for site change request on mobile	Site Change Request
Preventive Task Request	These are the options for preventive task request on mobile	Preventive Task Request
Service Window Status	These are the constants used to display the status of Service Window and Shift Weekly Schedules	Constants Category
Site Change Approval	These are the options for the site approval on web	Site Change Request
Task Rejection	These are the options for task approval process	Task Rejection
Technician Availability Status	These are the constants used to show the availability of a technician for a task	Constants Category

## Technician Calendar View

View the calendar/schedules of all technicians to better understand the availability on a daily, weekly, and monthly basis.

- Filter the List of Techs Filter technician list to see only selected technicians on the calendar.
- View Online/Offline Status of Techs If a technician has not been active on the mobile app for the last 60 minutes, an "offline" icon will appear next to the name of the technician.
- Quick View of Task Details View basic task details with a summary popup directly from the calendar. You can also view the full task details by clicking on a button from the pop-up.
- Dispatch Tasks from the Calendar View Quickly dispatch scheduled tasks directly from the popup that appears after clicking a task from the calendar view.



The screenshot shows the Zinier Technician Calendar View interface. The sidebar on the left contains navigation options: Dashboards, Workforce, Work Orders, Task Scheduling (with sub-options: Dispatch Console, List View), Inventory, Assets, Customers, Catalog, and Settings. The main content area is titled "Calendar View" and shows a calendar for June 2021. The current date is June 22, Tuesday. The calendar grid displays tasks assigned to technicians: Andrew Wolf, Anubhav Sharma, Bindu Inter, and Chithra Anbalagan. Tasks are represented by blue blocks with task IDs and time slots.

	Jun 1	2	3	4	5	6	7	8	9	10	11	12	13	14
Andrew Wolf			TSK00026 10:20 PM											
Anubhav Sharma														
Bindu Inter			TSK00026 10:20 PM TSK000258 11:20 PM - 12:20 AM (0											
Chithra Anbalagan														

## Schedule & Dispatch Automation

Automation comes into play when in a few different places in Scheduling & Dispatching: when manually assigning tasks, Dispatchers can choose to leverage the ISAC Tech Recommendation engine to view a list of recommended techs. Dispatchers can also utilize the Tech Recommendation engine to automate the process of scheduling and dispatching multiple tasks.

## Technician Recommendation

When manually assigning tasks, you can choose to leverage the ISAC Tech Recommendation engine to view a list of recommended techs. Technician Recommendations enable dispatchers to quickly assign individual tasks to the right technicians. The recommendation engine works by first filtering out technicians that are not available and do not match the skills, region, proximity, and service window associated with the task (the "Base Filters"). Next, the recommendation engine utilizes one of 3 pre-built Scheduling Optimization Methods that prioritize recommended technicians on the condition that's most important to the dispatcher such as utilization rate, travel time, or experience. The Scheduling Optimization Methods and base filter settings can be modified from the Settings / Scheduling Settings.

← Select Technician
Save

**Technicians**

### All Technicians

17 Records

Show Schedule

Name	Travel Time	Availability	Shift
<input type="radio"/> Akshay J	-	Unavailable	-
<input type="radio"/> Ambarish Ghosh	-	Available	9:00
<input type="radio"/> Andrew Wolf	24 mins	Unavailable	08:00
<input type="radio"/> Arjun Ramachandra	-	Unavailable	-
<input type="radio"/> Arun Chetty	16 mins	Booked	9:00
<input type="radio"/> Ashish Paymode	-	Unavailable	08:00
<input type="radio"/> Dinusha Prabanath	-	Unavailable	08:00
<input type="radio"/> Jaime Juan	1 day 17 hours	Booked	9:00

▼ How Technicians are Recommended

Many different parameters are used in the algorithm to recommend the best technicians to do this task. Here's an overview of the metrics you see above to give you a better understanding of how recommendations are made.

**Utilization Rate**  
A weekly metric used to keep task load evenly balanced in your workforce. Technicians with lower utilization rates are prioritized to keep the distribution even.

**Predicted Travel Time**  
Estimated travel time between tasks or from the technician's base location. This figure is an estimate and can change depending on schedule adjustments, but gives you an idea of who may be in the area at the scheduled time of this task.

**Experience Score**  
This score reflects a combination of experience at the customer site, experience performing similar tasks, first time fix rate, and skills.

## “Base” Recommendation Filters

### Availability

Technicians must be available during the scheduled time of the task. "Available" is defined by:

- Within the technician's normal shift or during planned overtime
- No other tasks assigned to the technician
- Not on planned leave
- Not a public holiday

Techs that are not available are not shown in recommendation lists.

### Required Skills

Techs must have the required skills and skill levels associated with the task type. Techs without the required skills are not shown in recommendation lists. Admins can turn off this filter in Settings. If no skills are present for the Task, this filter is ignored and all technicians are eligible.

### Region

If a tech is associated with a Contractor, then the regions associated with the Contractor must include the region associated with the Customer Site where the task is being performed, otherwise, the technician is filtered out of the recommendations.

### Proximity

The tech must be within a predefined proximity.

- Technicians outside of the default proximity are filtered out.
- No tasks are assigned to a technician for the date of the task at hand: Proximity is determined by comparing the home base location of the tech to the location of the Customer Site.
- Tasks have already been assigned for the date of the task: Proximity is calculated from the previous task's location to the one which is being scheduled.
- The task is set to commence within the next 90 minutes: Proximity will take into account the last known location of the tech.

Default Proximity is set in Settings -> Work Order Settings -> Scheduler Settings

## Scheduling Optimization Methods

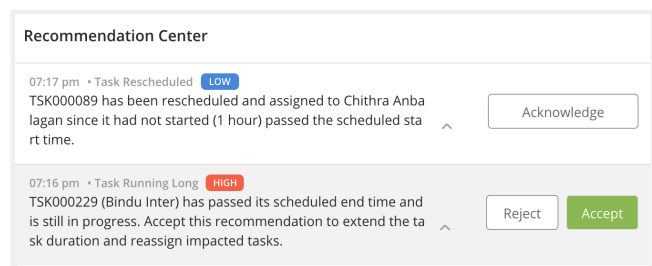
When leveraging the Tech Recommendation engine and Auto Scheduler users can choose between the 3 pre-built Scheduling Optimization Methods that further constrain the list of recommended technicians. These optimization algorithms are listed in more detail in the Scheduling Settings section below. Please note that This configuration only works for the following scheduling method: **Assign Pre-Scheduled Tasks to Technicians** which considers tasks that have a scheduled start date & time.

### Scheduling Optimization

#### Recommendations (New 2.10)

These are recommendations that run on timer events in the background based on the logic added in. Recommendations can be of 2 kinds:

- Passive (has an Acknowledge button for the user)
- Active (user can Accept/Reject the recommendation)



#### Recommendation:

##### Long-Running Tasks (New 2.10)

The recommendation is sent for each task that isn't submitted 30 minutes after its scheduled end time (default). Accept recommendation to extend the estimated task duration by one hour (default) and reschedule/reassign impacted tasks on that technician's calendar.

#### Recommendation: Missed

##### Scheduled Start Time (New 2.10)

Tasks that have passed their SST by one hour (default) without starting are automatically rescheduled and reassigned within their SLA. A passive recommendation is sent to dispatchers to let them know about this change.

## Auto-Schedule Tasks

Define parameters to define the Tasks you want to pick up for auto-scheduling including region, task types, and the time range and statuses that need to be considered for the same. The maximum time range that we're able to consider now is 2 weeks out. View and select tasks from a list filtered based on these parameters for the auto-scheduler to pick up.

On running the auto-scheduler, all these tasks are scheduled and assigned to technicians with the required skillset and within the proximity (based on what is defined in Scheduling Settings). The platform schedulers ensure that tasks are scheduled to be completed before the SLA deadline and are grouped together so that they can be assigned to technicians in the vicinity. Capacity-based schedulers are being used by us at the moment.

Note that the Auto Scheduler currently only schedules tasks that have a one-time slot ("single day" tasks) with the Task Assignment Type = Single Technician. Multi-day and Crew tasks cannot be auto-scheduled at this time.

---

## Filtering and Selecting Tasks (Updated 2.10)

Before running the Auto Scheduler, users first have the option to select which tasks to Auto-Schedule based on the following set of filters:

### Filters & Scheduling Method

#### Scheduling Method, I want to:

**Schedule and Assign Tasks** - Considers tasks that do not have a scheduled start date & time (considers Deadline of the work order).

#### Assign Pre-Scheduled Tasks to Technicians

Considers tasks that have scheduled start date & time.

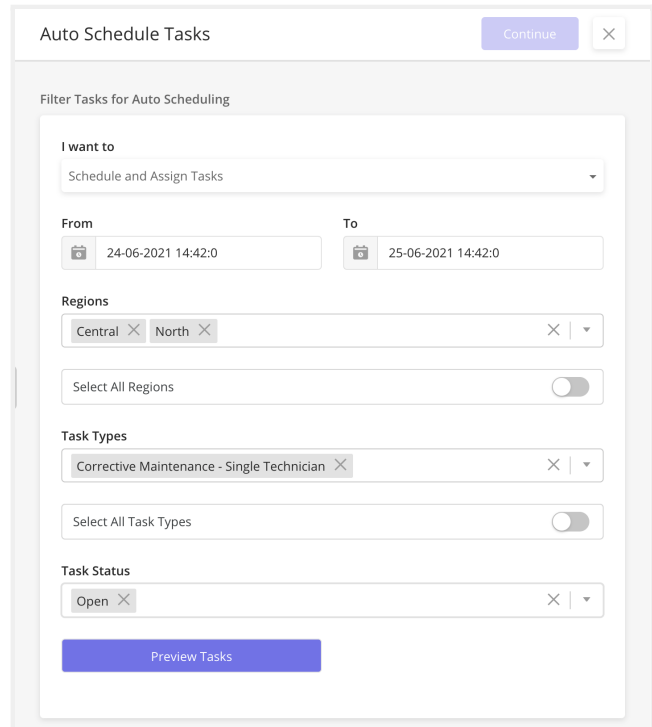
**Filter Tasks by Time Range** - Filter by tasks that are open/scheduled/dispatched within a specified time range (choose dates in a 10-day time range).

**Filter Tasks by Region** - Filter tasks by one or more regions. Regions are associated with the customer site the task is assigned to. To see tasks for all regions, the users can also select All Regions.

**Filter Tasks by Task Type** - Filter by one or more task types. To see tasks for all task types, select All Task Types.

**Filter Tasks by Status** - Users can filter for tasks that are Open, Scheduled or Dispatched.

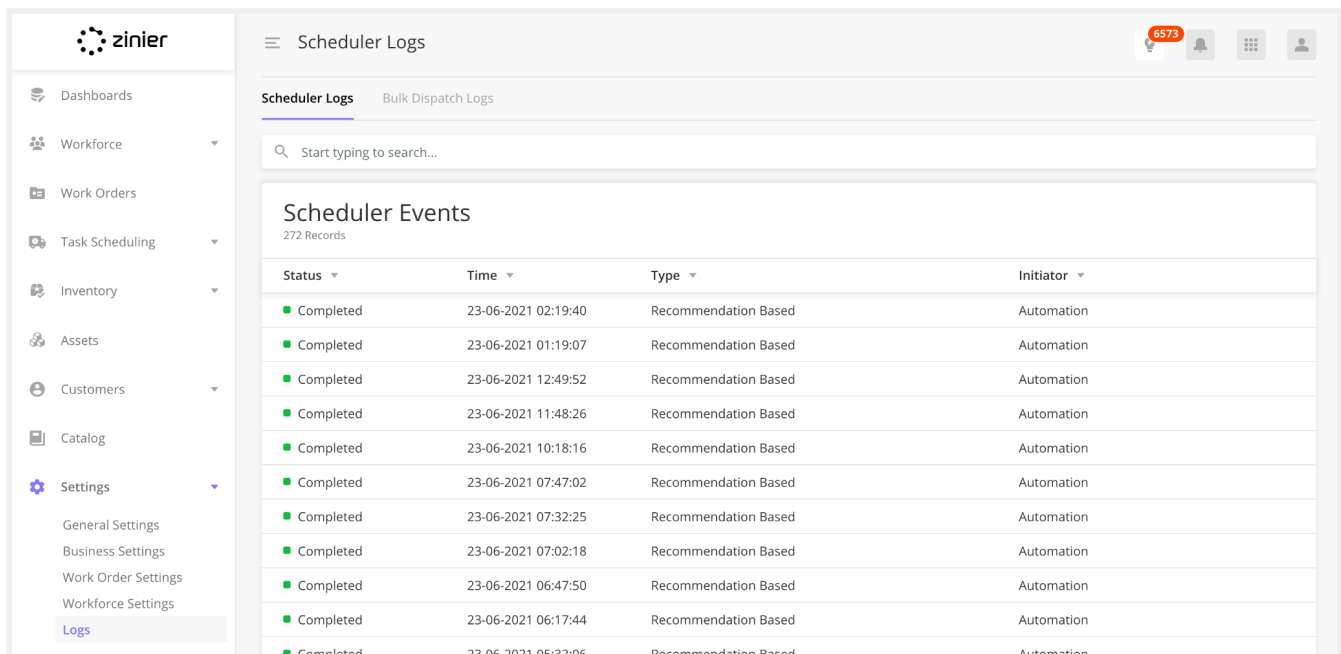
Once the selection is made, users will see a list of the filtered tasks as outlined above. Users then have the option of selecting which tasks from that list to auto-schedule.



## View Auto Scheduling Logs (Updated 2.10)

Users can view a log of all tasks that have been Auto Scheduled from the Settings / Logs / Scheduling Logs module. This is useful when you want to identify and correct any scheduling issues.

The timestamp of when the auto-scheduler was initiated and the name of the initiator can also be seen here. There are statuses introduced for the scheduler runs - Queued, In Progress, Completed and Failed. This allows the user to know what's happening with each of their scheduler runs.



Status	Time	Type	Initiator
Completed	23-06-2021 02:19:40	Recommendation Based	Automation
Completed	23-06-2021 01:19:07	Recommendation Based	Automation
Completed	23-06-2021 12:49:52	Recommendation Based	Automation
Completed	23-06-2021 11:48:26	Recommendation Based	Automation
Completed	23-06-2021 10:18:16	Recommendation Based	Automation
Completed	23-06-2021 07:47:02	Recommendation Based	Automation
Completed	23-06-2021 07:32:25	Recommendation Based	Automation
Completed	23-06-2021 07:02:18	Recommendation Based	Automation
Completed	23-06-2021 06:47:50	Recommendation Based	Automation
Completed	23-06-2021 06:17:44	Recommendation Based	Automation
Completed	23-06-2021 05:27:06	Recommendation Based	Automation

## Scheduling Settings (Updated 2.10)

The following settings allow you to configure different aspects of scheduling automation in the Task Scheduling module. These settings are used by the Tech Recommendation engine and Auto Scheduler.

- **Use Skills (Yes / No)** - When turned on, Techs must have the required skills and skill levels associated with the task type. Techs without the required skills are not shown in recommendation lists.
- **Define the Minimum Proximity** - Define a minimum distance between a technician's



current location or base location and the task location (the location of the Customer Site associated with the task). Technicians outside of this range will be filtered out when running the Tech Recommendation.

- Select a Primary Optimization Method** - When leveraging the Tech Recommendation engine and Auto Scheduler, users can choose between the 3 pre-built Scheduling Optimization Methods that further constrain the list of recommended technicians.

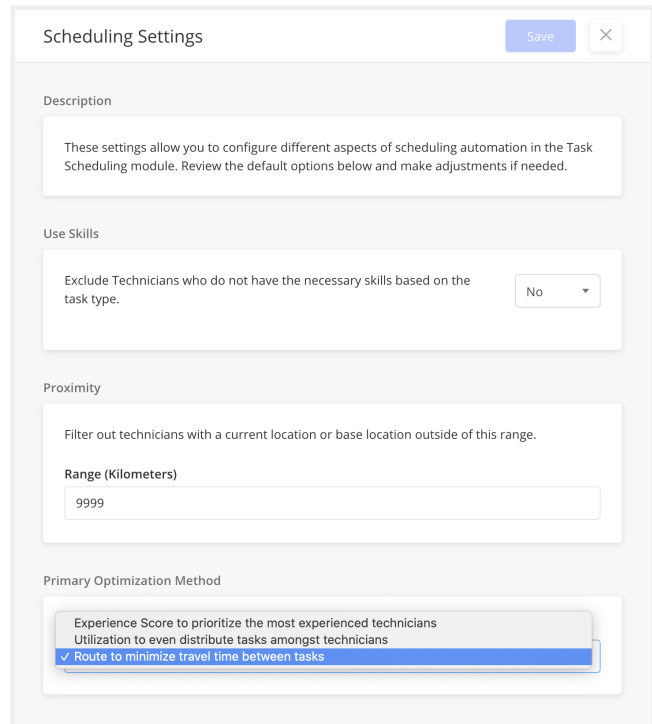
## Optimization Methods

This configuration only works for the following scheduling method: Assign Pre-Scheduled Tasks to Technicians which considers tasks that have a scheduled start date & time.

**Utilization Rate** - A weekly metric used to keep task load evenly balanced in your workforce. Technicians with lower utilization rates are prioritized to keep the distribution even.

**Predicted Travel Time** - Estimated travel time between tasks or from the technician’s base location. This figure is an estimate and can change depending on schedule adjustments, but gives you an idea of who may be in the area at the scheduled time of this task.

**Experience Score** - This score reflects a combination of experience at the customer site, experience performing similar tasks, first-time fix rate, and skills.



# Mobile Field Service

There are three Task Types offered as a part of the Standard Mobile Workflows. They all use the same underlying mobile workflow as of now and differ only in the default Services added to each Task Type based on a company's needs.

All standard mobile workflow tasks can be assigned to one technician for a single customer site on a specific date and time. Once tasks are submitted, they are sent to web users for review with photo evidence. They can be approved or rejected with the option to give feedback to the technician.

**Simple Installations** - Expand operations with this standard workflow for installations.

**Corrective Maintenance** - Restore service efficiently and effectively with this standard workflow for corrective maintenance.

**Preventive Maintenance** - Perform proactive, routine preventive maintenance to prevent breaks and loss of service before they happen.

## Additional Functionality

All standard mobile workflows contain these additional functions:

- Site Change Request
- Request a Corrective Maintenance Task
- Incident Reporting
- Discontinue a Task
- Report a Task Delay

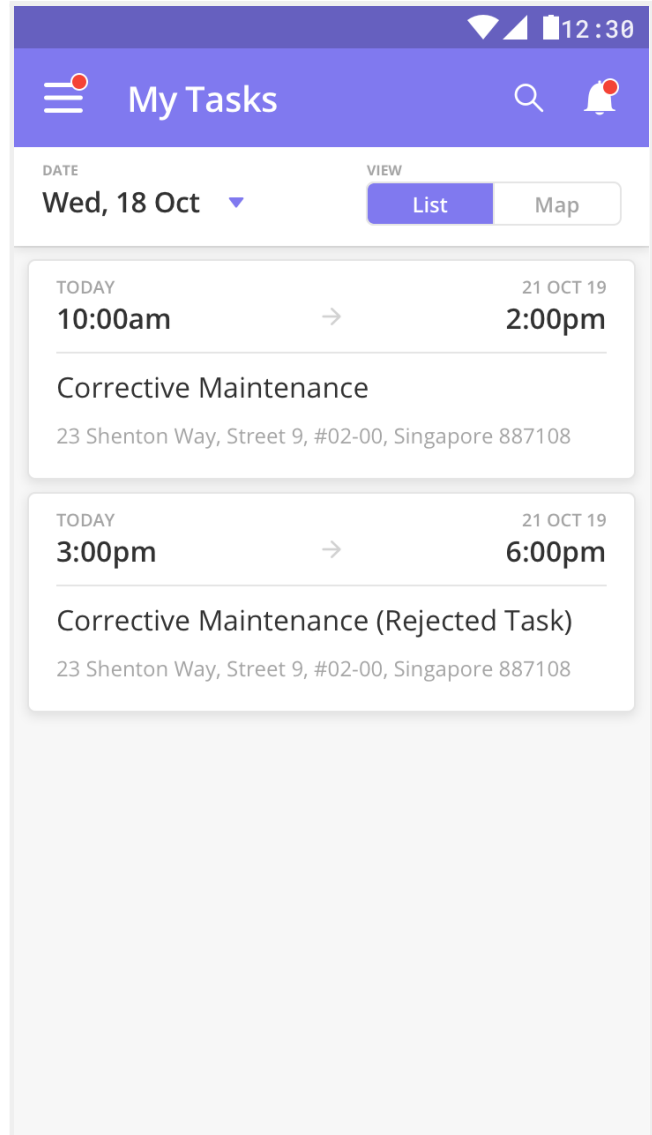
---

## Mobile Workflow Steps

The section below describes the different steps and screens of the standard Mobile Workflow.

### Step 1 - View Task Details

The technician views the task list on their mobile device and opens the Task Details.



## Step 2 - Start / End Travel


The Technician taps the Start Travel button when he/she commences travel to the Customer Site. Doing so does the following:

- Provides visibility to Dispatchers as the Task status changes to "In Transit"
- Captures timestamp and location when travel starts
- Captures tech's Estimated Time of Arrival at Customer Site based on the mode of transport used.

Upon reaching the Customer Site, the Technician taps the Check-In button which captures the actual time of arrival at the Customer Site.

↑

### Customer Location



Navigate with Map

Address

23 Shenton Way, Street 9, #02-00, Singapore 887108

Customer

ACME Corporation

Site Contact Number

+14158423774


Mode of Transport

Driving
▼

### Step 3 - Check-In

From the Task Details, technicians can perform a geo-check-in.

#### Customer Location



23 Shenton Way, Street 9

Address  
23 Shenton Way, Street 9, #02-00, Singapore 887108

Customer  
ACME Corporation

Site Contact Number  
+14158423774

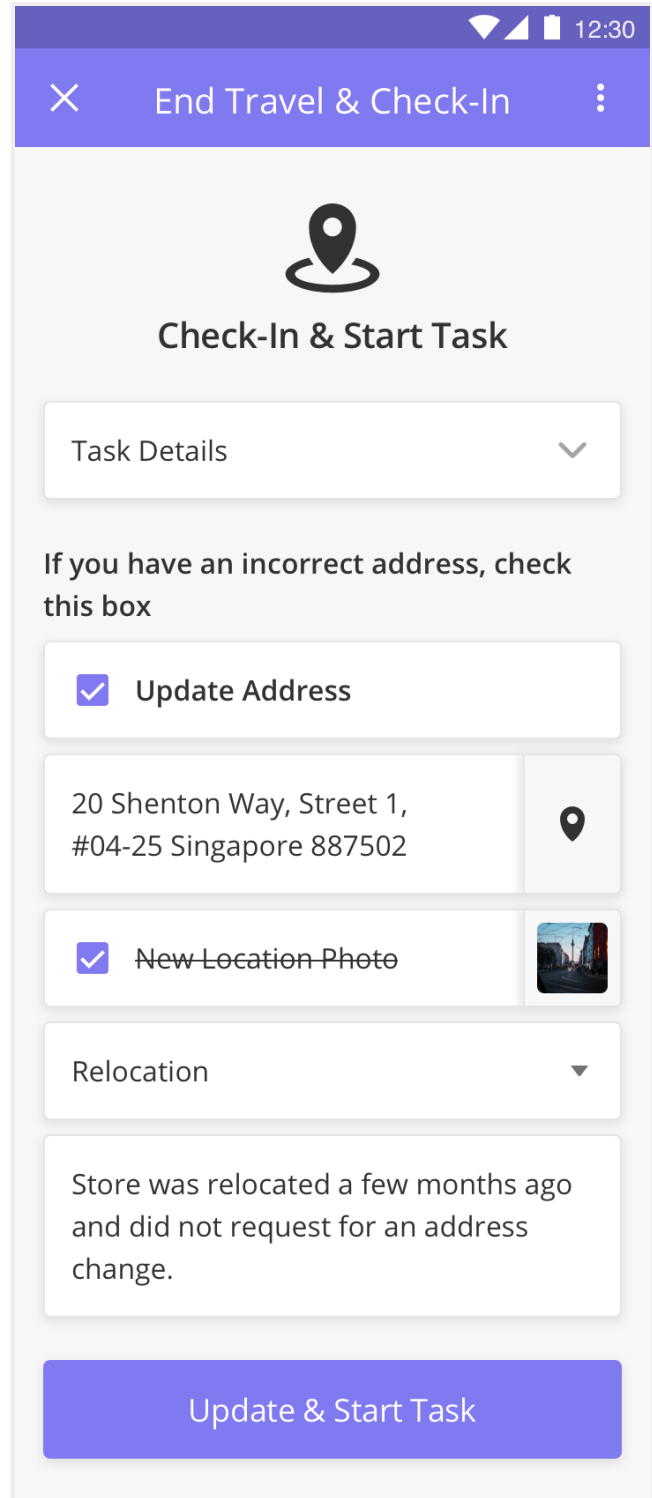
If you have an incorrect address, check this box

Update Address

Check-In

### Step 3a - Submit Site Change Request

Tech also has the option to update the site address/location if it does not match the actual address or location. The updated details are then sent to the web user to update the customer site record with the correct address/location. Web users will need to approve the request in order to automatically update the Customer Site record in Zinier.



12:30

End Travel & Check-In

Check-In & Start Task

Task Details

If you have an incorrect address, check this box

Update Address

20 Shenton Way, Street 1,  
#04-25 Singapore 887502

New Location Photo

Relocation

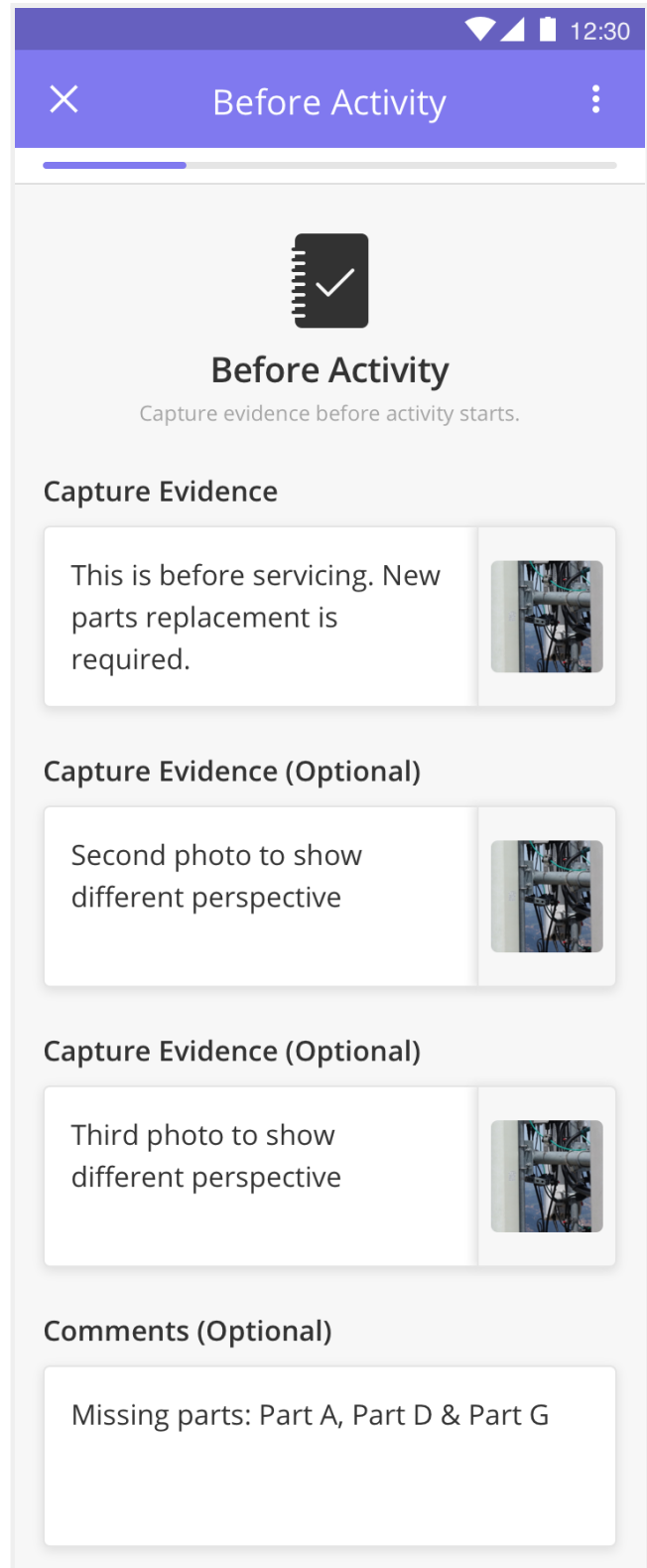
Store was relocated a few months ago and did not request for an address change.

Update & Start Task

#### Step 4: Capture Evidence Before Starting


##### Work

After Check-In, technicians need to capture at least one “before” photo before starting work. He can add up to three and comments are optional.




**Before Activity**  
Capture evidence before activity starts.


**Capture Evidence**

This is before servicing. New parts replacement is required. 

**Capture Evidence (Optional)**

Second photo to show different perspective 

**Capture Evidence (Optional)**

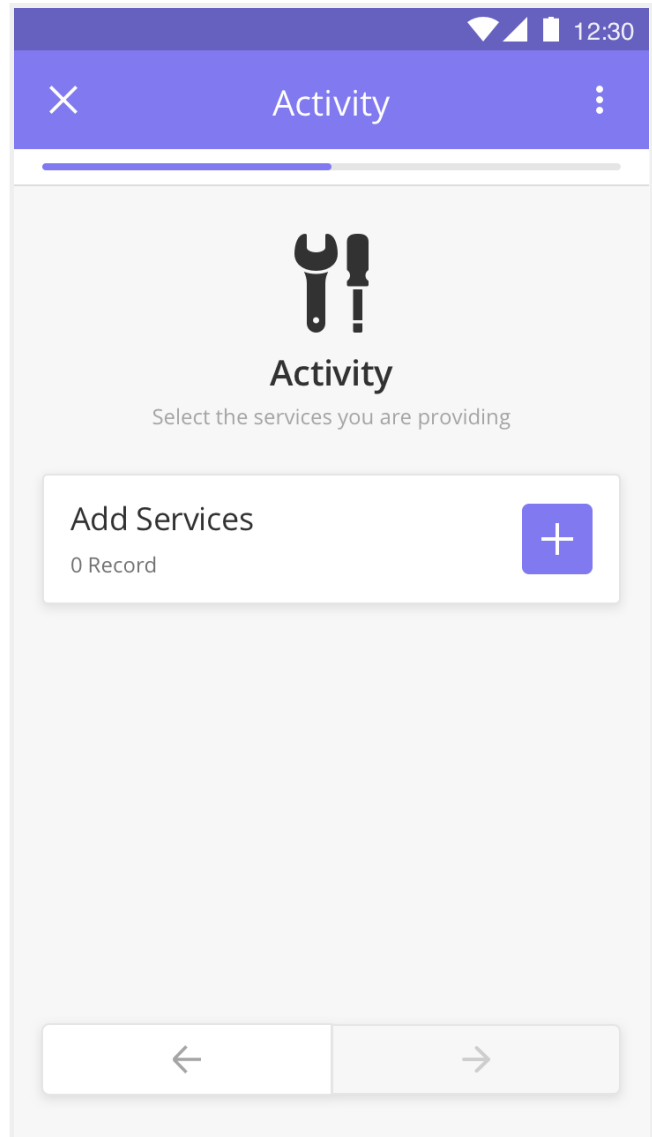
Third photo to show different perspective 

**Comments (Optional)**

Missing parts: Part A, Part D & Part G

**Step 5: Begin Work by Adding Services**

After initial evidence is collected, technicians need to select a Service to begin work. Think of Services as steps or mini-tasks. The list of services a technician sees here is dependent on what services were added to the task by the web user upon task creation.



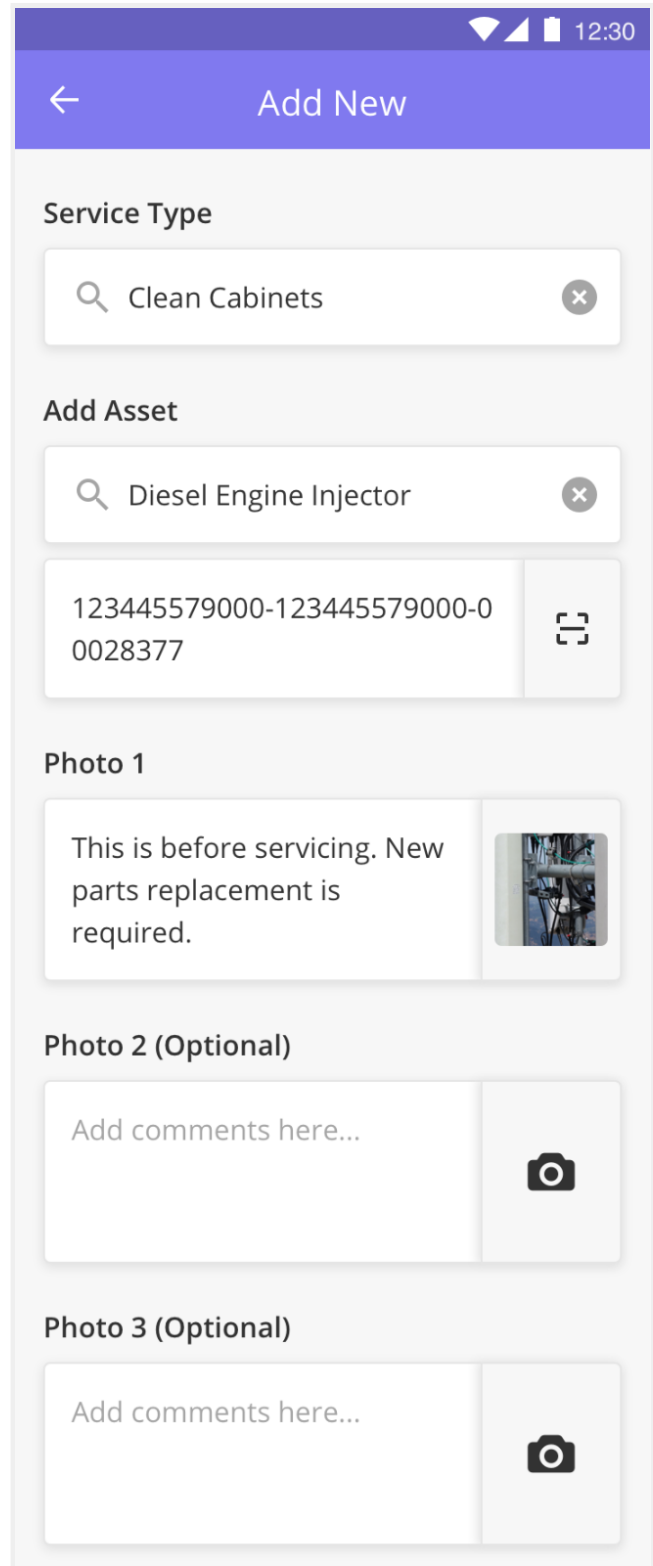


**Step 6: Complete Each Service Task**

Once a Service is selected, technicians can (optionally) associate that service with an Asset. Technicians can take photos and optional comments to describe the action taken. After servicing is finished, additional services can be added to the same task. Repeat the same process for any additional services needed.

**Step 7: Repeat for Additional Services as Needed**

After completing the first service, Technicians can repeat the same process for any additional services needed.



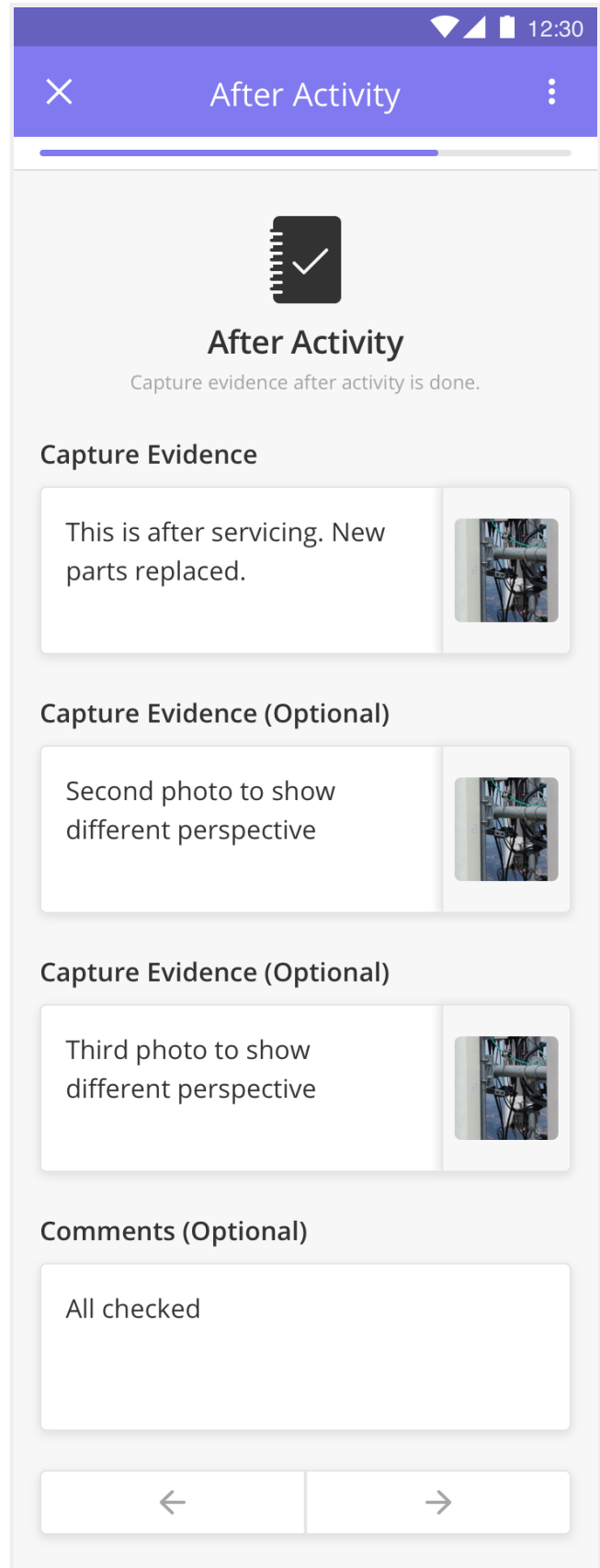
The screenshot shows a mobile application interface for adding a new service task. At the top, there is a purple header with a back arrow and the text "Add New". The status bar at the very top shows signal strength, Wi-Fi, battery, and the time 12:30.

The form is divided into several sections:

- Service Type:** A search bar containing the text "Clean Cabinets" with a magnifying glass icon on the left and a close "x" icon on the right.
- Add Asset:** A search bar containing the text "Diesel Engine Injector" with a magnifying glass icon on the left and a close "x" icon on the right. Below this is a field for an asset ID containing "123445579000-123445579000-00028377" and a QR code icon on the right.
- Photo 1:** A text input field containing "This is before servicing. New parts replacement is required." and a photo thumbnail on the right showing a mechanical part.
- Photo 2 (Optional):** A text input field containing "Add comments here..." and a camera icon on the right.
- Photo 3 (Optional):** A text input field containing "Add comments here..." and a camera icon on the right.

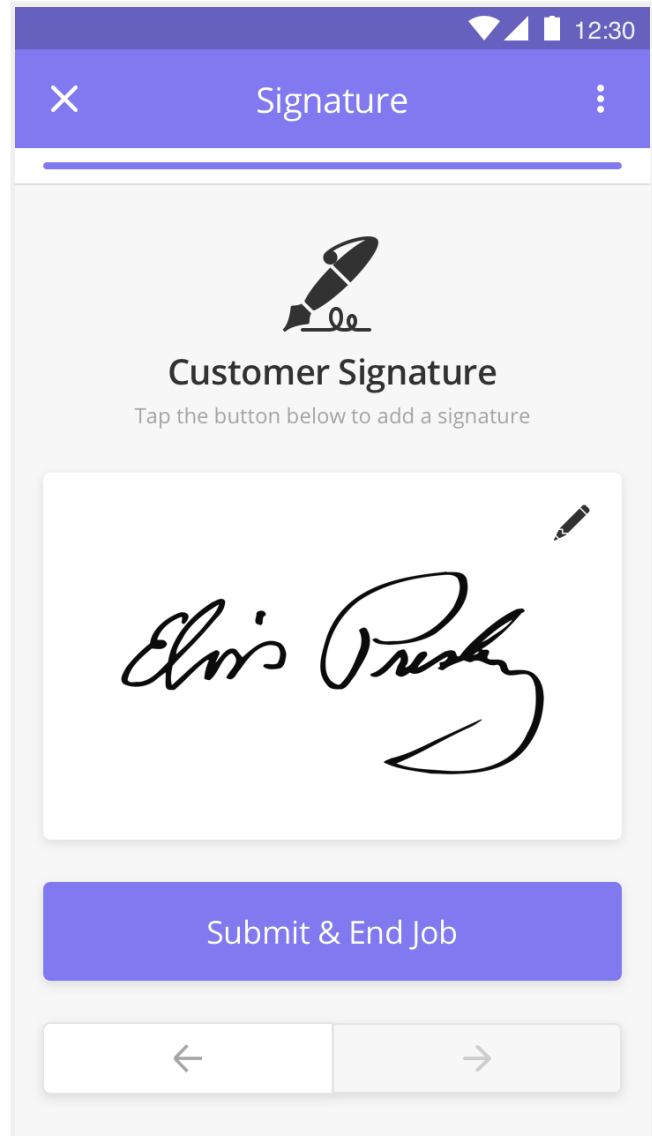
### Step 8: Capture Evidence After Completing Work

Once the task is done by the technician, he needs to capture final evidence. One photo is required and additional photos and notes are optional.



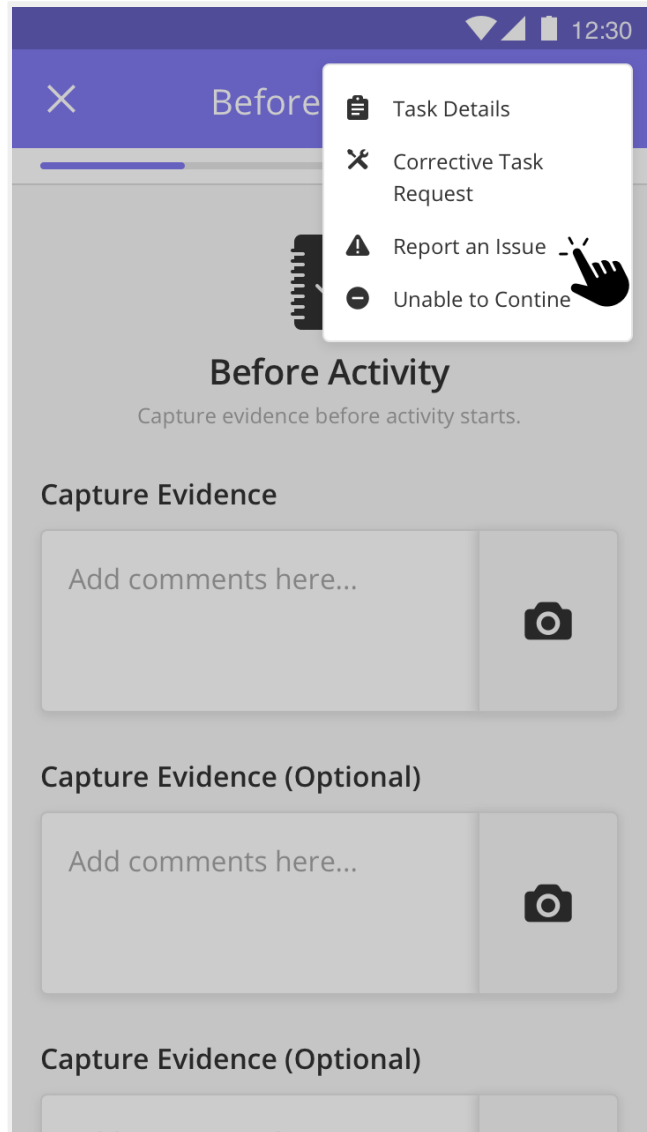
### Step 9: Collect Customer Signature and Submit

The last step in the process is collecting the customer's signature. After the customer signs off, the technician can submit the task for review by a web user.

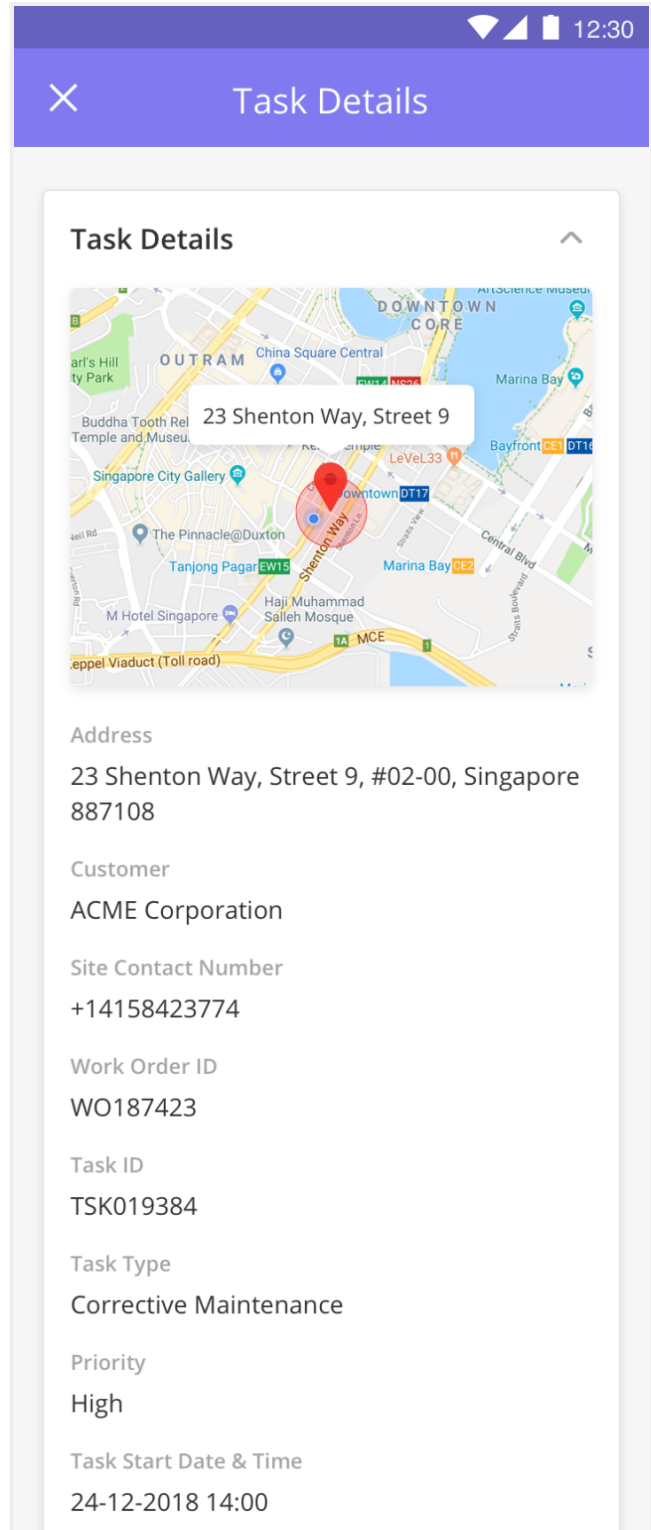


## Workflow Actions (Mobile)

Workflow actions can be accessed from any screen by tapping the 3 dots in the upper right-hand corner of the app.

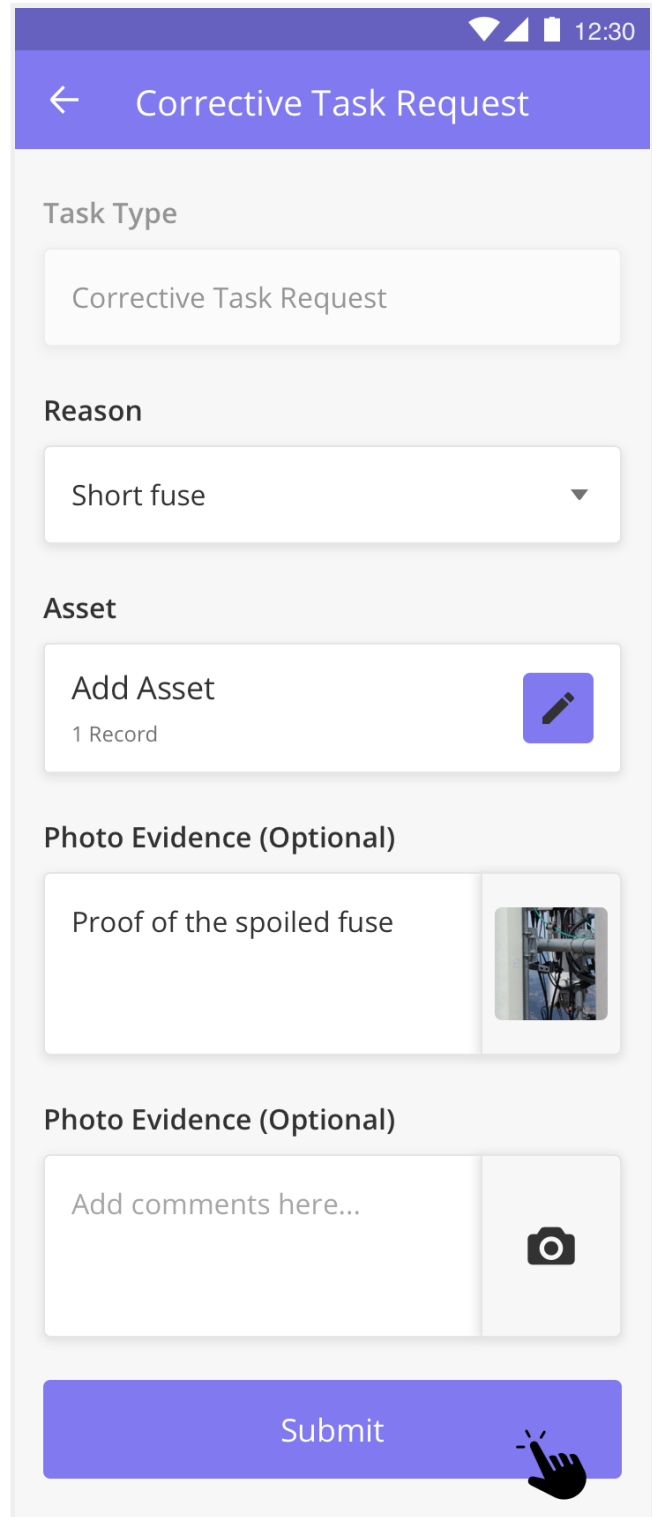


**View Task Details** - At any point in the mobile workflow, technicians can pull up the Task Details using the workflow actions in the top right. This may be needed to pull up contact information or review task details such as start and end time or notes provided by web users.



**Corrective Task Request** - At any point in the mobile workflow, technicians can access the workflow actions to trigger a Corrective Maintenance Task Request. Once submitted, these requests need to be reviewed on the Web. If approved, a new Task is created which can be scheduled and dispatched as per normal.

**Use Case** - A Technician is performing a Preventive Maintenance task and finds that one Asset is not functioning properly at the site. He or she can trigger a request for Corrective Maintenance which gets sent back to the web user for review and carry on with the Preventive Maintenance task.



12:30

← Corrective Task Request

**Task Type**

Corrective Task Request

**Reason**

Short fuse

**Asset**

Add Asset  
1 Record

**Photo Evidence (Optional)**

Proof of the spoiled fuse

**Photo Evidence (Optional)**

Add comments here...

Submit

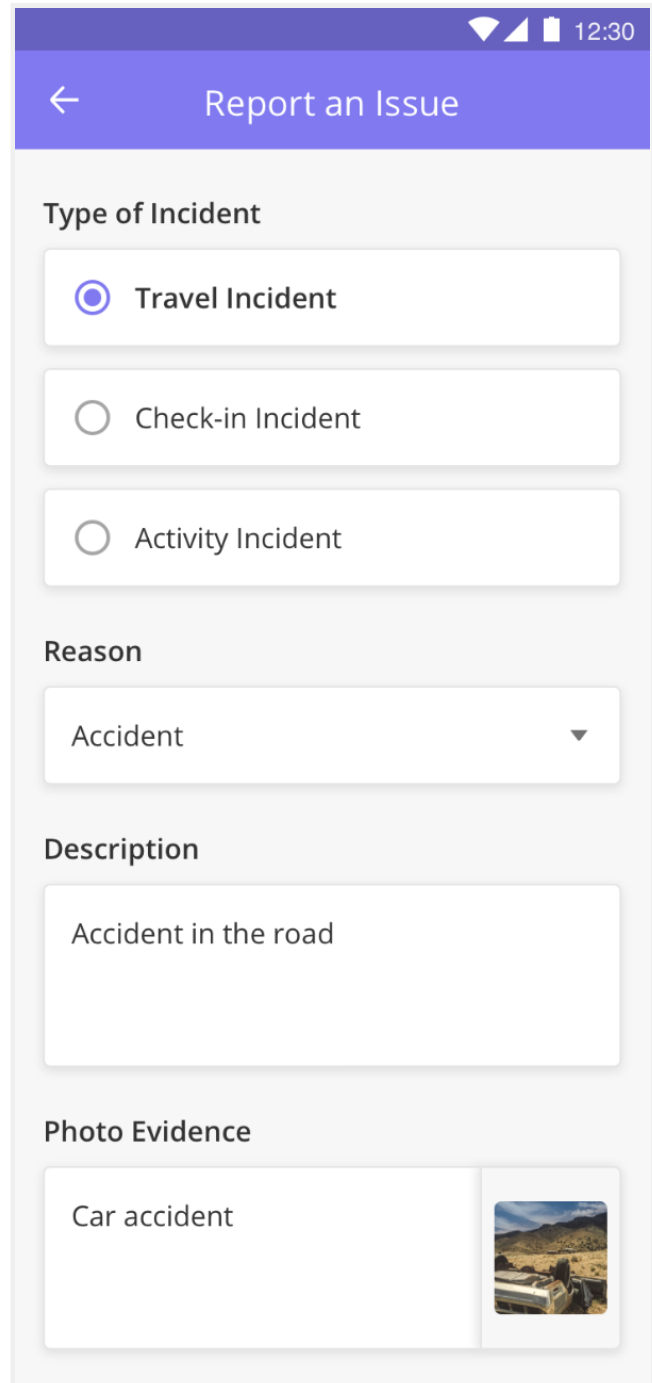
**Incident Reporting** - While performing a Task, Technicians access workflow actions to report non-blocking incidents (incidents that do not result in task cancellation or delay).

Examples/reasons include:

- Travel Incident
- Checkin Incident
- Activity Incident

**Task Delay** - While performing a Task, Technicians access workflow actions to report incidents that lead to a task delay. Doing so keeps web dispatchers informed in case there may be a need to adjust schedules. When reporting a task delay, a Technician can report the expected duration of delay (in minutes and) and select from a predefined list of reasons (configurable from List Options in FSE) which include:

- Traffic
- Accident/Injury
- Task taking longer than expected
- Building/Site Access Issues



The screenshot shows a mobile application interface for reporting an issue. At the top, there is a purple header with a white back arrow on the left and the text 'Report an Issue' on the right. The status bar at the very top shows signal strength, Wi-Fi, and the time 12:30. Below the header, the form is organized into sections:


- Type of Incident:** Three radio button options are listed: 'Travel Incident' (which is selected), 'Check-in Incident', and 'Activity Incident'.
- Reason:** A dropdown menu is shown with 'Accident' selected and a downward arrow on the right.
- Description:** A text input field contains the text 'Accident in the road'.
- Photo Evidence:** A text input field contains 'Car accident', and to its right is a small square image showing a car accident scene with a vehicle on a road.

**Discontinue Task** - While performing a Task, Technicians access workflow actions to report incidents that can not be resolved on the spot and block the technician from completing a task. When discontinuing a task, a technician can select from a predefined list of task cancellation reasons configurable from List Options in FSE which include:


- Do not have tools
- The problem is not what was expected (lack of skills)
- A corrective task needs to be created which is a blocker for the current Task to be done at hand
- Accident/Injury
- Lack of required documents/permits/licenses

After a task is discontinued, web dispatchers can review and reschedule / re-assign accordingly.


**Photo Evidence**

Car accident


**Photo Evidence (Optional)**

Car accident


**How would you like to proceed?**

Continue with Task
 

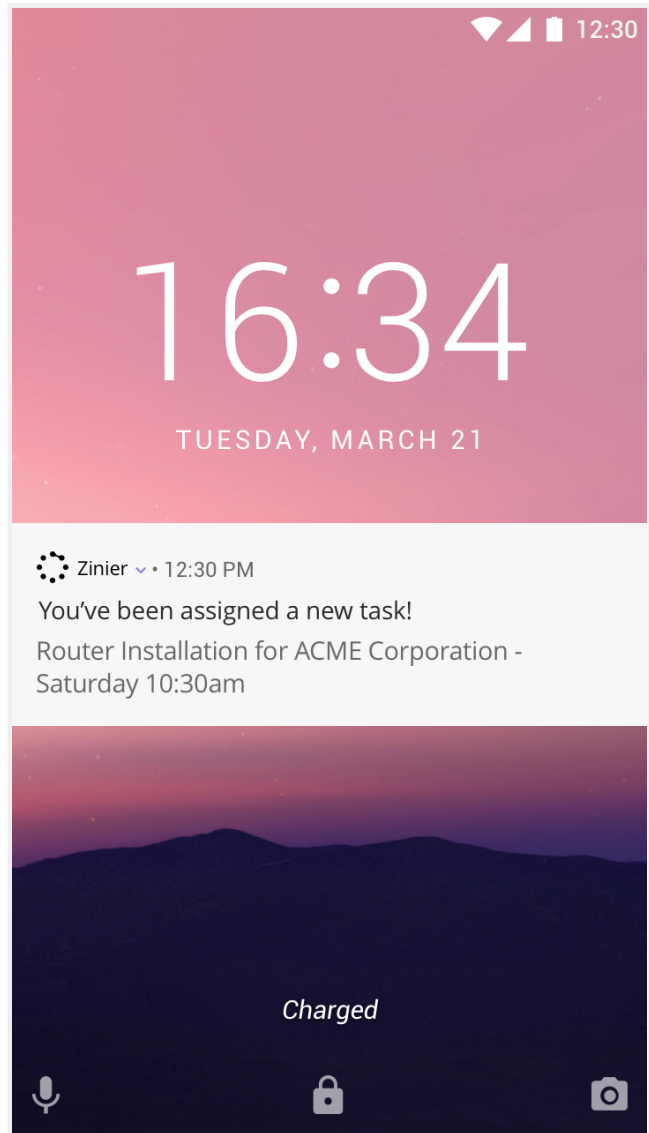
Report Task Delay

Submit



**Standard Mobile Notifications** - Standard push notifications to notify technicians of important events such as:

- Task Assigned
- Task Cancelled
- Task Rejected and Sent Back
- Leave Added
- Overtime Added
- And more...




---

## View Task Results (Web)

Once a task is submitted, the data collected (the Task Results) can be viewed and approved/rejected from the Task Scheduling / Task Approval module.

As a web user I can now see the following information:

- **View Task Details** - Original information about the task including schedule, priority, assignee, and more.

- **View Site Details** - Information about the Customer Site where the task takes place.
- **View Services** - Details of services performed by the technician during the task (photos and comments).
- **View Before Activity** - Information collected by the technician before beginning the task (photos and comments).
- **View After Activity** - Information collected by the technician after the task was complete (photos, comments, and customer signature).
- And more....

## Task Review (Web)

The web user can view the task results and approve or reject the task.

**Approve the Task** - Upon viewing the task results, the approver has the option to "Approve" the task if all the information is correct. Doing so will change the status of the task to "Completed" and move the task to the "Closed" module in Task Scheduling. If all tasks in the Work Order are completed, the Work Order will also be marked as "Completed" and move to the Completed module in Work Orders.

**Reject the Task** - Upon viewing the task results, the approver can also "Reject" the task if it is missing any information.

More information can be found in the Task Review section of this document.

Task Review
■ Pending Review
Cancel
Submit
✕

Task Details
Site Details
Services
Before Activity
Activ

**Task Review Result**

Choose option  
 Approve  
 Reject

**Task Result**

Technician

**Task Details**

Task ID

Task Type

Work Order ID

Work Order Type

Priority

Customer Site

Notes (Optional)

▼ Original Schedule

Schedule Start Date & Time

Schedule End Date & Time

Estimated Task Duration (Minutes)

▼ Actual Schedule

Actual Start Date & Time

## Review Corrective Maintenance Task Requests (Web)

As mentioned above, technicians can access the workflow actions to trigger a Corrective Maintenance Task Request at any time while performing a task.

**View the Task Request** - Once submitted, web reviewers can see information about the request as well as the original details of the site and task. The reviewer will then have the option to approve or reject the request. These requests can be viewed from the Pending Review tab in Task Scheduling.

**Approve the Request** - If the web reviewer approves the request, a Corrective Maintenance task is automatically created under the same Work Order and is immediately available for scheduling in the assignment in the Open section of Task Scheduling. The web request task is then marked as "Completed" and moved to the Closed Tasks tab of task Scheduling.

**Reject the Request** - If the web reviewer rejects the request, they have the option to select a Rejection reason and add comments. The web request task is then marked as "Completed" and moved to the Closed Tasks tab of task Scheduling.

Site Change Request
■ Site Change Request
Submit ✕

Site Change Review

Original Site Details

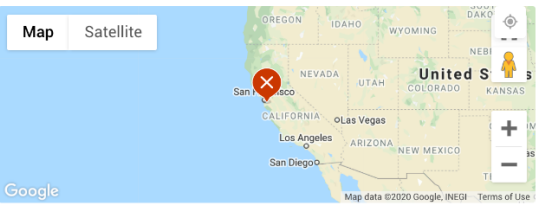
Original Task Details

**Task Review Result**

Choose option  
 Approve  
 Reject

**Address Update**

Map
Satellite



**Current Location**

Palo Alto, CA, USA

**Current Latitude & Longitude**

37.4418834,-122.1430195

**Updated Location**

13850 Travilah Road, Rockville, Maryland, United States, 20850

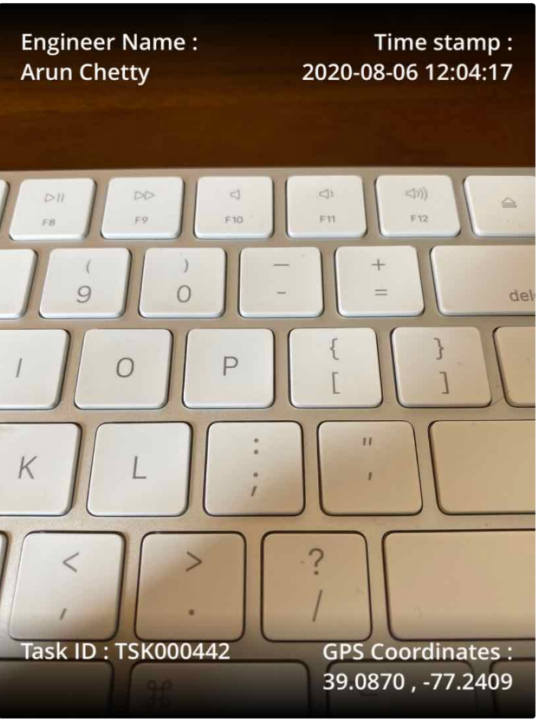
**Updated Latitude & Longitude**

39.08347955033072,-77.23249129951

**Photo Evidence**

**Engineer Name :**  
Arun Chetty

**Time stamp :**  
2020-08-06 12:04:17




**Task ID : TSK000442**

**GPS Coordinates :**  
39.0870 , -77.2409

Reason

## Closeout Package (Web)

Once a Work Order has been completed, a web user can generate a closeout package for auditing and accounting purposes.

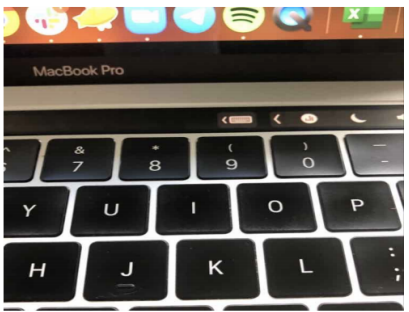

Zinier Inc.

---

**Task Details - TSK000066**

Task Type	Corrective Maintenance
Technician(s)	Ronak Agrawal
Start Date & Time	2020-06-02 05:01:32.0
End Date & Time	2020-06-02 06:01:32

**Before Activity**



**Photo Evidence 1**

Comment

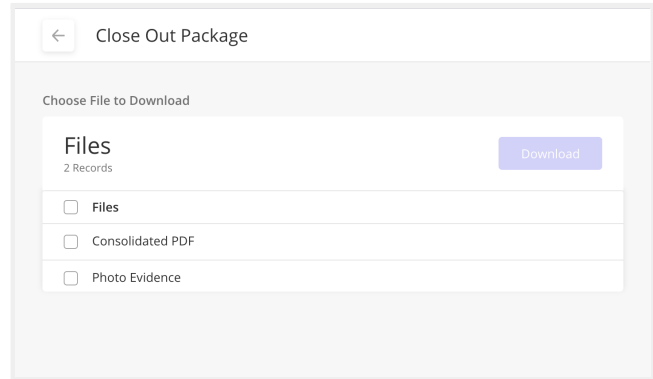
Comments

**Generate Closeout Package** - Closeout packages can be downloaded from the Work Orders module for any work order that is in Completed status. Users can download either the Consolidated PDF, a separate file with the photo images captured by the technician, or both.

**Download Closeout Package PDF** - Users can download a PDF file with work order details and a list of Tasks. Click any of the links in the PDF to view task details with compressed images and notes provided by the technician.

Logo and colors are fixed in this version but can be substituted via configuration with the org's or end customer's colors/logo (this would require a custom closeout package).

**Download Photo Evidence** - Users can also download images in a separate .zip file to view high-fidelity images captured by technicians in the field.



# Backoffice Operations

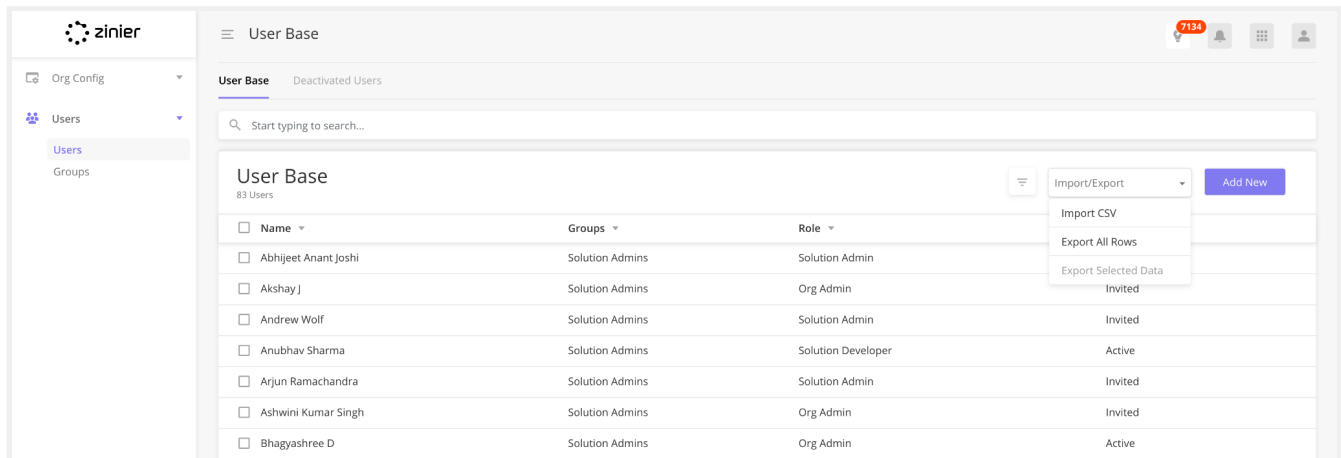
## Workforce Management (Users, Groups & Workforce)

Your workforce is managed in two different modules in FSE. User access is first managed in the Users module which allows admins to invite users to have access to Zinier and assign users to groups. Once a user has access to Zinier, he/she can be added as a Technician and managed from the Workforce module.

---

## Users

Manage (invite, edit and deactivate) the users in the organization. User records are first added to the system with the status "Pending Invite" so you can verify the information of the user is correct. Users can then be "Invited" to the org which sends an email invitation to the user with sign-up instructions. Once invited, users can then be added to the workforce.



The screenshot displays the 'User Base' management interface. It features a sidebar on the left with navigation options: 'Org Config', 'Users', and 'Groups'. The main content area is titled 'User Base' and shows a table of users. The table has columns for 'Name', 'Groups', and 'Role'. A search bar is located at the top of the table area. To the right of the table, there are buttons for 'Import/Export', 'Add New', 'Import CSV', 'Export All Rows', and 'Export Selected Data'. The table contains the following data:

Name	Groups	Role	Status
Abhijeet Anant Joshi	Solution Admins	Solution Admin	Invited
Akshay J	Solution Admins	Org Admin	Invited
Andrew Wolf	Solution Admins	Solution Admin	Invited
Anubhav Sharma	Solution Admins	Solution Developer	Active
Arjun Ramachandra	Solution Admins	Solution Admin	Invited
Ashwini Kumar Singh	Solution Admins	Org Admin	Invited
Bhagyashree D	Solution Admins	Org Admin	Active

## Manage Users

**Invite, Edit and Deactivate** - Manage (invite, edit and deactivate) the users in the organization.

**Assign Roles to Users** - Zinier has a number of predefined user roles which determine access rights in the platform (such as mobile app vs. web app access).

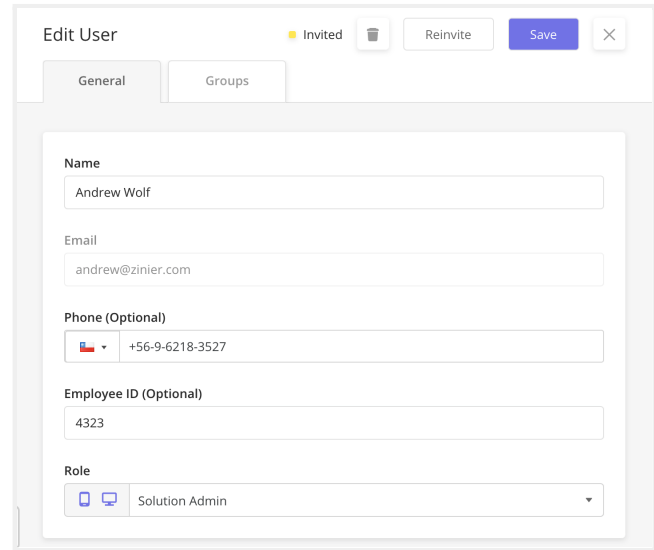
**Groups** - Add users to one or more Groups. Groups play several different roles in Zinier, including defining access to Mobile Projects, Web Apps, etc. Before a user can be assigned to a Group, it must first be created in the Users / Groups module.

**Bulk Upload Users** - Admins have the option of bulk uploading a group of users using a CSV file.



**View User Statuses** - View the status of a user in the system. Zinier users can have one of the following statuses:

- *Draft*: User is created in Zinier but does not have access to the platform
- *Invited*: User has application access, has received an invitation email, but has not finished setting up their account (i.e. has not accepted the invitation and set their password)
- *Active*: Users become Active once they finish creating their account
- *Deactivated*: The user is no longer able to access Zinier as an administrator has removed access. All of their data still remains in the system

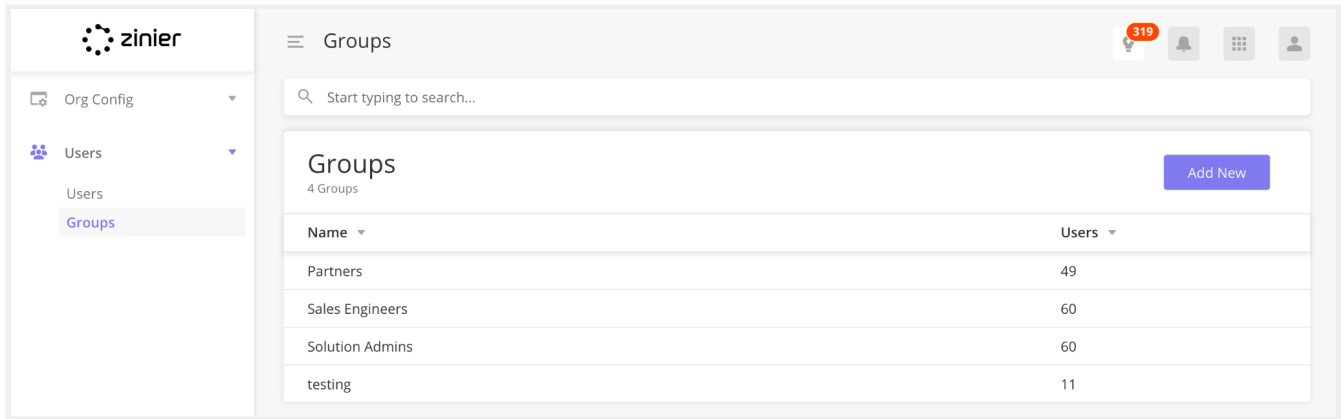


The screenshot shows the 'Edit User' interface. At the top, there is a title 'Edit User' and a status indicator 'Invited' with a yellow dot. To the right are buttons for 'Reinvite', 'Save', and a close icon. Below the title are two tabs: 'General' (selected) and 'Groups'. The main form area contains the following fields:

- Name**: Andrew Wolf
- Email**: andrew@zinier.com
- Phone (Optional)**: +56-9-6218-3527
- Employee ID (Optional)**: 4323
- Role**: Solution Admin

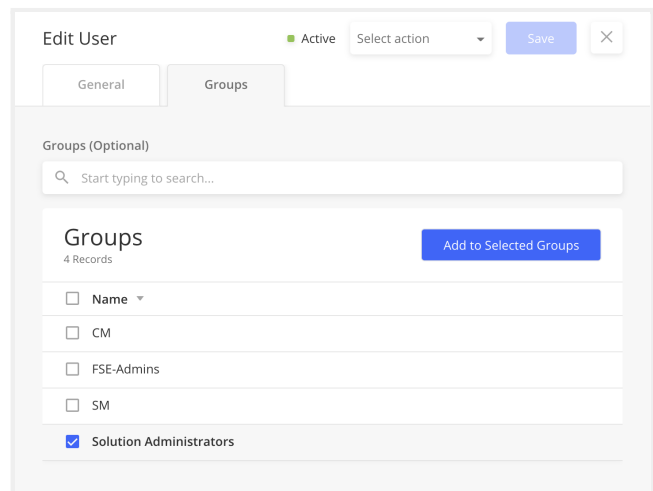
# Groups

Manage (add and edit) Groups in the organization. Once added, Users can then be assigned to one or more Groups from the Users module.




**Manage Groups** - Manage (add and edit) Groups in the organization. Groups can be assigned a group email address, used when email notifications are sent to the group.




**Manage Group Members** - View users assigned to a specific group and add users directly to a group.



# Technicians

Manage (add, edit and deactivate) the technicians in your workforce. Once a user has been invited to the org by the Admin, the user is then ready to be added to the Workforce.



Master: You are not in any Branch




## Technicians

19 Records

[Add New](#)

Status	Name	City	Shift	Phone Number
Active	Ambarish Ghosh	Singapore	Regular 9to5 Shift EST	+1000000000
Active	Andrew Wolf	Singapore	Weekday Shift SGT	+6584523203
Active	Arjun Ramachandra	Bengaluru	Weekend Shift SGT	
Active	Arun Chetty	San Mateo	Regular 9to5 Shift EST	+
Active	Ashish Paymode	Ciudad de México	Weekday Shift SGT	+525555555555
Active	Dinusha Prabanath	Singapore	Weekday Shift SGT	+
Active	Domingo Barros	San Mateo	Regular 9to5 Shift PST	+16502937752
Active	Jaime Juan	San Mateo	Regular 9to5 Shift EST	+14445556655
Active	Jazz Foo	Singapore	First Shift SGT	+
Active	Jimmy	San Francisco	Regular 9to5 Shift PST	+14153978828
Active	Jose Rabadan	San Mateo	Regular 9to5 Shift EST	+16667774455
Active	Kamayani Sharma	San Mateo	Weekend Shift SGT	+17775556677
Active	Kiran Kumar Chandapu	Bengaluru	Weekday Shift India	+919822222222
Active	Luis Martinez	Santiago Teyahualco	Regular 9to5 Shift EST	+122222222222
Active	Ronak Agrawal	Singapore	Weekday Shift SGT	+6586213164
Active	Snailin Inoa	Santo Domingo Este	Regular 9to5 Shift PST	+185994949

## Manage Technicians

**Provide Contact Details & Address / Home Base** - Edit contact information and address which is used as the “Home Base” of a technician when running Auto Scheduler

**Assign Work Groups** - Assign a Technician to Work Groups to set their task assignment eligibility based on Region, Work Order Type, Task Type, or Customer. Assign Technicians to the default "All" Work Group to open up their availability for assignment to any and all tasks.

Edit Andrew Wolf

■ Active
 Deactivate
Save
✕

Technician Information

Skills

Work Schedule

Contractors

?

**General Information**

Name

Email

**Shift & Work Group**

Shift

Work Group  ✕ | ?

**Contact Information**

Address

City

State

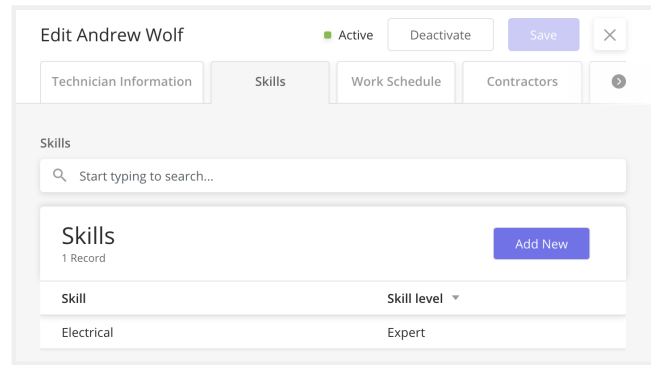
Postal Code

Country

Contact Phone

**Assign Skills & Skill Levels** - Assign Skills and Skill Levels to Technicians which are used by the Tech Recommendation / Auto Scheduler when matching a technician to a task type.

Skills and Skill Levels must first be added in Settings-Workforce Settings. Once added, the Skill/Skill Level can be assigned to a Tech.



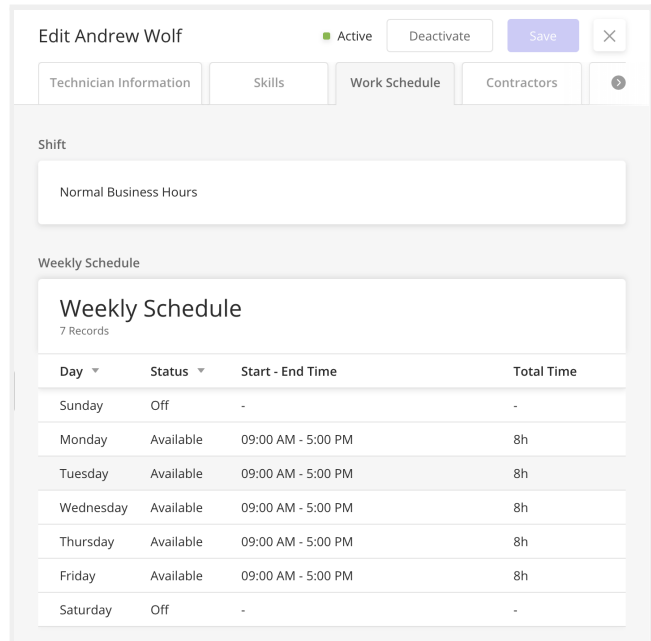
Skills

1 Record

Skill	Skill Level
Electrical	Expert

**Assign Work Schedule / Shift** - Define the technician's Work Schedule which is used to determine the availability of a technician when scheduling and dispatching. This includes Leave, Overtime, and Shift.

**Weekly Schedule** - Gets auto-filled based on the selected shift. Shifts can be managed in Settings-Workforce Settings.



Shift

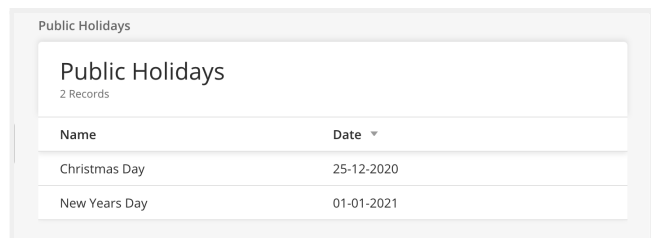
Normal Business Hours

Weekly Schedule

7 Records

Day	Status	Start - End Time	Total Time
Sunday	Off	-	-
Monday	Available	09:00 AM - 5:00 PM	8h
Tuesday	Available	09:00 AM - 5:00 PM	8h
Wednesday	Available	09:00 AM - 5:00 PM	8h
Thursday	Available	09:00 AM - 5:00 PM	8h
Friday	Available	09:00 AM - 5:00 PM	8h
Saturday	Off	-	-

**View Public Holidays** - View the public Holidays associated with the assigned Shift. Public holidays block off the tech's calendar and restrict tasks from being auto-scheduled on the given holidays.



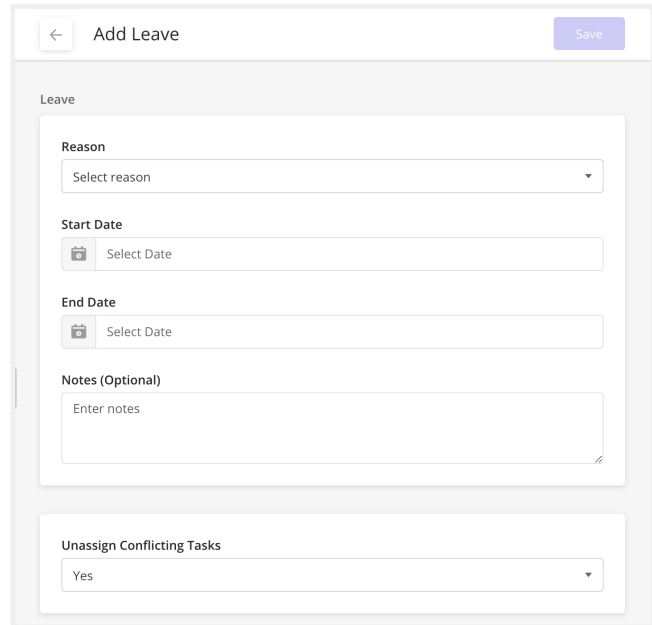
Public Holidays

2 Records

Name	Date
Christmas Day	25-12-2020
New Years Day	01-01-2021

**Add Leave** - Add Leave to a tech's calendar which blocks off the availability from their calendar during the allotted times.

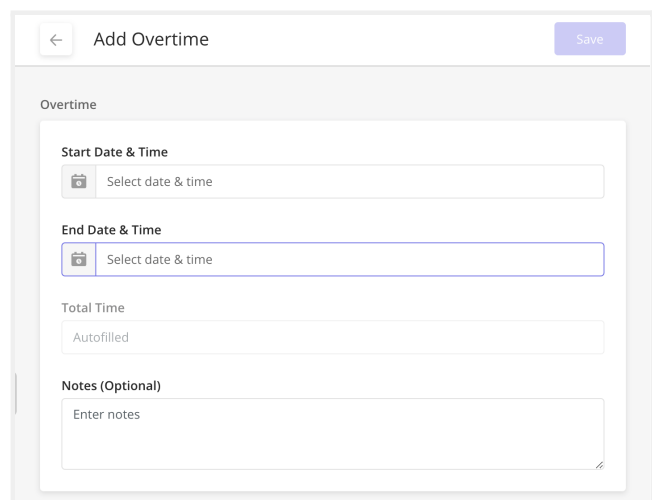
You can choose to automatically un-assign tasks that are conflicting with the leave.



The 'Add Leave' form includes the following fields:

- Reason:** A dropdown menu with the placeholder text 'Select reason'.
- Start Date:** A date picker with the placeholder text 'Select Date'.
- End Date:** A date picker with the placeholder text 'Select Date'.
- Notes (Optional):** A text area with the placeholder text 'Enter notes'.
- Unassign Conflicting Tasks:** A dropdown menu with the selected option 'Yes'.

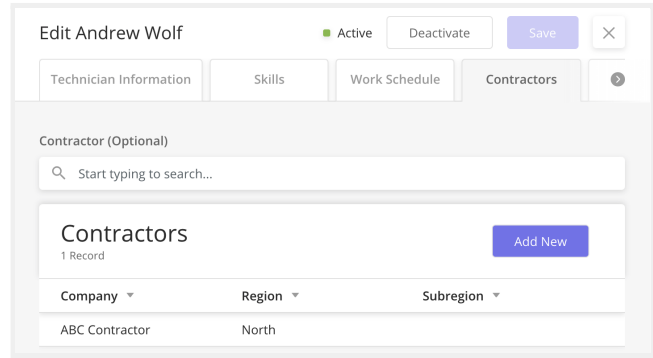
**Add Overtime** - Add Overtime to a tech's calendar which adds availability to their calendar during the allotted times.



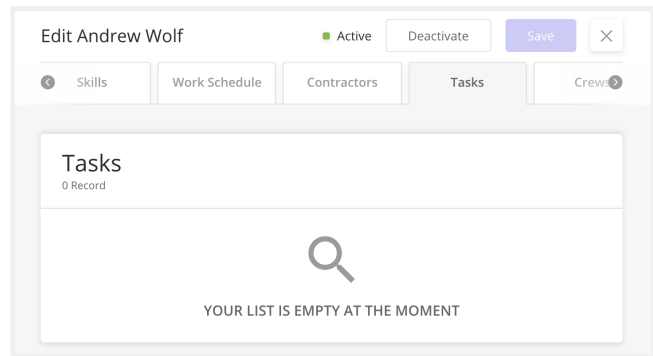
The 'Add Overtime' form includes the following fields:

- Start Date & Time:** A date and time picker with the placeholder text 'Select date & time'.
- End Date & Time:** A date and time picker with the placeholder text 'Select date & time'.
- Total Time:** A text field with the placeholder text 'Autofilled'.
- Notes (Optional):** A text area with the placeholder text 'Enter notes'.

**Assign a Contractor** - Optionally assign a Technician to a Contractor. More on contractors can be found in the section below.



**View Task Logs** - View the task logs of the technician.



## Crews

Create a Crew in order to assign multiple technicians to a single task. Crews must have a start and end date, base location, shift, and work group(s), and can optionally be created for a specific contractor.

☰ Crews
6271

- 🏠 Dashboards
- 👥 Workforce
  - Field Force
  - Web Users
  - Contractors
  - Work Groups
- 📄 Work Orders
- 📅 Task Scheduling
- 📦 Inventory
- 🏠 Assets
- 👤 Customers
- 📖 Catalog
- ⚙️ Settings

Technicians **Crews**

🔍 Start typing to search...

### Crew List

15 Records Add New

Status	Crew Name	Region	Start Date	End Date
🔴 Deactivated	AP-001	West	09-11-2020	13-11-2020
🔴 Deactivated	AP-002	West	19-11-2020	20-11-2020
🔴 Draft	AP-003	West	19-11-2020	31-12-2021
🔴 Deactivated	Ashley's Crew	Central	22-12-2020	22-01-2021
🔴 Deactivated	BART Crew	West	10-02-2021	13-02-2021
🔴 Deactivated	CrewPreview	Central	17-12-2020	22-04-2021
🔴 Draft	CrewSupport	South	07-01-2021	21-09-2022
🔴 Deactivated	CrewSupport	South	11-12-2020	31-12-2020
🔴 Draft	Priya's Test Crew	North	08-03-2021	31-03-2021
🔴 Draft	Priya's Testing Crew	North	08-03-2021	31-03-2021
🔴 Deactivated	Ronak's Crew	North	01-11-2020	21-05-2021
🔴 Deactivated	Test Crew	North	22-02-2021	24-02-2021
🔴 Draft	Test Crew_PM	North	02-03-2021	05-03-2021
🔴 Deactivated	Testing Crew_Priya	North	02-03-2021	05-03-2021
🔴 Draft	Trupti's crew	East	23-12-2020	21-01-2021

🔍 Start typing to search...

### Crew Members

1 Record Edit Crew

Status	Name	City	Contractor	Skills
🟢 On Crew	Siva Malyala	Fremont	-	-

© Zinier, Inc. | Proprietary and Confidential | Last Update: 29/06/2021

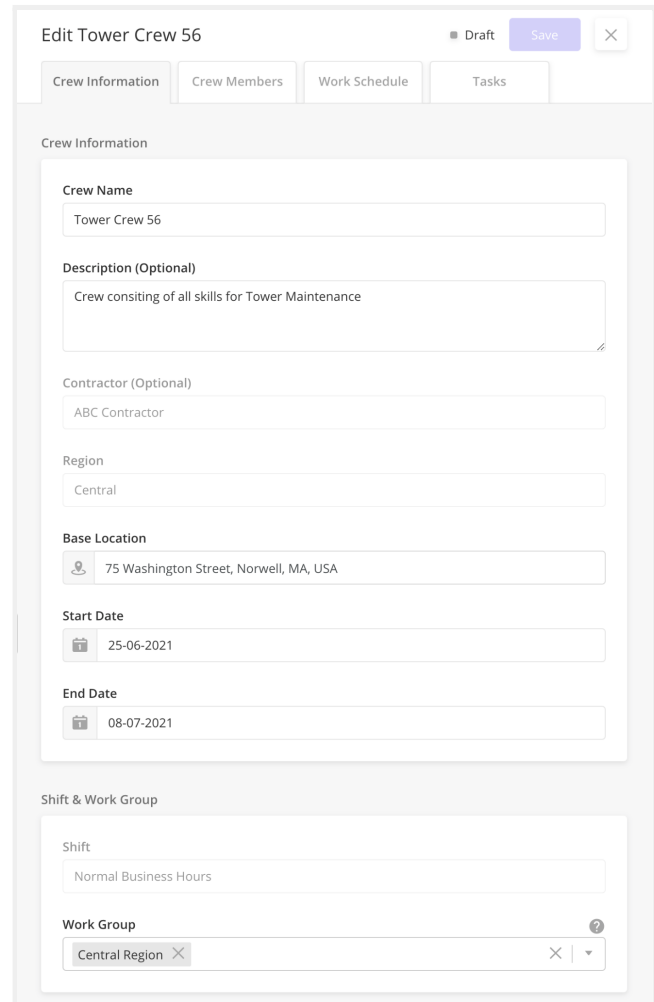
Page 60



## Manage Crews

Use the in-built filters to narrow down the list of technicians to add to the Crew such as contractor, availability, shift, region, etc. Note that technicians can only belong to one crew at a time so any users who are already on a crew will not be shown in the list when adding new members. All Crews must have a Crew Lead in order to move to "Active" status.

Crews can only be assigned to a task if the task type can be assigned to a Crew. This can be configured in Settings - Work Order Settings - Task Types.



Edit Tower Crew 56 Draft Save X

Crew Information | Crew Members | Work Schedule | Tasks

Crew Information

**Crew Name**  
Tower Crew 56

**Description (Optional)**  
Crew consisting of all skills for Tower Maintenance

**Contractor (Optional)**  
ABC Contractor

**Region**  
Central

**Base Location**  
75 Washington Street, Norwell, MA, USA

**Start Date**  
25-06-2021

**End Date**  
08-07-2021

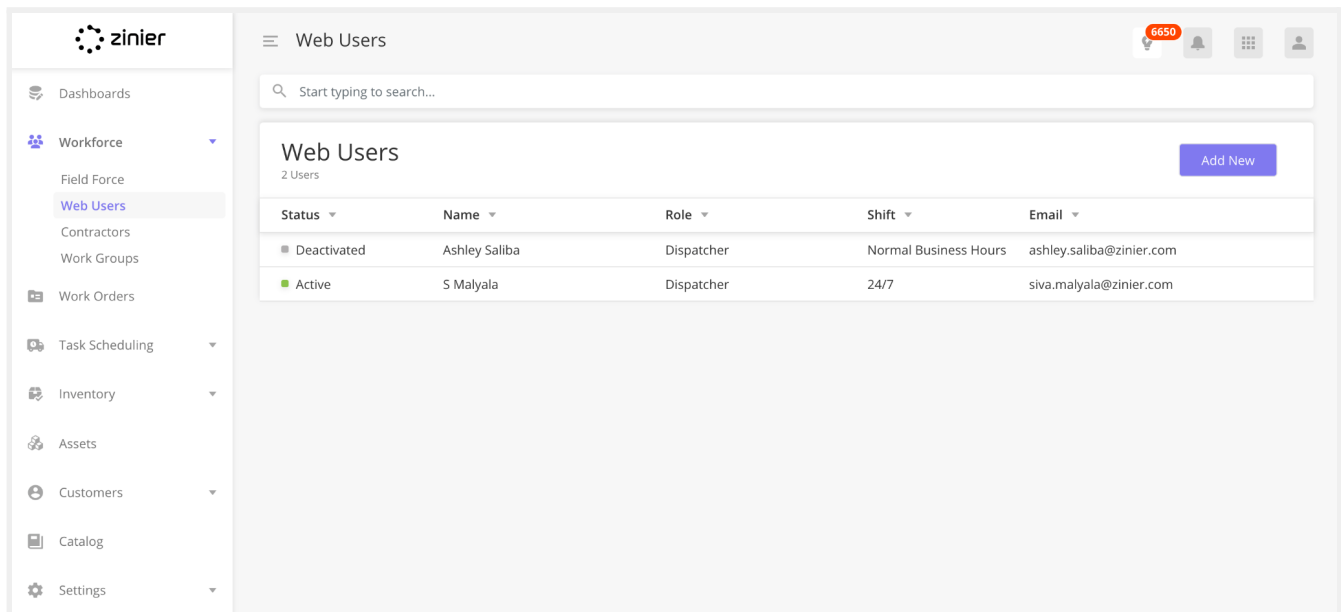
Shift & Work Group

**Shift**  
Normal Business Hours

**Work Group**  
Central Region

## Web Users

Manage (add, edit and deactivate) users of FSE on the web (i.e. "Web Users") such as dispatchers, coordinators, inventory managers, project managers, etc. Once a user has been invited to the org by the Admin as a User, they are then ready to be added to the Web Users module in Workforce in order to track their contact information in FSE, shift, leave, overtime, etc.



The screenshot shows the Zinier Web Users management interface. On the left is a sidebar with navigation options: Dashboards, Workforce (expanded to show Field Force, Web Users, Contractors, Work Groups), Work Orders, Task Scheduling, Inventory, Assets, Customers, Catalog, and Settings. The main content area is titled "Web Users" and shows a search bar with the text "Start typing to search...". Below the search bar is a table with the following data:

Status	Name	Role	Shift	Email
Deactivated	Ashley Saliba	Dispatcher	Normal Business Hours	ashley.saliba@zinier.com
Active	S Malyala	Dispatcher	24/7	siva.malyala@zinier.com

An "Add New" button is located in the top right corner of the table area. The top right of the interface includes a notification bell with "6650", a grid icon, and a user profile icon.

## Manage Web Users

**Provide Contact Details & Address** - Maintain contact information for Web Users such as their phone number and address.

**Assign Work Groups** - Assign a Web User to Work Groups to filter the tasks and technicians they see in the Task Scheduling module based on Region, Work Order Type, Task Type, or Customer. Assign Web Users to the default "All" work group and they will be able to see all tasks and all technicians in the Task Scheduling module, in both the List and Calendar Views.

**Assign Work Schedule / Shift** - Assign each web user a shift to keep track of normal working hours for back-office staff.

Edit Akshay J

■ Active
 Deactivate
Save
✕

Web User Information

Work Schedule

**General Information**

Name

Email

Role (Optional)

**Shift & Work Group**

Shift

Work Group

**Contact Information (Optional)**

Address

City

State

Postal Code

Country

Contact Phone

**Assign Work Schedule / Shift** - Assign each web user a shift to keep track of normal working hours for back-office staff.

**View Public Holidays** - View all public holidays observed by each web user according to their selected shift to ensure back-office support is available when needed.

**Add Leave** - Add leave for web users to block out their availability.

**Add Overtime** - Add overtime to web user's calendars to schedule them to work outside of their normal shift or on a public holiday.

Edit Akshay J
Active
Deactivate
Save
✕

Web User Information

Work Schedule

**Shift**

Shift  
 Weekday Shift India


**Weekly Schedule**

7 Records

Day	Status	Start - End Time	Total Time
Sunday	Off	-	-
Monday	Available	11:30 AM - 7:30 PM	8h
Tuesday	Available	11:30 AM - 7:30 PM	8h
Wednesday	Available	11:30 AM - 7:30 PM	8h
Thursday	Available	11:30 AM - 7:30 PM	8h
Friday	Available	11:30 AM - 7:30 PM	8h
Saturday	Off	-	-


**Public Holidays**

0 Record

  
 YOUR LIST IS EMPTY AT THE MOMENT

**Leave**

0 Record Add New

  
 YOUR LIST IS EMPTY AT THE MOMENT

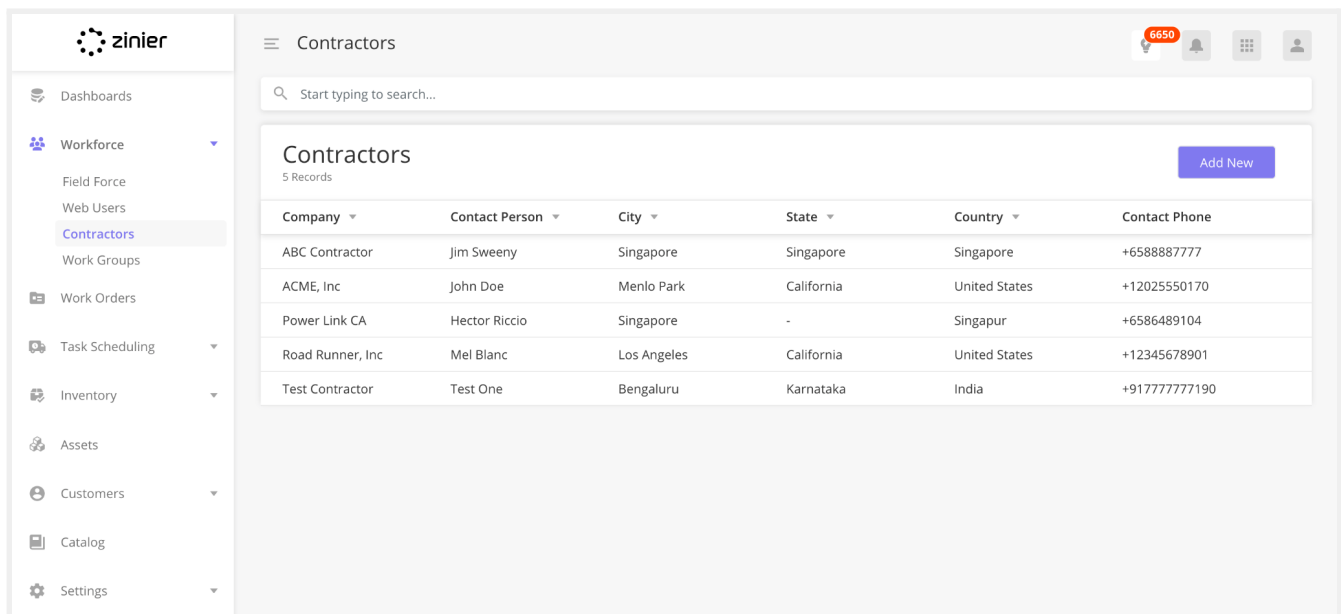
**Overtime**

0 Record Add New

## Contractors

Manage (add, edit) the Contractors in your workforce. Contractors are used as part of the matching criteria when assigning a Technician to a Task at a Customer Site. When Technicians are added to

Contractor, they are associated with the Region and Subregion of the Contractor. Similarly, Customer Sites - where tasks are performed – can be associated with a Region and Sub-region. Thus when the Tech Recommendation attempts to match a Technician with a Task, it will check to see if the Region of the Customer Site matches the Region of the Contractor. If the Technician is associated with a Contractor with the same Region as the Customer Site, the Technician can be assigned to Tasks performed at the Customer Site.



The screenshot shows the Zinier web application interface. On the left is a sidebar with navigation options: Dashboards, Workforce (with sub-items: Field Force, Web Users, Contractors, Work Groups), Work Orders, Task Scheduling, Inventory, Assets, Customers, Catalog, and Settings. The main content area is titled 'Contractors' and shows a search bar with the text 'Start typing to search...'. Below the search bar is a table with 5 records. The table has columns for Company, Contact Person, City, State, Country, and Contact Phone. An 'Add New' button is located in the top right corner of the table area.

Company	Contact Person	City	State	Country	Contact Phone
ABC Contractor	Jim Sweeny	Singapore	Singapore	Singapore	+6588887777
ACME, Inc	John Doe	Menlo Park	California	United States	+12025550170
Power Link CA	Hector Riccio	Singapore	-	Singapur	+6586489104
Road Runner, Inc	Mel Blanc	Los Angeles	California	United States	+12345678901
Test Contractor	Test One	Bengaluru	Karnataka	India	+91777777190

## Manage Contractors

**General Information** - Add the contact information (point of contact) and base location of the contractor.

### Assign Regions / Sub-regions to a Contractor

- Regions are (optionally) used as part of the matching criteria when assigning a tech to a task at the site. If the tech is associated with a Contractor with the same region as the customer site, the tech can be assigned to tasks performed at the site.

**View Assigned Techs** - View a list of the Technicians assigned to a contractor.

Edit Contractor
Save ✕

Contractor Information
Regions
Technicians

**General Information**

**Contractor Company**

**Description (Optional)**

**Contact Information**

**Contact Name**

**Contact Title**

**Contact Email**

**Contact Phone**

**Location Information**

**Address**

**City**

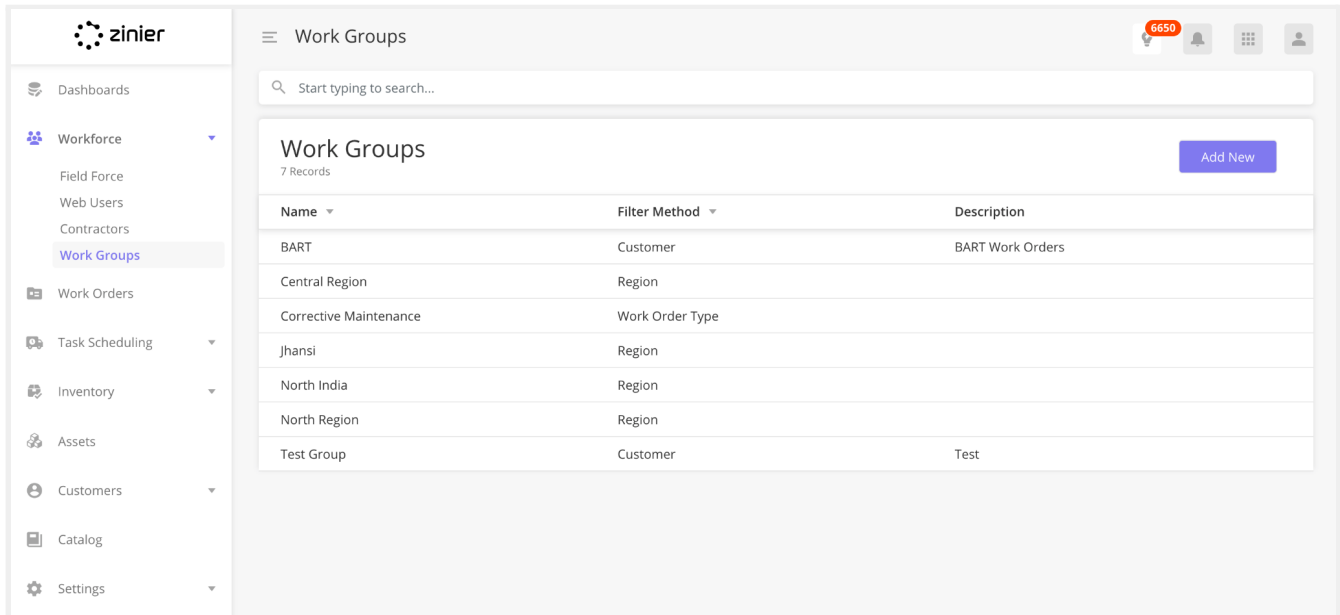
**State (Optional)**

**Postal Code**

**Country**

## Work Groups

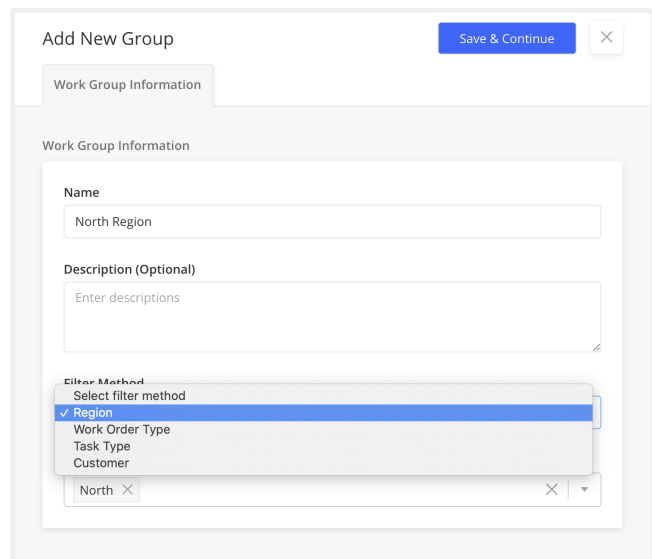
Create Work Groups in order to filter Tasks and Technicians so dispatchers can focus only on their area of responsibility.



Name	Filter Method	Description
BART	Customer	BART Work Orders
Central Region	Region	
Corrective Maintenance	Work Order Type	
Jhansi	Region	
North India	Region	
North Region	Region	
Test Group	Customer	Test

## Manage Work Groups

Create Work Groups in order to filter Tasks and Technicians so dispatchers can focus only on their area of responsibility.



Work Groups can be created based on the following filters:

- Region: When added to Region Work Groups, Dispatchers see only Tasks belonging to the Region in the Task Scheduling module and can only assign technicians to those tasks who also belong to the same Region.
- Work Order Type: Dispatchers only see Tasks belonging to certain WO Types and Technicians can only be assigned if they belong to the same WO Type work group
- Task Type: Dispatchers only see Tasks of certain Task Types and Technicians can only be assigned if they belong to the same Task Type work group
- Customer: Dispatchers can only see Tasks for certain Customers and can only assign Technicians to those Tasks who also belong to the same Work Group.

---

## **Assign Technicians and Web Users to Work Groups**

Add Technicians and Web Users to Work Groups. One user (Web User or Technician) can belong to multiple Work Groups. Note the logic for multiple group membership:

### **If a user belongs to multiple groups of the same Filter Method**

- If a user belongs to multiple groups of the same Filter Method (example: Two "Region" work groups), an "or" operator is applied so they see tasks and technician for all Work Groups they belong to for that type.
- For example: if I belong to a work group for Region = "North" and Region = "West" I will see all Tasks and Technicians for North and West regions.

### **If a user belongs to multiple groups of different filter methods**

- If a user belongs to multiple groups of different filter methods (example: one Region work group and one Task Type work group), an "and" operator is applied so they see a filtered list of tasks and technicians based on both of those filters.
- Example: I belong to a work group for Region: North and Task Type: Corrective Maintenance so I only see Corrective Maintenance Tasks in the North Region.

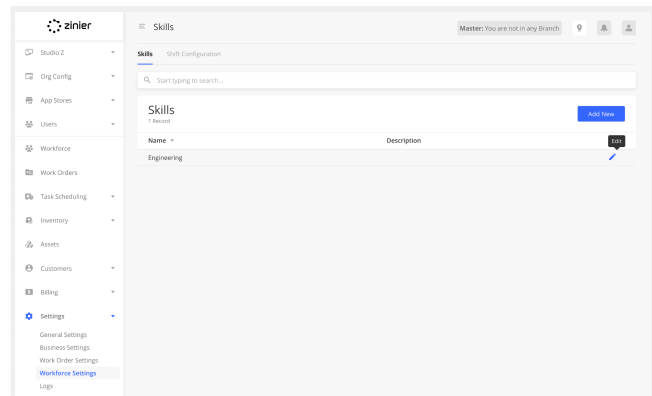


## Workforce Management Settings

The following section describes the various settings associated with managing your Workforce.

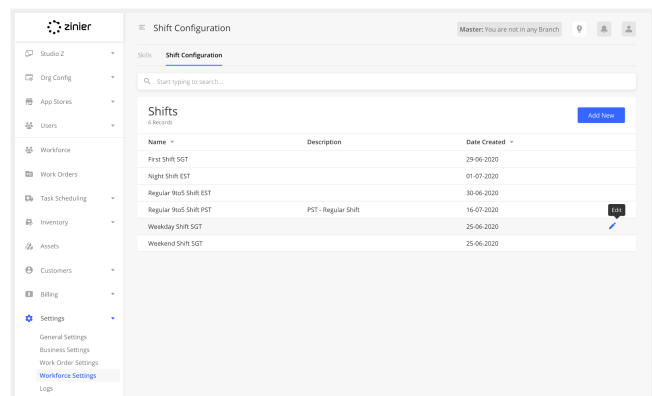
**Manage Skills & Skill Levels** - Define a master list of Skills and Skill Levels. Once defined, these can be assigned to Technicians (and Task Types) and used by the Tech Recommendation / Auto Scheduler.

Skills and Skill Levels must first be added in Settings / Workforce Settings. Once added, the Skill/Skill Level can be assigned to a Tech.



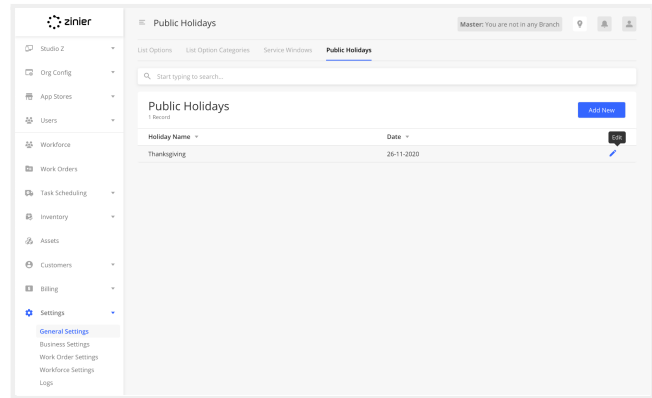
**Manage Shifts** - Define (add and edit) a master list of Shift Configurations. Shifts define the weekly schedule and public holidays for a technician and are used to determine the availability of a technician when scheduling and dispatching. Once defined, Shifts can be assigned to Technicians.

A Shift must first be added in Settings / Workforce Settings. Once added, the Shift can be assigned to a Tech.



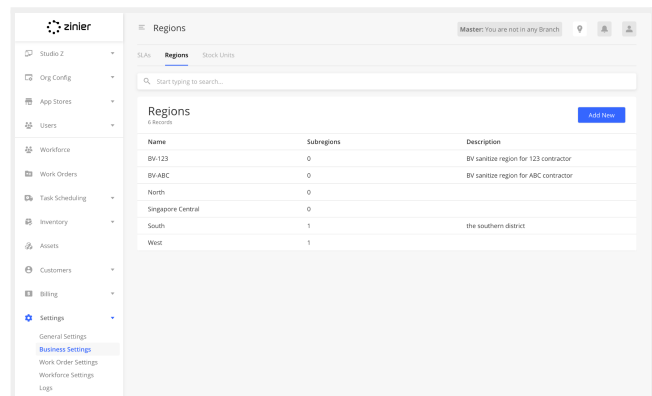
## Public Holidays

Define (add and edit) a master list of Public Holidays for the Org. Once added, a Public Holiday can be applied to a Shift to block off the tech's calendar and restrict tasks from being auto-scheduled on the given holidays.



## Regions / Sub-Regions

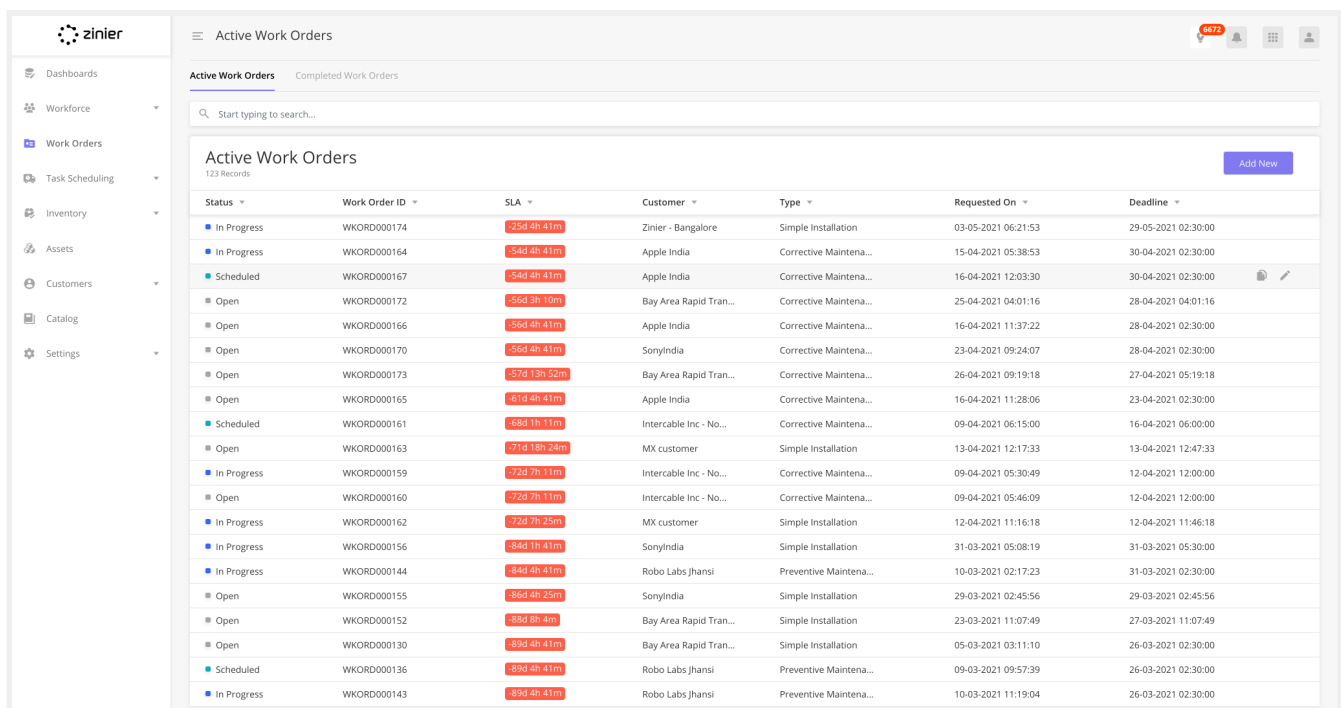
Define (add and edit) a master list of Regions / Sub-regions. Regions are (optionally) used as part of the matching criteria when assigning a Technician to a Task at a Customer Site. When the Tech Recommendation attempts to match a Technician with a Task, it will check to see if the Region of the Customer Site matches the Region(s) of the Contractor(s) the Technician is associated with. If the Technician is associated with a Contractor with the same Region as the Customer Site, the Technician can be assigned to Tasks performed at the Customer Site. Once added, a Region can be assigned to a Contractor and Customer Sites.



# Work Order Management

## Work Order

Work Orders capture all the information needed for a field service technician to complete fieldwork for a customer. Work Orders can contain any number of tasks which are then sent to the Scheduling & Dispatch module for deployment. In addition to being the vehicle for deploying tasks to the field, Work Orders also allow you to track the use of parts, Consumables, and Resources needed to complete those tasks. of Active and Completed Work Orders.



The screenshot displays the 'Active Work Orders' section of the Zinier software. It features a sidebar with navigation options like Dashboards, Workforce, Work Orders, Task Scheduling, Inventory, Assets, Customers, Catalog, and Settings. The main content area shows a table of 123 records. The table columns include Status, Work Order ID, SLA, Customer, Type, Requested On, and Deadline. Each row represents a work order with its current status and associated details.

Status	Work Order ID	SLA	Customer	Type	Requested On	Deadline
In Progress	WKORD000174	25d 4h 41m	Zinier - Bangalore	Simple Installation	03-05-2021 06:21:53	29-05-2021 02:30:00
In Progress	WKORD000164	54d 4h 41m	Apple India	Corrective Maintena...	15-04-2021 05:38:53	30-04-2021 02:30:00
Scheduled	WKORD000167	54d 4h 41m	Apple India	Corrective Maintena...	16-04-2021 12:03:30	30-04-2021 02:30:00
Open	WKORD000172	56d 3h 10m	Bay Area Rapid Tran...	Corrective Maintena...	25-04-2021 04:01:16	28-04-2021 04:01:16
Open	WKORD000166	56d 4h 41m	Apple India	Corrective Maintena...	16-04-2021 11:37:22	28-04-2021 02:30:00
Open	WKORD000170	56d 4h 41m	SonyIndia	Corrective Maintena...	23-04-2021 09:24:07	28-04-2021 02:30:00
Open	WKORD000173	57d 13h 52m	Bay Area Rapid Tran...	Corrective Maintena...	26-04-2021 09:19:18	27-04-2021 05:19:18
Open	WKORD000165	61d 4h 41m	Apple India	Corrective Maintena...	16-04-2021 11:28:06	23-04-2021 02:30:00
Scheduled	WKORD000161	68d 1h 11m	Intercable Inc - No...	Corrective Maintena...	09-04-2021 06:15:00	16-04-2021 06:00:00
Open	WKORD000163	71d 18h 24m	MX customer	Simple Installation	13-04-2021 12:17:33	13-04-2021 12:47:33
In Progress	WKORD000159	72d 7h 11m	Intercable Inc - No...	Corrective Maintena...	09-04-2021 05:30:49	12-04-2021 12:00:00
Open	WKORD000160	72d 7h 11m	Intercable Inc - No...	Corrective Maintena...	09-04-2021 05:46:09	12-04-2021 12:00:00
In Progress	WKORD000162	72d 7h 25m	MX customer	Simple Installation	12-04-2021 11:16:18	12-04-2021 11:46:18
In Progress	WKORD000156	84d 1h 41m	SonyIndia	Simple Installation	31-03-2021 05:08:19	31-03-2021 05:30:00
In Progress	WKORD000144	84d 4h 41m	Robo Labs Jhansi	Preventive Maintena...	10-03-2021 02:17:23	31-03-2021 02:30:00
Open	WKORD000155	86d 4h 25m	SonyIndia	Simple Installation	29-03-2021 02:45:56	29-03-2021 02:45:56
Open	WKORD000152	88d 8h 4m	Bay Area Rapid Tran...	Simple Installation	23-03-2021 11:07:49	27-03-2021 11:07:49
Open	WKORD000130	89d 4h 41m	Bay Area Rapid Tran...	Simple Installation	05-03-2021 03:11:10	26-03-2021 02:30:00
Scheduled	WKORD000136	89d 4h 41m	Robo Labs Jhansi	Preventive Maintena...	09-03-2021 09:57:39	26-03-2021 02:30:00
In Progress	WKORD000143	89d 4h 41m	Robo Labs Jhansi	Preventive Maintena...	10-03-2021 11:19:04	26-03-2021 02:30:00

Work Orders can have one of the following statuses:

- **Open** - Work Order is saved and tasks can be added. In Open status, the Work Order can be edited and/or canceled.
- **Scheduled** - At least one task in the Work Order has been published and is in one of these statuses: Scheduled, In Progress, Pending Review, Reopened. In this state, the work order can be edited or canceled.

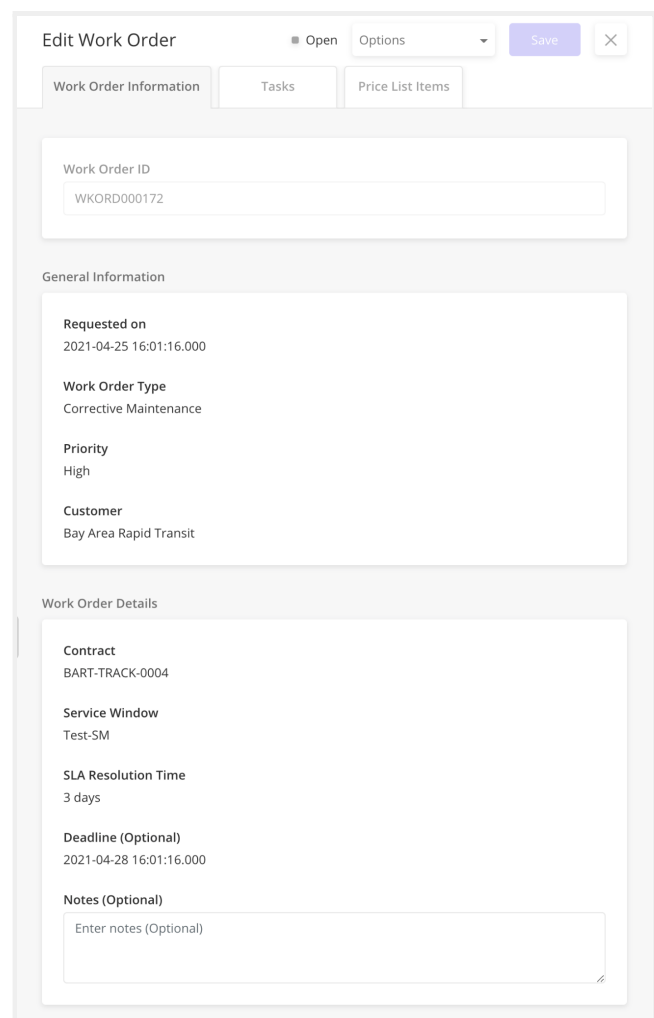
- **Completed** - When all tasks within the Work Order are completed, the Work Order automatically transitions to Completed status. Completed Work Orders may contain one or more tasks that have been canceled, but at least one was completed.
- **Canceled** - This status indicates the Work Order was canceled by a web user. All tasks which were not previously completed are also canceled by default when the parent work order is canceled. Canceled Work Orders and Tasks cannot be reopened.

## Manage Work Orders

**Add, Edit & Cancel** - Manage (add new, edit and cancel) Work Orders.

**Work Order Template** Save as a Work Order Templates saves a Work Order as a Work Order Template. Work Order Templates make it faster and easier to create Work Orders by pre-populating the fields with frequently used configurations.

**Work Order Type** - Assign a Work Order Type. Work Order Types do any type of work required in the field. Work Order Types must first be added in Settings / Work Order Settings. Once added, Work Order Type can be assigned to a WO.



**Priority** - SLA, Priority, and Deadlines: The Priority you select for a Work Order has a direct relationship to the SLA you choose for that Work Order, so it is important to be mindful of how this relationship works. SLAs use the concept of Priority Time Frames which tie a particular SLA

Resolution Time to the particular Priority you set when creating a Work Order. When you select a Priority for the Work Order, it will take the SLA Resolution Time and use that to calculate the default Deadline for the Work Order and Tasks added to the Work Order.

Priorities are added by the Solutions Admin. FSE comes with the following Default priorities: Low, Medium, High

**Customer** - Assign a Customer to a Work Order. The customer determines which Contracts can be added to a WO and which Customer Sites a task added to the Work Order can be assigned to.

Customers must first be added from the Customers module. Once added, a Customer can then be assigned to a Work Order.

**Contract** - Select the contract which is tied to the Work Order. This list is populated based on the Customer (a Customer may have more than 1 Contract) and determines the SLA and Service Window used in the Work Order.

Contracts must first be added from the Contracts module. Once added, a Contract can then be assigned to a Work Order.

**Parts and Materials (Updated V2.6)** - Optionally add parts and materials to tasks from the Catalogs to track estimated and actual quantities used to properly bill the customer for items used to fulfill the task. This tracking needs to be done manually and there's no integration with Inventory, Stock Locations, or the standard mobile workflows at this time. This can optionally be added as customization during the implementation process.

---

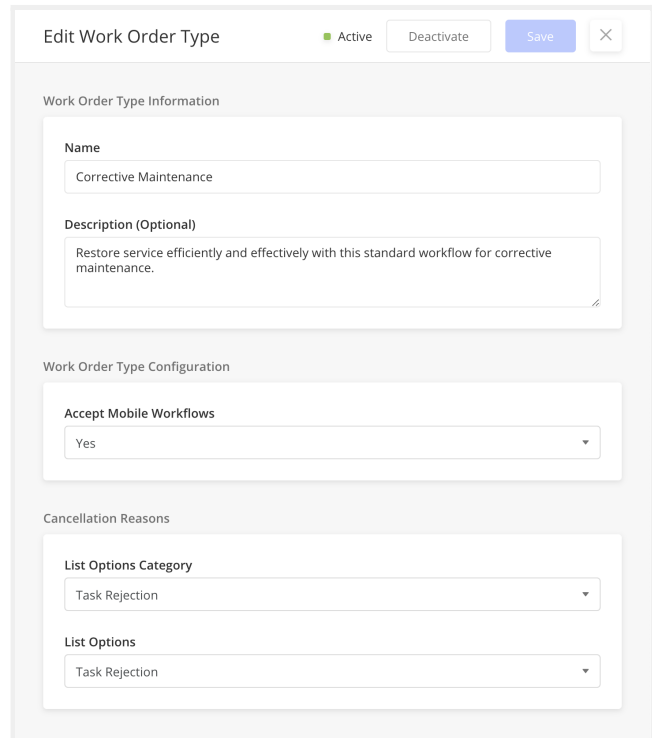
## Work Order Settings

Work Orders Settings are managed in a few different modules in FSE.

## Work Order Types (Updated V2.7)

Define Work Order Types which are used to configure settings such as which List Option to use when canceling a Work Order and whether or not a Work Order can contain mobile tasks.

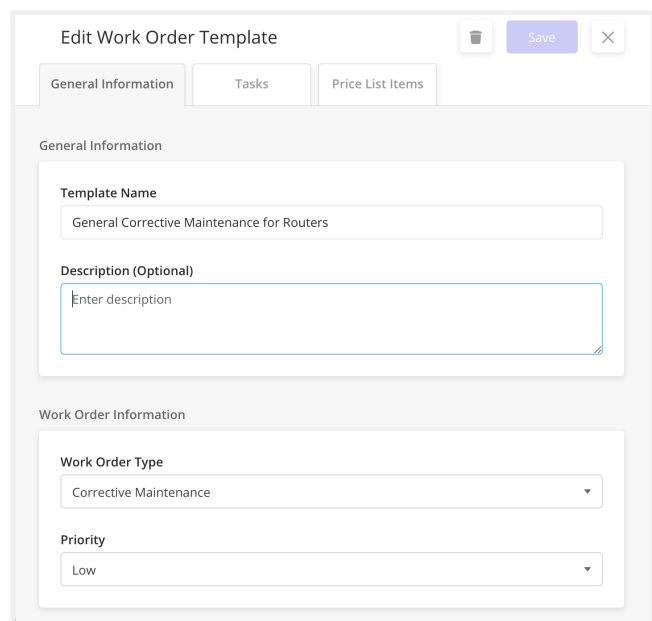
**Pre-configured Work Order Types - FSE** comes with 3 pre-configured Work Order Types associated with the Standard Mobile Workflows that come out of the box: Corrective Maintenance, Preventive Maintenance, and Simple Installation. For more information, view the Standard Mobile Workflows section.



## Work Order Templates

Edit and delete Work Order Templates created from the Work Orders module. Work Order Templates make it faster and easier to create Work Orders by pre-populating the fields with frequently used configurations.

Existing work Order Templates can be managed in Settings - Work Order Settings - Work Order Templates.



## SLAs

Configure different SLA Resolution Times for each Work Order Priority (Low, Medium, High, etc.) to enforce specific contract terms and assist with scheduling and dispatch. SLAs are tied to Work Orders by Customer Contracts. SLA Resolution Time and Default Deadline are pre-populated based on the Contract assigned to the Work Order.

SLAs use the concept of Priority Time Frames which tie a particular SLA Resolution Time to the particular Priority you set when creating a Work Order. When you select a Priority for the Work Order, it will take the SLA Resolution Time and use that to calculate the default Deadline for the Work Order and Tasks added to the Work Order.

SLAs must first be added in Settings - Business Settings. Once added, an SLA can be assigned to a Contract which then ties it to the Work Order.

Edit SLA
Save ✕

**General Information**

**Name**

**Description (Optional)**

**SLA Time Frames**

**SLA Time Frames**

2 Records

Add New

Priority	Resolution Time	Edit
High	3d	<span style="color: blue;">✎</span>
Medium	5d	

## Service Windows

Service Windows determine the hours of operation when a task can be performed at a customer Site associated with the task in the Work Order. When adding Tasks to a Work Order, it must be assigned a Customer Site, which is the location at which the task must be performed.

The Service Window is pre-populated based on the Contract assigned to the Work Order.

Service Windows must first be added in Settings - Business Settings. Once added, a Service Window can be assigned to a Contract which then ties it to the Work Order.

**Set a Default Service Window** - Set the default Service Windows used by the organization. The default value will then be used when creating Contracts.

Edit Service Window
Save ✕

**General Information**

**Name**

**Description (Optional)**

**Weekly Schedule**

7 Records

Day	Status	Opening Time	Closing Time	Hours
Sunday	Closed	-	-	-
Monday	Open	09:00:00	05:00:00	8h
Tuesday	Open	09:00:00	05:00:00	8h
Wednesday	Open	09:00:00	05:00:00	8h
Thursday	Open	09:00:00	05:00:00	8h
Friday	Open	09:00:00	05:00:00	8h
Saturday	Closed	-	-	-

**Public Holidays**

**Public Holidays**

0 Record Add New

🔍  

YOUR LIST IS EMPTY AT THE MOMENT



# Tasks in Work Orders

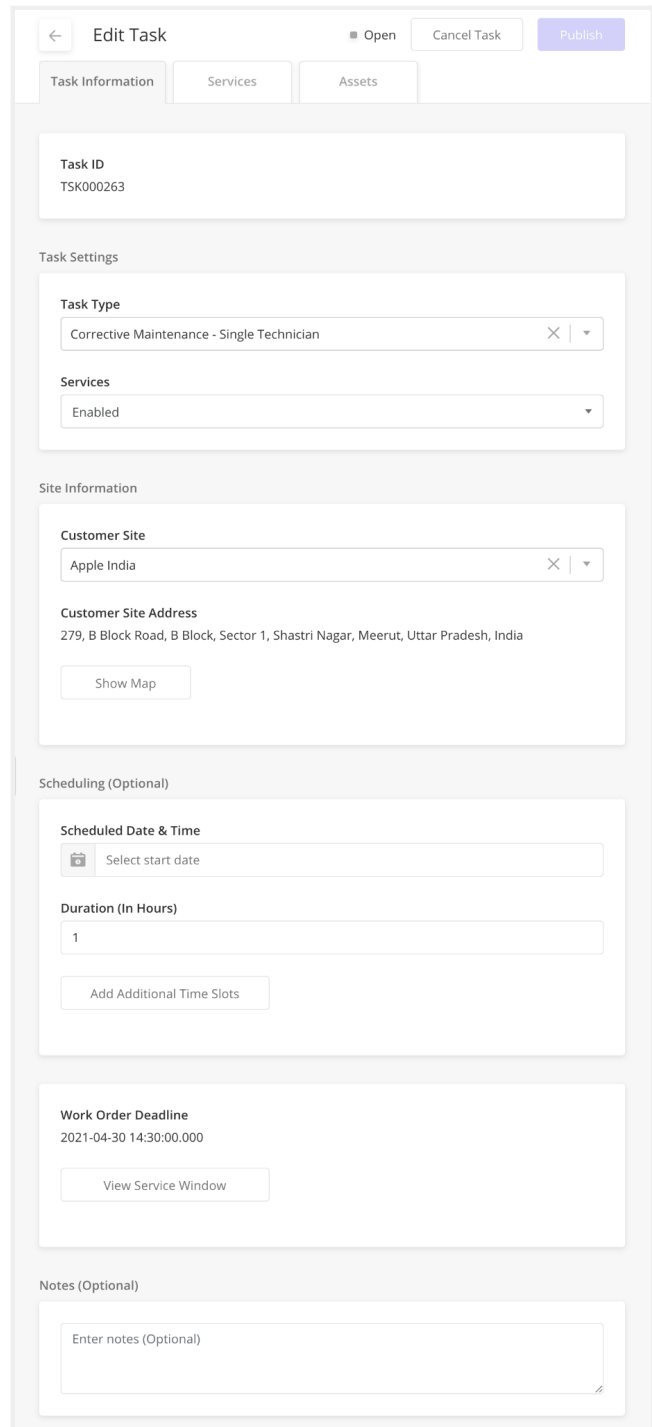
## Manage Tasks

**Add, Edit, Publish & Cancel** - Add tasks to a Work Order, Save as Draft or Publish a Task, which sends the task to Task Scheduling for dispatch.

**Assign a Task Type (Updated V2.7)** - All tasks added to a Work Order must have a Task Type. Task Types define the configuration of a task, including the Mobile Workflow, the results model and results side panel, the default estimated duration, the Skills and Skill Levels required, and the task approval settings. For more information, see the Task Types section below.

Task Types must first be added in Settings / Work Order Settings. Once added, Task Type can be assigned to a task in a Work Order.

**Pre-configured Tasks Types** - FSE comes with several pre-configured Task Types associated with the Standard Mobile Workflows that come out of the box: Corrective Maintenance, Corrective Task Request, Preventive Maintenance, Simple Installation, and Site Change Request. For more information on the different Task Types, see the section on Standard Mobile Workflows.



← Edit Task ■ Open Cancel Task Publish

Task Information Services Assets

Task ID  
TSK000263

Task Settings

Task Type  
Corrective Maintenance - Single Technician X | ▾

Services  
Enabled ▾

Site Information

Customer Site  
Apple India X | ▾

Customer Site Address  
279, B Block Road, B Block, Sector 1, Shastri Nagar, Meerut, Uttar Pradesh, India

Show Map

Scheduling (Optional)

Scheduled Date & Time  
Select start date

Duration (In Hours)  
1

Add Additional Time Slots

Work Order Deadline  
2021-04-30 14:30:00.000

View Service Window

Notes (Optional)

Enter notes (Optional)

**Provide an Estimated Duration** - The estimated duration is used in Task Scheduling to determine the block of time a task takes to complete. The default value comes from the Task Type but can be overridden when added to a Work Order. It is also seen by technicians when they browse their task list on the mobile app. For example, if a user is assigned a task at 9:00 am and the duration is 60 minutes, the task will then show 9:00 am - 10:00 am in their task list.

**Assign to a Customer Site** - The Customer Site table is auto-populated with sites associated with the Customer you select for the Work Order. This is an important field as if the Mobile Workflow requires a Geo-Check In, it will use the GPS coordinates (Lat/Long) of this site as the check-in location.

Customer Sites must first be added from the Customers / Customer Sites module. For more details, see the Customers section below.

**Provide a Scheduled Start Date** - Users have the option of adding a Scheduled Start Date to a task. If added, the date and time will be shown to the dispatcher when assigning the task from Task Scheduling. Dispatchers can also change the date from Task Scheduling at any time.

**Add Multiple Time Slots to the Task (Updated V2.7)** - For tasks that span multiple time slots (example: Tasks that take place over the course of a week), use the Add Additional Time Slots functionality to set up the schedule. You can add time slots one by one or add them in bulk for those tasks which have a consistent schedule like "Monday to Friday from 9 am to 5 pm for four weeks."

**Add an Asset to a Task (Updated V2.7)** - Preventive and corrective maintenance usually happens on an installed Asset. Optionally add one or more Assets to a task so technicians know which items to service and to maintain better records on the services provided.

**Send Notes to Dispatcher** - When adding a Task, users can add an optional Note to the task which will be visible by the person dispatching the Task. This is useful for sending specific details or comments about the task, site or customer to aid the dispatcher in performing their duties.

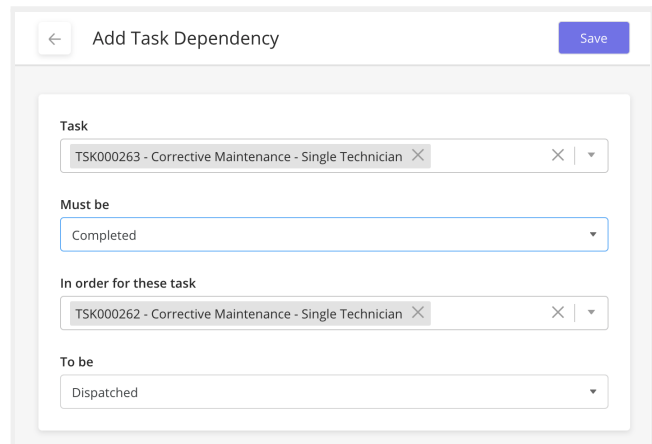
**Assign Services to a Task (Optional)** - Services are first configured for each Task Type in Settings - Work Order Settings - Task Types. When creating a new Task Type, users must select if they want to use Services (Services: Enabled / Disabled) and if Services are Enabled, they must define the list of default Services on the Task Type.

When adding a Task to a Work Order, users will see the pre-defined list of Services if enabled and can select none, one, multiple, or all of the default Services to add to that particular task. Any Services added to the task are then visible to the assigned Technician in their mobile workflow when performing the task, but it is not required that the technician perform all Services which have been added to the task since it acts more like a catalog than a requirement.

## Create Task Dependencies

(New V2.5)

Configure the order in which tasks need to be performed if there are two or more tasks in a work order. Task dependencies are created based on task status changes and any number of dependencies can be configured. Please note that as of today Task dependencies are not being honored by the auto schedulers.



## Task Type Settings

Define Task Types that are used to manage the configuration of a task, including the Mobile Workflow, the results model and results side panel, the default estimated duration, the Skills and Skill Levels required, and the task approval settings. FSE comes with several pre-configured Task Types associated with the Standard Mobile Workflows that come out of the box: Corrective Maintenance, Corrective Task Request, Preventive Maintenance, Simple Installation, and Site Change Request. These task types also come with all of the associated objects required to make them function correctly (i.e. the mobile workflows, results side panels, results models, etc.). For more information on the different Task Types, see the section on Standard Mobile Workflows below.

Master: You are not in any Branch
?
🔔
👤

Work Order Types   Work Order Templates   Task Types   Scheduling Settings

## Task Types

8 Records Add New

Status	Name	Description
Deactivated	Break Concrete	Break Concrete
Active	Corrective Maintenance	Corrective maintenance tasks can be assigned to one technician for a single customer site. Once the task has been submitted for review with photo evidence, it can be approved or rejected with the option to give feedback to the technician.
Active	Corrective Task Request	Corrective task requests can be triggered by Technicians through the Mobile Workflow, at the same Customer Site. Once submitted, these requests need to be reviewed on the Web. If approved, a new Task is created which can be scheduled and dispatched as per normal.
Active	Inspection Task	Inspection equipment based on priority
Deactivated	Preventive Maintenance	Preventive maintenance tasks can be assigned to one technician for a single customer site on a specific date and time. With this workflow, technicians can perform routine checks on assets and report issues requiring corrective maintenance.
Deactivated	Restoration of ground	Backfill ground
Deactivated	Simple Installation	Installation tasks can be assigned to one technician for a single customer site. Once the task has been submitted for review with photo evidence, it can be approved or rejected with the option to give feedback to the technician.
Deactivated	Site Change Request	Site change requests are tasks for web users triggered by technicians in the field. During normal tasks, technicians can flag incorrect locations and submit them for review. Web users will need to approve the request in order to automatically update the Customer Site record in Zinier.

## Manage Task Types

### Define a Task Type as a Web Task (Updated V2.5)

- Define a Task Type as a Web-only task. Web tasks are used for tasks completely entirely from the Web app and do not have a mobile workflow.

**This task can be assigned to (New V2.5)** - Here is where you select the type of assignee. This can be either a Single Technician or a Crew.

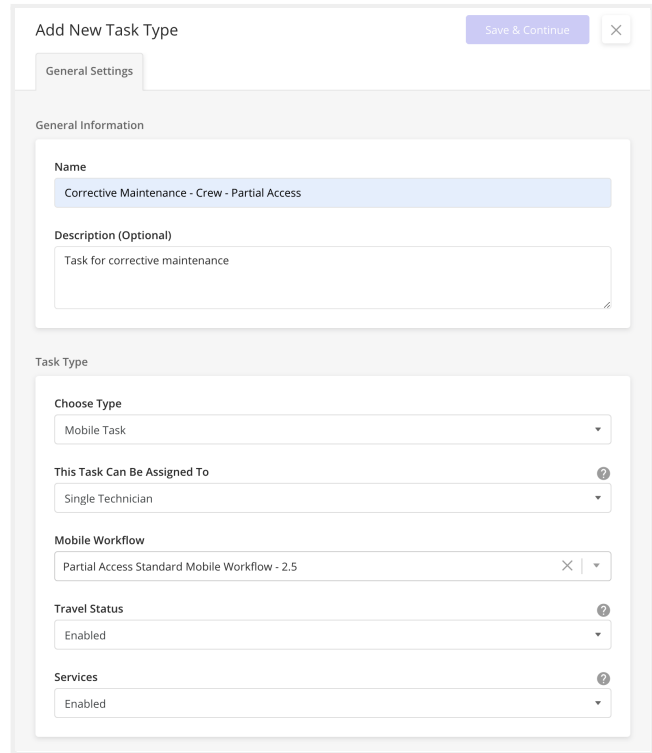
### Define Mobile Workflows for a Task Type -

Define the Mobile Workflow associated with the Task Type. The Mobile Workflow is the workflow sent to a user assigned to the task. When the task is dispatched to the user, the Mobile Workflow appears in the Task List in the Zinier Mobile App. The Mobile Workflow must first be created using Studio Z.

**Enable or Disable Services for a Task Type** - Enable or Disable Services on each task type and if enabled, define the default Services associated with the Task Type. Each pre-configured Task Type comes with a set of predefined Services which are a set of smaller steps for the Technician to follow when performing a task. Services are a set of smaller steps for the Technician to follow when performing a task. Services must first be added from the Catalog / Services module and configured as part of the Mobile Workflow in Studio Z.

### Define the Estimated Duration of a Task Type -

Define the Estimated Duration for the Task Type. The estimated duration is used in Task Scheduling to determine the block of time a task takes to complete. The default value comes from the Task Type but can be overridden when added to a Work Order. It is also seen by technicians when they browse their task list on the mobile app. For example, if a user is assigned a task at 9:00 am and the duration is 60 minutes, the task will then show 9:00 am - 10:00 am in their task list.



### Define the Result Model of a Task Type -

Define which Results Model is used by the Task Type to capture the data collected in the mobile workflow. The Results Model must first be created using Studio Z.

### Define the Results Side panel of a Task Type -

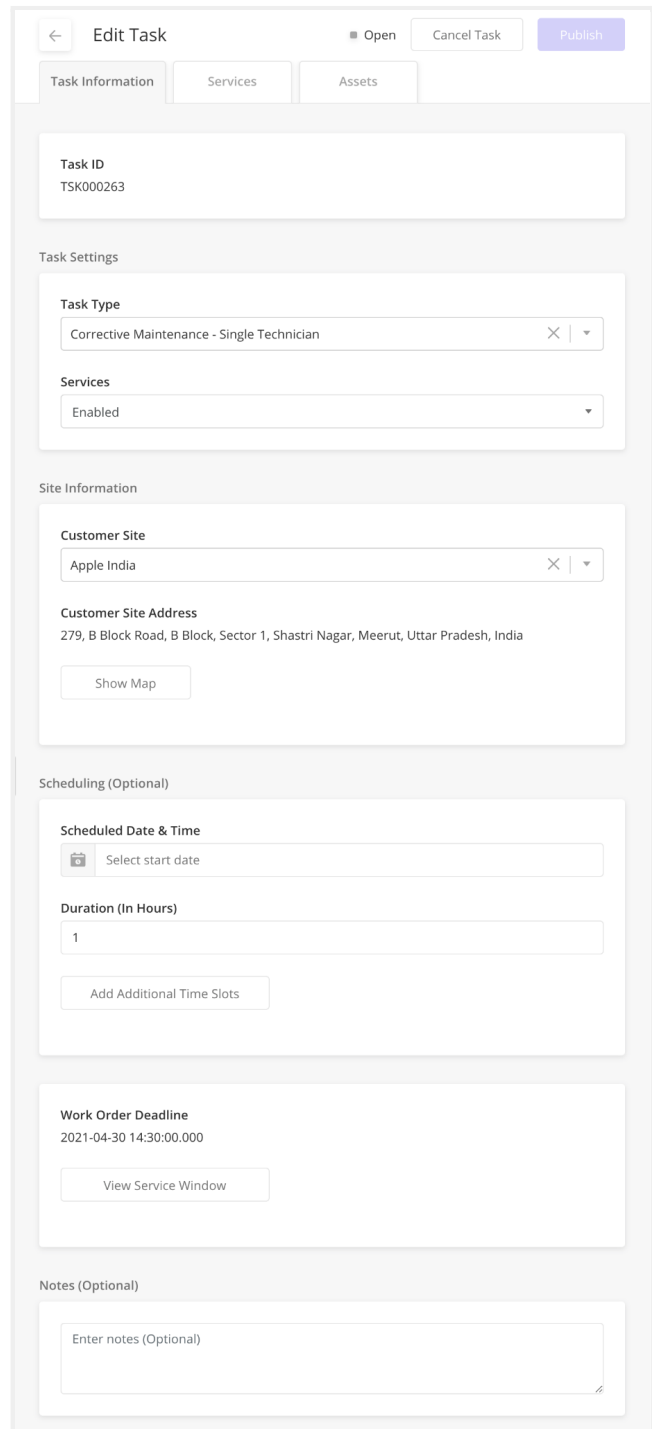
Define which Results Sidepanel the Task Type will display. The Results Sidepanel dictates how the results stored in the Results Model are displayed when a task is submitted for approval and corresponds to the Web Page that was built for that specific Mobile Workflow. The Results Sidepanel page must first be created using Studio Z

### Define the list of Rejection Reasons for a

**Task Type -** Define which dropdown menu options (List Options) to show in the Task Approval side panel when a user rejects a task.

### Define the list of Cancellations Reasons for a

**Task Type -** Define which dropdown menu options (List Options) to show when a dispatcher cancels a from the Task Scheduling module.



**Edit Task** [Open] [Cancel Task] [Publish]

Task Information Services Assets

Task ID  
TSK000263

Task Settings

Task Type  
Corrective Maintenance - Single Technician

Services  
Enabled

Site Information

Customer Site  
Apple India

Customer Site Address  
279, B Block Road, B Block, Sector 1, Shastri Nagar, Meerut, Uttar Pradesh, India  
[Show Map]

Scheduling (Optional)

Scheduled Date & Time  
[Select start date]

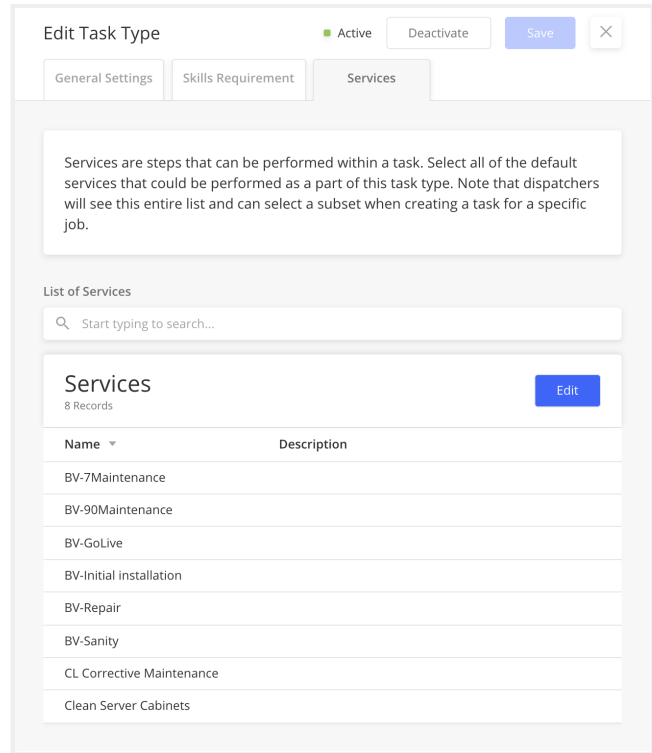
Duration (In Hours)  
1  
[Add Additional Time Slots]

Work Order Deadline  
2021-04-30 14:30:00.000  
[View Service Window]

Notes (Optional)  
[Enter notes (Optional)]

## Define Task Type Services

If Enabled from the previous screen users can define the default Services associated with the Task Type. Each pre-configured Task Type comes with a set of predefined Services which are a set of smaller steps for the Technician to follow when performing a task. Services are a set of smaller steps for the Technician to follow when performing a task. Services must first be added from the Catalog / Services module and configured as part of the Mobile Workflow in Studio Z.



**Edit Task Type** Active Deactivate Save ×

General Settings | Skills Requirement | **Services**

Services are steps that can be performed within a task. Select all of the default services that could be performed as a part of this task type. Note that dispatchers will see this entire list and can select a subset when creating a task for a specific job.

List of Services

Start typing to search...

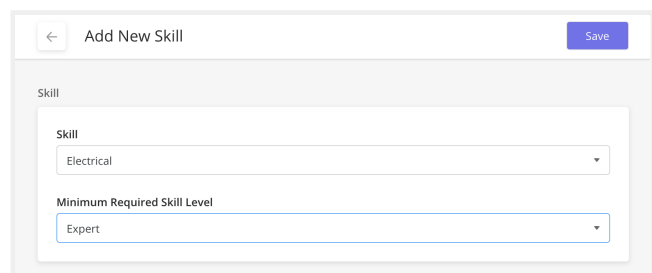
**Services** Edit

8 Records

Name	Description
BV-7Maintenance	
BV-90Maintenance	
BV-GoLive	
BV-Initial installation	
BV-Repair	
BV-Sanity	
CL Corrective Maintenance	
Clean Server Cabinets	

## Define Required Skills and Skill Levels for a Task Type

Define the Skills and Skill Levels requirements of the Task Type. These are then compared to the Skill and Skill Levels of a technician when the Tech Recommendation / Auto Scheduler is run.



← **Add New Skill** Save

Skill

Skill

Electrical

Minimum Required Skill Level

Expert

# Assets & Inventory

Assets and Inventory are managed in several different modules in FSE. The Assets module is used to track your Assets and details such as the serial number, contract, customer and date of purchase of an Asset. Assets are also important inputs in Work Orders where tasks (such as preventive and corrective maintenance tasks) can be performed on and linked to particular Assets.

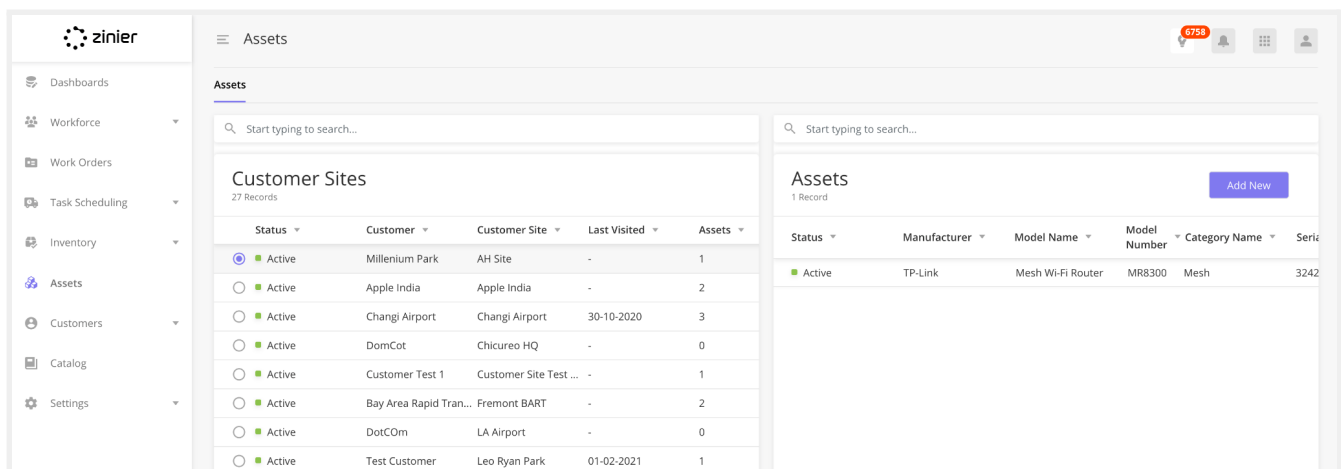
The Inventory module tracks Parts and Materials used in Work Orders and the Stock Location and quantities of inventory at each location.

## Assets (Updated V2.10)

Where Assets are managed in FSE. Assets are tracked at Customer Sites. For more information, see the Customers section below. In order to add an Asset to a Customer Site, the customer site must first exist and the Asset must exist in the Parts & Assets Catalog. For more information, see the Customers section and Catalogs section.

Here the user can:

- Manage (add and edit) individual assets installed at customer sites.
- View Assets at Each Customer Site
- Users can view a list of Assets installed at each Customer Site.



**Customer Sites**  
27 Records

Status	Customer	Customer Site	Last Visited	Assets
Active	Millenium Park	AH Site	-	1
Active	Apple India	Apple India	-	2
Active	Changi Airport	Changi Airport	30-10-2020	3
Active	DomCot	Chicureo HQ	-	0
Active	Customer Test 1	Customer Site Test ...	-	1
Active	Bay Area Rapid Tran...	Fremont BART	-	2
Active	DotCom	LA Airport	-	0
Active	Test Customer	Leo Ryan Park	01-02-2021	1

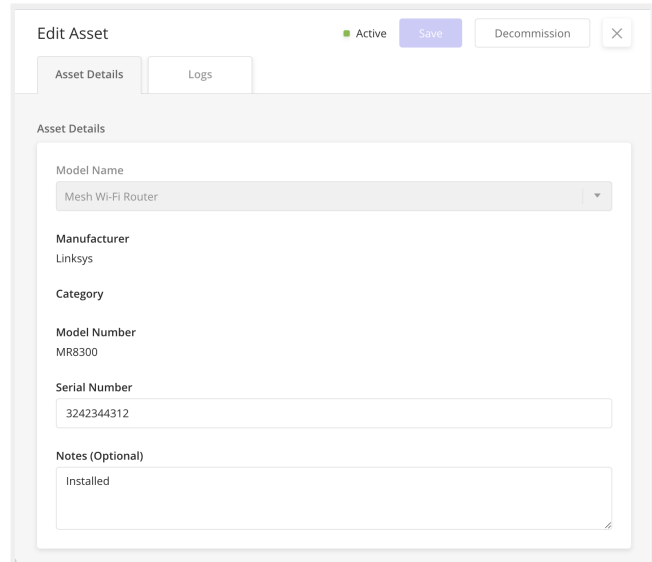
**Assets**  
1 Record

Status	Manufacturer	Model Name	Model Number	Category Name	Serial
Active	TP-Link	Mesh Wi-Fi Router	MR8300	Mesh	3242



## Manage Assets at Customer Sites (Updated V2.10)

Provide Asset Information - Select the asset to install at the Customer Site from the pre-populated list of Assets from the Parts & Assets Catalog. This will pre-populate the Manufacturer and Model Number fields. Users can then add a serial number to an Asset to specify which item was installed at the Customer Site.



**Edit Asset** Active Save Decommission ×

**Asset Details** Logs

**Asset Details**

Model Name  
Mesh Wi-Fi Router

Manufacturer  
Linksys

Category

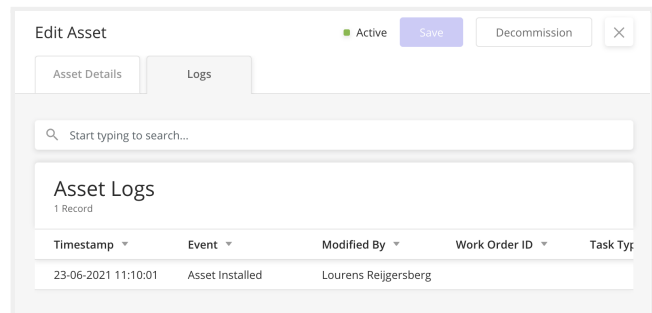
Model Number  
MR8300

Serial Number  
3242344312

Notes (Optional)  
Installed

## Asset Logs (New V2.10)

Logs have been added to each Asset to help web users understand the key actions and changes that have taken place on each item. This enables them to see the whole history and make better decisions about what action needs to be taken.



**Edit Asset** Active Save Decommission ×

**Asset Details** Logs

Start typing to search...

**Asset Logs**  
1 Record

Timestamp	Event	Modified By	Work Order ID	Task Typ
23-06-2021 11:10:01	Asset Installed	Lourens Reijgersberg		

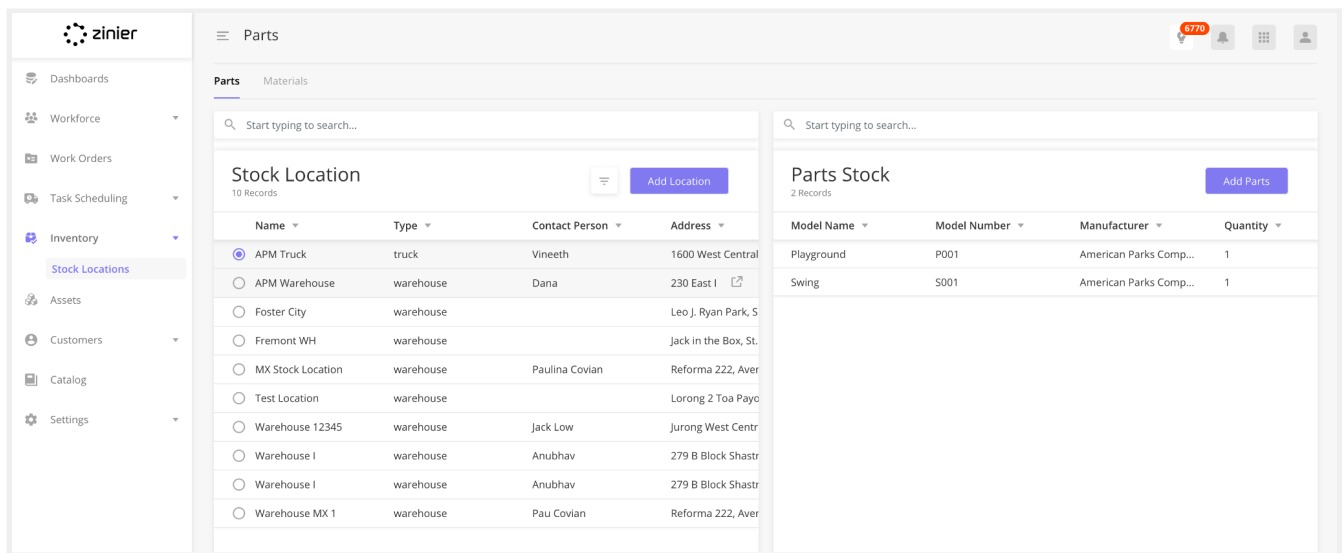
The Logs capture the following events:

- Asset Installed
- Service Requested
- Task Completed
- Asset Decommissioned / Reactivated

# Stock Locations

Stock Locations which are the locations where Parts and Materials are stored. Adding and transferring Parts and Materials from one location to the other can be done from here. Stock Locations must first be added before the inventory can be added.

Users can view, add or edit the Parts and Material inventory at each location.



The screenshot displays the Zinier web application interface. On the left is a navigation sidebar with options like Dashboards, Workforce, Work Orders, Task Scheduling, Inventory (selected), Assets, Customers, Catalog, and Settings. The main content area is titled 'Parts' and contains two panels:

- Stock Location**: A table with 10 records. The first record, 'APM Truck', is selected. The table columns are Name, Type, Contact Person, and Address.
- Parts Stock**: A table with 2 records. The first record is 'Playground'. The table columns are Model Name, Model Number, Manufacturer, and Quantity.

Name	Type	Contact Person	Address
<input checked="" type="radio"/> APM Truck	truck	Vineeth	1600 West Central
<input type="radio"/> APM Warehouse	warehouse	Dana	230 East I
<input type="radio"/> Foster City	warehouse		Leo J. Ryan Park, S
<input type="radio"/> Fremont WH	warehouse		Jack in the Box, St.
<input type="radio"/> MX Stock Location	warehouse	Paulina Covian	Reforma 222, Aver
<input type="radio"/> Test Location	warehouse		Lorong 2 Toa Payo
<input type="radio"/> Warehouse 12345	warehouse	Jack Low	Jurong West Centr
<input type="radio"/> Warehouse I	warehouse	Anubhav	279 B Block Shastr
<input type="radio"/> Warehouse I	warehouse	Anubhav	279 B Block Shastr
<input type="radio"/> Warehouse MX 1	warehouse	Pau Covian	Reforma 222, Aver

Model Name	Model Number	Manufacturer	Quantity
Playground	P001	American Parks Comp...	1
Swing	5001	American Parks Comp...	1

## Manage Stock Locations

There are two types of stock locations:

**Warehouse Locations** - Manage (add and edit) the stock locations where Parts and Materials are stored. Provide the contact information and address of the warehouse, which can be used if a tech needs to collect parts or materials as part of a task.

**Trucks as Stock Locations** - Users can add to a truck which can then be assigned to an individual technician. Truck locations must be assigned to a technician and take the tech's Home Base address as the address of the truck location.

Edit Stock Location
Save ✕

**General Information**

**Stock Location Name**

**Description (Optional)**

**Type**

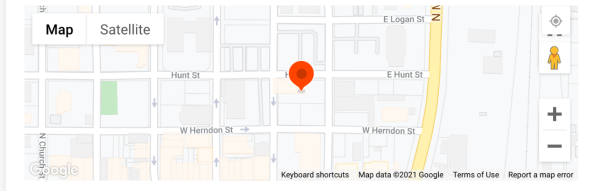
**Stock Location Details**

**Contact Person Name (Optional)**

**Contact Person Title (Optional)**

**Contact Phone (Optional)**

**Warehouse Address**

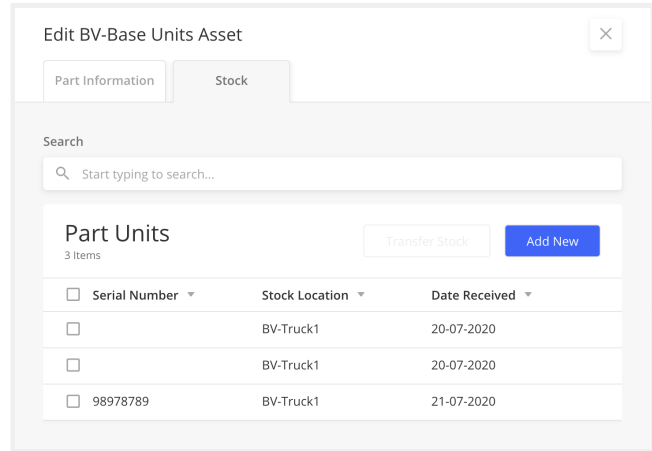


## Parts & Material Inventory

In order to add a Part or Material to a stock location, the item must first be added to the catalog which contains information about the item's cost, manufacturer, stock unit type, etc. This is managed from Billing / Catalogs / Parts and Assets or Materials. For more information, see the Billing / Catalogs section below.

## Managing Inventory

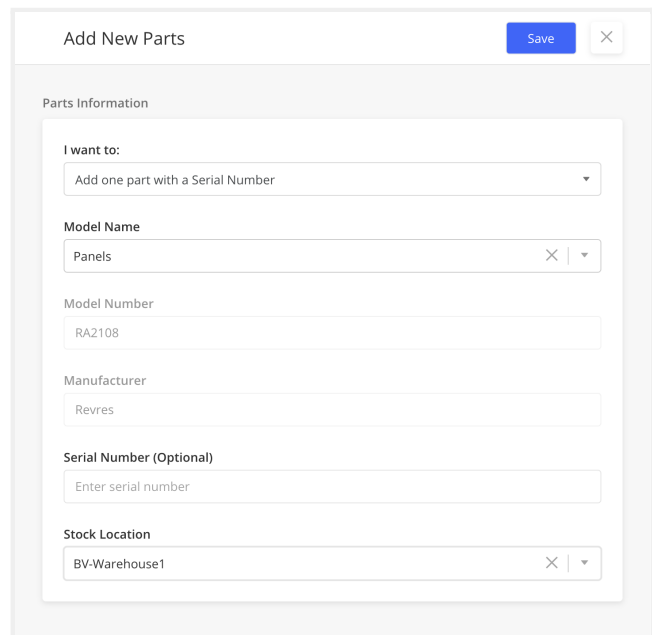
Manage (add, edit and transfer) Parts and Material at each stock location. When adding Parts, users have the option of either adding parts at the unit level (with individual serial numbers) or adding parts in bulk (without serial numbers).



The screenshot shows the 'Edit BV-Base Units Asset' window with two tabs: 'Part Information' and 'Stock'. The 'Stock' tab is active, displaying a search bar and a table of 'Part Units' (3 items). The table has columns for 'Serial Number', 'Stock Location', and 'Date Received'. There are 'Transfer Stock' and 'Add New' buttons.

Serial Number	Stock Location	Date Received
<input type="checkbox"/>	BV-Truck1	20-07-2020
<input type="checkbox"/>	BV-Truck1	20-07-2020
<input type="checkbox"/> 98978789	BV-Truck1	21-07-2020

**Add Parts at the Unit Level** (With Serial Numbers) - Users can add Parts at the unit level when they want to track the location of individual parts.

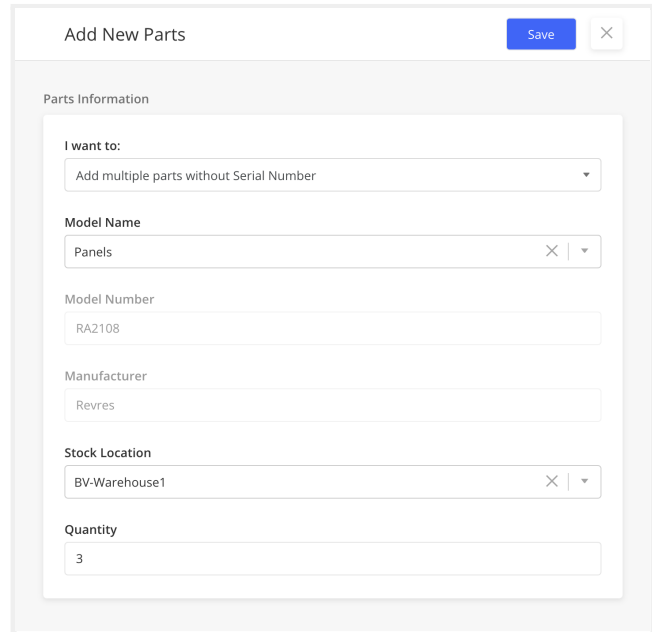


The screenshot shows the 'Add New Parts' window with a 'Save' button and a close button. The 'Parts Information' section contains the following fields:

- I want to:** Add one part with a Serial Number
- Model Name:** Panels
- Model Number:** RA2108
- Manufacturer:** Revres
- Serial Number (Optional):** Enter serial number
- Stock Location:** BV-Warehouse1

**Add Multiple Parts** (Without Serial Numbers) -

Users can add Parts in bulk is useful when it is not necessary to track the individual units.



**Add New Parts** [Save] [X]

Parts Information

I want to:  
Add multiple parts without Serial Number

Model Name  
Panels

Model Number  
RA2108

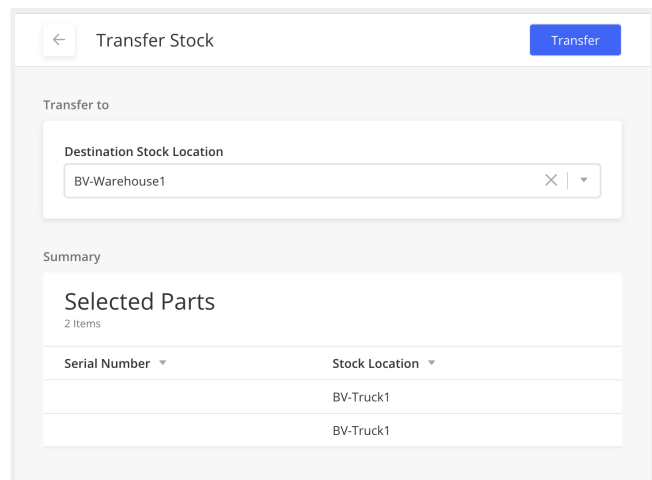
Manufacturer  
Revres

Stock Location  
BV-Warehouse1

Quantity  
3

**Transferring Inventory** - Users can also transfer

parts and materials from one Stock Location to another. For example, if a tech is assigned to a Truck, the tech can pick up stock from a warehouse and transfer it to the truck for use during an Installation task.



< Transfer Stock [Transfer]

Transfer to

Destination Stock Location  
BV-Warehouse1

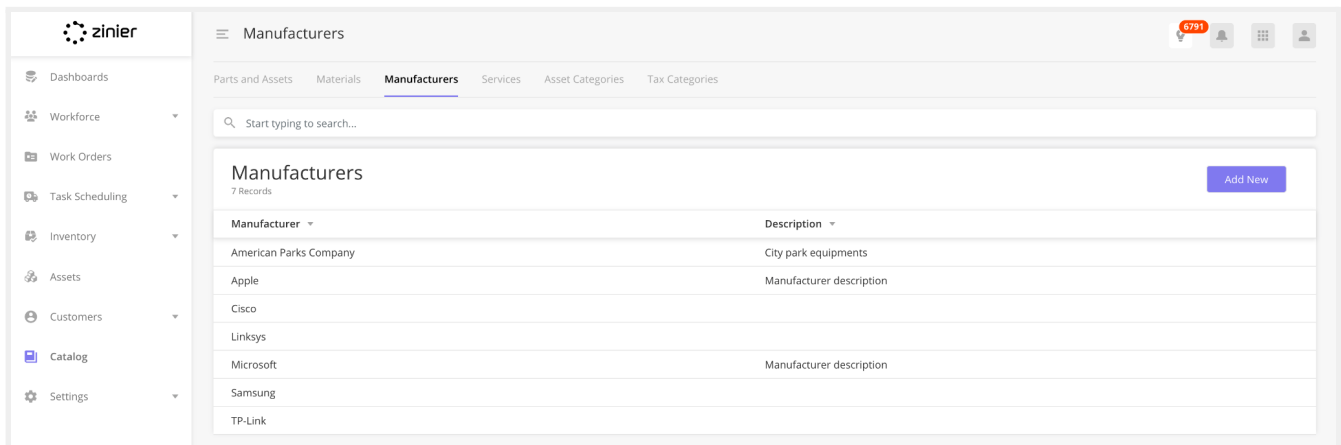
Summary

**Selected Parts**  
2 Items

Serial Number	Stock Location
	BV-Truck1
	BV-Truck1

# Catalogs & Services

Manage (add and edit) your catalog of Parts, Assets, and Materials. A record must be added here before the item can be added as inventory at a Stock Location or as an Asset at a Customer Site. These records contain information about the item's cost, manufacturer, stock unit type, etc.



The screenshot shows the 'Manufacturers' page in the Zinier application. The page has a sidebar on the left with navigation options: Dashboards, Workforce, Work Orders, Task Scheduling, Inventory, Assets, Customers, Catalog, and Settings. The main content area is titled 'Manufacturers' and includes a search bar with the placeholder text 'Start typing to search...'. Below the search bar, there is a table with 7 records. The table has two columns: 'Manufacturer' and 'Description'. The records listed are:

Manufacturer	Description
American Parks Company	City park equipments
Apple	Manufacturer description
Cisco	
Linksys	
Microsoft	Manufacturer description
Samsung	
TP-Link	

An 'Add New' button is located in the top right corner of the table area. The page also shows a notification badge with the number '5791' in the top right corner.

## Parts, Assets & Materials

### Catalogs

Manage (add and edit) your catalog of Parts, Assets, and Materials. These records contain information about the item's cost, manufacturer, stock unit type, etc.

**Parts/Assets vs Materials** - Materials records differ from Parts and Assets in that the Model Number and Manufacturer are often not used and are thus optional fields. Additionally, Materials records do not contain a serial number when added as Inventory.

**Model Number** - Add a Model Number to a Part or Asset. Optionally add it to a Material.

Edit Catalog Item
Save
✕

---

**General Information**

**Model Name**  
Mesh Wi-Fi Router

**Description (Optional)**  
Enter description

**Model Number**  
MR8300

**Manufacturer**  
TP-Link ✕ | ▾

**Category (Optional)**  
Mesh ✕ | ▾

**Stock Unit**  
Units ▾

---

**Accounting (Optional)**

**Cost**  
\$ 30

**List Price**  
\$ 80

**Tax Category**  
Select tax category ▾

**Tax Rate (%)**  
0

---

**Part Manual (Optional)**

**Upload File**

Drag & Drop or browse your file

Supported files: .pdf  
Max file is 1.00 MB

**Select the Manufacturer** - Define the Manufacturer. This is optional for Material records.

In order to assign a Manufacturer, it must first be created from the Catalog - Manufacturers module. For more information, see the Manufacturers section below.

**Select a Category (New V2.10)** - Optionally select the category in order to better group Parts and Assets.

**Select a Stock Unit type** - Define the unit of measurement used for the item.

In order to assign a Stock Unit, it must first be created from the Settings - Business Settings - Stock Units module.

### Optionally Select a Default Tax Rates

Define the Tax Rates to assist when billing and invoicing customers or connecting to external ERP systems.

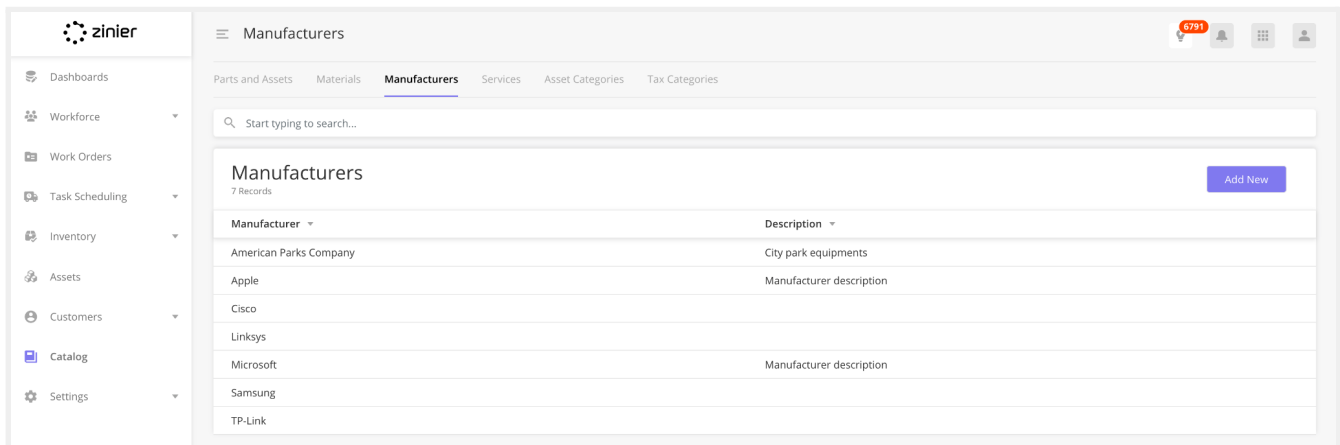
In order to assign a Tax Rate, it must first be created from the Tax Categories module. For more information, see the Tax Categories section below.

### Optionally Set Default Prices

Give the item a default Purchase Price and default Price Charged to the Customer to assist when billing and invoicing customers or connecting to external ERP systems.

## Manufacturers Catalog

Define (add and edit) a master list of Manufacturers. A record must be added here before the item can be assigned to a Part, Asset or Material.



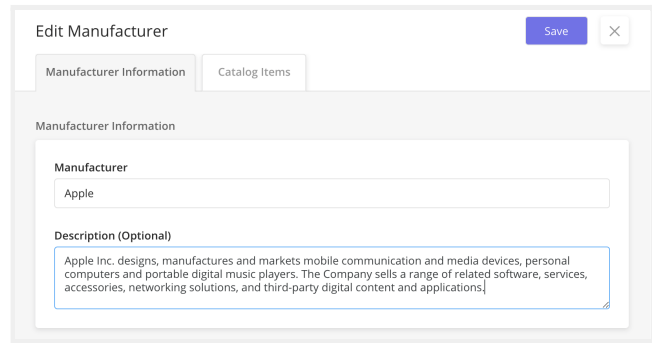
Manufacturer	Description
American Parks Company	City park equipments
Apple	Manufacturer description
Cisco	
Linksys	
Microsoft	Manufacturer description
Samsung	
TP-Link	



## Manage Manufacturers Catalog

Define (add and edit) a master list of Manufacturers. A record must be added here before the item can be assigned to a Part, Asset, or Material.

You can view a list of all the Parts & Assets associated with each Manufacturer in the Catalog Items tab.



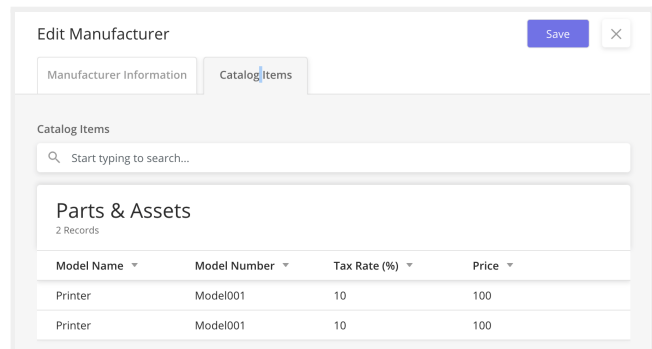
**Edit Manufacturer** [Save] [X]

Manufacturer Information | Catalog Items

**Manufacturer Information**

**Manufacturer**  
Apple

**Description (Optional)**  
Apple Inc. designs, manufactures and markets mobile communication and media devices, personal computers and portable digital music players. The Company sells a range of related software, services, accessories, networking solutions, and third-party digital content and applications.



**Edit Manufacturer** [Save] [X]

Manufacturer Information | Catalog Items

**Catalog Items**

Start typing to search...

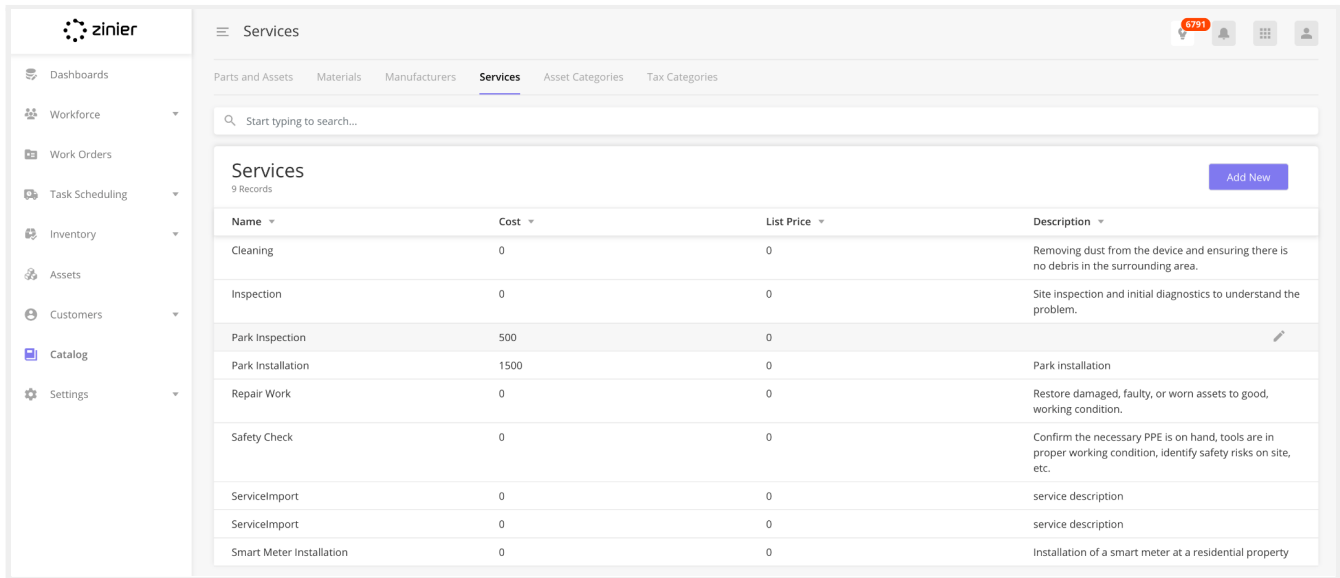
**Parts & Assets**  
2 Records

Model Name	Model Number	Tax Rate (%)	Price
Printer	Model001	10	100
Printer	Model001	10	100

---

## Service Catalog

Define (add and edit) a master list of Services. Services represent a set of smaller steps for the Technician to follow when performing a task and can be given a monetary value for accounting purposes. Adding the record here allows you to tie a dollar value and tax rate to the Service. Once added, the Service can then be added to a Task Type for use in Work Orders.



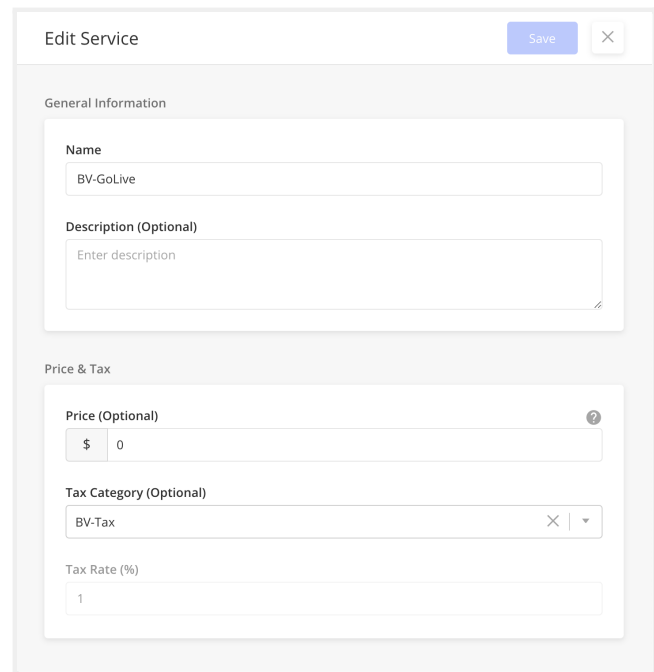
Name	Cost	List Price	Description
Cleaning	0	0	Removing dust from the device and ensuring there is no debris in the surrounding area.
Inspection	0	0	Site inspection and initial diagnostics to understand the problem.
Park Inspection	500	0	
Park Installation	1500	0	Park installation
Repair Work	0	0	Restore damaged, faulty, or worn assets to good, working condition.
Safety Check	0	0	Confirm the necessary PPE is on hand, tools are in proper working condition, identify safety risks on site, etc.
ServiceImport	0	0	service description
ServiceImport	0	0	service description
Smart Meter Installation	0	0	Installation of a smart meter at a residential property

## Manage Services

Add the service name and optionally the description. The name and the description can also help the technician in the field to get a better understanding of the service.

**Optionally Define Default Tax Rates** - Define the Tax Rates to assist when billing and invoicing customers or connecting to external ERP systems.

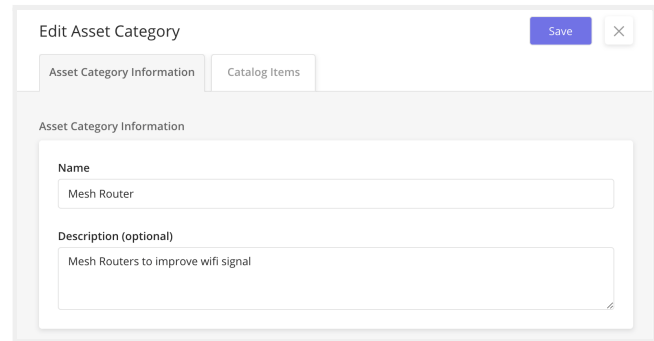
In order to assign a Tax Rate, it must first be created from the Tax Categories module. For more information, see the Tax Categories section below.



**Optionally Set a Default Price** - Give the item a default Price to assist when billing and invoicing customers or connecting to external ERP systems.

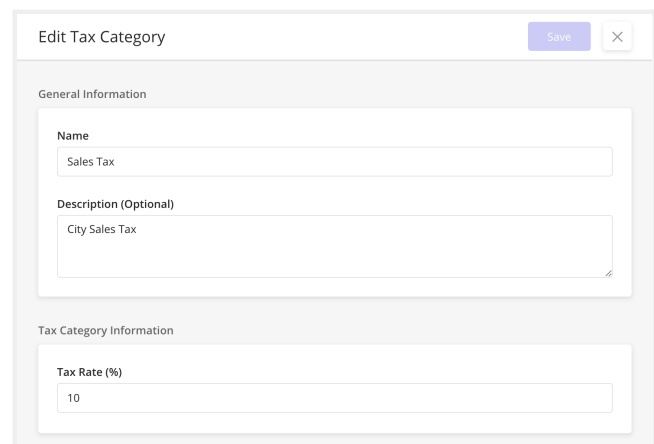
## Asset Categories

Create a catalog of categories to better group Parts and Assets. Define the categories here and then they can be optionally added to each item in the Parts and Assets catalog, and are viewable on the individual assets themselves.



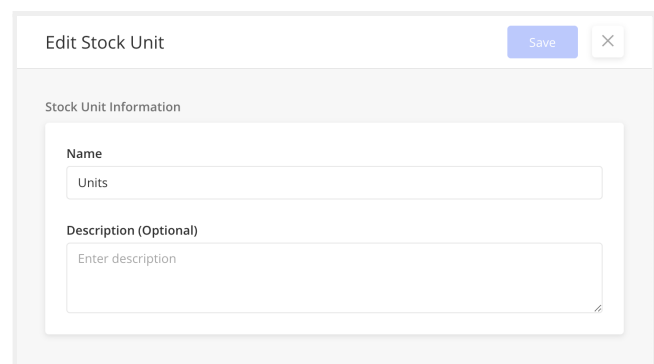
## Tax Categories

Manage (add and edit) your catalog of Tax Categories. A record must be added here before the item can be assigned to a Part, Asset, Material, or Service. Tax Categories allow you to define specific Tax Rates for items in your catalog to assist when billing and invoicing customers or connecting to external ERP systems.



## Stock Units

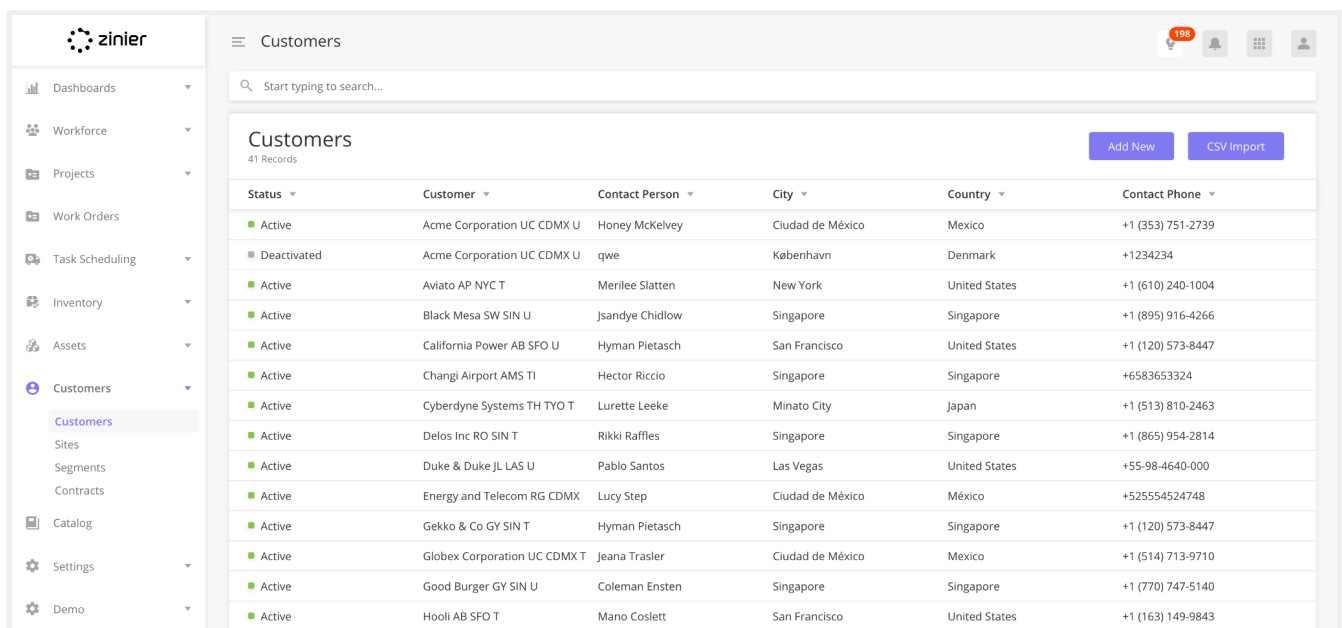
Define (add and edit) a master list of Stock Units. A record must be added here before the item can be assigned to a Part, Asset, or Material.



# Customer Management

## Customers

Customers are used in a number of places across the platform. All Work Orders, Assets, and Contracts are associated with customers. Customers also have Customer Sites that serve as the location for an Asset associated with that customer or the location where Tasks are performed in the field.



Status	Customer	Contact Person	City	Country	Contact Phone
Active	Acme Corporation UC CDMX U	Honey McKelvey	Ciudad de México	Mexico	+1 (353) 751-2739
Deactivated	Acme Corporation UC CDMX U	qwe	København	Denmark	+1234234
Active	Aviato AP NYC T	Merilee Slatten	New York	United States	+1 (610) 240-1004
Active	Black Mesa SW SIN U	Jsandye Chidlow	Singapore	Singapore	+1 (895) 916-4266
Active	California Power AB SFO U	Hyman Pietasch	San Francisco	United States	+1 (120) 573-8447
Active	Changi Airport AMS TI	Hector Riccio	Singapore	Singapore	+6583653324
Active	Cyberdyne Systems TH TYO T	Lurette Leeke	Minato City	Japan	+1 (513) 810-2463
Active	Delos Inc RO SIN T	Rikki Raffles	Singapore	Singapore	+1 (865) 954-2814
Active	Duke & Duke J LAS U	Pablo Santos	Las Vegas	United States	+55-98-4640-000
Active	Energy and Telecom RG CDMX	Lucy Step	Ciudad de México	México	+525554524748
Active	Gekko & Co GY SIN T	Hyman Pietasch	Singapore	Singapore	+1 (120) 573-8447
Active	Globex Corporation UC CDMX T	Jeana Trasler	Ciudad de México	Mexico	+1 (514) 713-9710
Active	Good Burger GY SIN U	Coleman Ensten	Singapore	Singapore	+1 (770) 747-5140
Active	Hooli AB SFO T	Mano Coslett	San Francisco	United States	+1 (163) 149-9843

## Manage Customers

Manage (add, edit and deactivate) customers and their contact details.

When clicking on the Customer Sites App, you can view a list of all the Customer Sites associated with the Customer.

Edit Customer

■ Active
 Deactivate
Save
✕

Customer Information

Customer Sites

**General Information**

**Customer**

**Description (Optional)**

**Location Information**

**Address**

**City**

**State**

**Postal Code**

**Country**

**Contact Information**

**Contact Person Name**

**Contact Person Title (Optional)**

**Contact Phone**

**Contact Email (Optional)**

## Customer Sites

Manage (add, edit and deactivate) Customer Sites which include contact details and the site location. A Customer Site is a location where the tasks in the Work Orders are performed.

Customer Sites

Accuweather Map
Openweather Map

198
🔔
👤

### Customer Sites

59 Records

Add New
CSV Import

Status	Site	Customer	City	Region	Country
Active	Avamm East UC CDMX U	Acme Corporation UC CDMX U	Ciudad de México	Mexico City (UC CDMX)	Mexico
Active	Avamm West UC CDMX T	Globex Corporation UC CDMX T	Ciudad de México	Mexico City (UC CDMX)	Mexico
Active	Babbleset East MS CDMX U	Umbrella MS CDMX U	Ciudad de México	Mexico City (MS CDMX)	Mexico
Active	Babbleset West MS CDMX T	Initech MS CDMX T	Ciudad de México	Mexico City (MS CDMX)	Mexico
Active	Blogtag East East AB SFO T	Hooli AB SFO T	San Francisco	San Fransisco (AB SFO)	United States
Active	Blogtag West AB SFO U	California Power AB SFO U	San Francisco	San Fransisco (AB SFO)	United States
Active	Bubblebox East KV MEL T	Massive Dynamic KV MEL T	Parkville	Melbourne (KV MEL)	Australia
Active	Bubblebox West KV MEL U	Vehement Capital Partners KV MEL U	Melbourne	Melbourne (KV MEL)	Australia
Active	Corrandan West SW SIN U	Black Mesa SW SIN U	Singapore	Singapore (SW SIN)	Singapore
Active	Cosmopolita	Energy and Telecom RG CDMX			
Active	Creek LR AMS T	Tech Amsterdam LR AMS T	Singapore	Amsterdam (LR AMS)	Singapore
Active	Customer Premise 1 NR YTO U	NY Inquirer NR YTO U	Halton Hills	Toronto (NR YTO)	Canada

## Manage Customer Sites

### Provide Latitude / Longitude via Google Maps

**API** - Add the address of a Customer Site using Google Maps. Google Maps will provide the Lat / Long of the site address based on the input in the Address field. But you also have the option of providing your own specific Lat / Long -- especially useful if the address is not well documented by Google Maps. The Lat / Long is important as it is used as the check-in location when a tech is assigned to a task at the site.

**Assign Regions / Sub-regions** - Assign regions and sub-regions to a Customer Site. Regions are (optionally) used as part of the matching criteria when assigning a tech to a task at the site. If the tech is associated with a Contractor with the same region as the customer site, the tech can be assigned to tasks performed at the site.

Regions must first be added in Settings / Business Settings. Once added, a Region can be assigned to the Customer Site.

Edit Customer Site
Active Deactivate Save X

**General Information**

Site Name  
AH Site

Description (Optional)  
Enter description

**Customer**

Millenium Park

**Contact Information (Optional)**


Contact Person Name  
John

Contact Person Title  
Doe

Contact Phone  
+1 (444) 555-6677

Contact Email  
Enter email

**Site Location**



Address  
1700 East Rand Road, Arlington Heights, IL, USA

City  
Arlington Heights

State (Optional)  
Illinois

Postal Code  
60004

Country  
United States

Region  
North

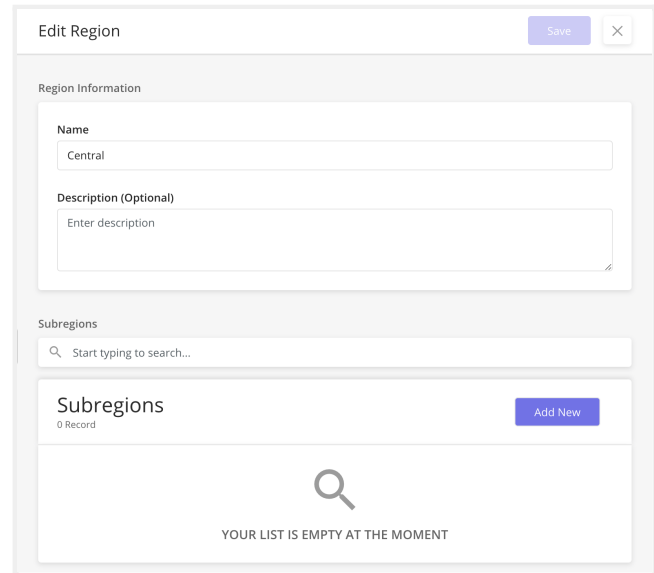
Subregion (Optional)  
Select subregion

Latitude  
42.1020188

Longitude  
-87.9618124

## Manage Regions / Sub-regions

Define (add and edit) a master list of Regions / Sub-regions. Regions are (optionally) used as part of the matching criteria when assigning a Technician to a Task at a Customer Site. When the Tech Recommendation attempts to match a Technician with a Task, it will check to see if the Region of the Customer Site matches the Region(s) of the Contractor(s) the Technician is associated with. If the Technician is associated with a Contractor with the same Region as the Customer Site, the Technician can be assigned to Tasks performed at the Customer Site. Once added, a Region can be assigned to a Contractor and Customer Sites.



The screenshot shows the 'Edit Region' form. At the top right, there is a 'Save' button and a close icon. The form is divided into two main sections: 'Region Information' and 'Subregions'.  
The 'Region Information' section contains two input fields: 'Name' with the value 'Central' and 'Description (Optional)' with the placeholder text 'Enter description'.  
The 'Subregions' section features a search bar with the placeholder text 'Start typing to search...'. Below the search bar, it displays 'Subregions' with '0 Record' and an 'Add New' button. A large magnifying glass icon is centered below the search bar, and the text 'YOUR LIST IS EMPTY AT THE MOMENT' is displayed at the bottom of the section.



## Manage Contracts

Define (add and edit) a master list of Contracts to associate with Customers.

**Assign a Customer** - Assign a Customer to a Contract.

Customers must first be added from the Customers module. Once added, a Customer can then be assigned to a Contract.

**Assign SLAs** - Define the SLA associated with the Contract. The SLA is used to pre-populate the Resolution Time and Default Deadline for Work Orders assigned to the Customer in the Work Order.

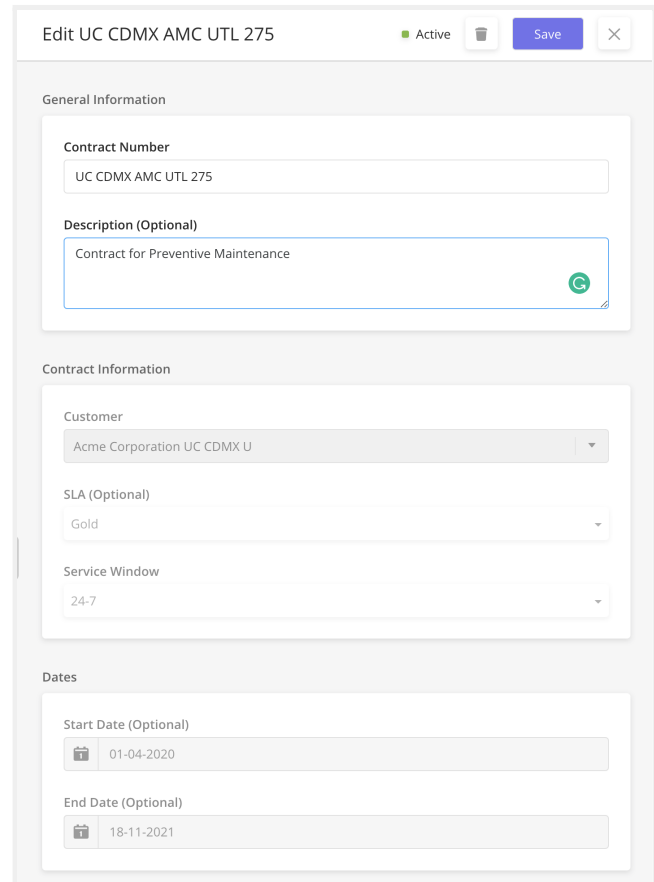
SLAs must first be added in Settings / Business Settings. Once added, an SLA can be assigned to a Contract.

**Assign Service Windows** - Define hours of operation and public holidays associated with a Contract to support accurate task scheduling. Service Windows determine when a task can be performed at a Customer Site (the hours of operation).

Service Windows must first be added in Settings / Business Settings. Once added, a Service Window can be assigned to a Contract which can then be tied to a Work Order.

**View Contract Status** - The status of a contract is determined by comparing the current date to the Start and End Date of the Contract:

- Active: If the End Date of the Contract is in the future
- Expired: If the End Date of the Contract is in the past



Edit UC CDMX AMC UTL 275 Active Save ×

**General Information**

**Contract Number**  
UC CDMX AMC UTL 275

**Description (Optional)**  
Contract for Preventive Maintenance

**Contract Information**

**Customer**  
Acme Corporation UC CDMX U

**SLA (Optional)**  
Gold

**Service Window**  
24-7

**Dates**

**Start Date (Optional)**  
01-04-2020

**End Date (Optional)**  
18-11-2021

## Manage SLAs

SLAs must first be added in Settings - Business Settings. Once added, an SLA can be assigned to a Contract which then ties it to the Work Order.

Define (add and edit) a master list of SLAs. Configure different SLA Resolution Times for each Work Order Priority (Low, Medium, High, etc.) to enforce specific contract terms and assist with scheduling and dispatch. SLAs are tied to Work Orders by Customer Contracts. SLA Resolution Time and Default Deadline are pre-populated based on the Contract assigned to the Work Order.

SLAs use the concept of Priority Time Frames which tie a particular SLA Resolution Time to the particular Priority you set when creating a Work Order. When you select a Priority for the Work Order, it will take the SLA Resolution Time and use that to calculate the default Deadline for the Work Order and Tasks added to the Work Order.

Edit SLA
Save ✕

**General Information**

**Name**

Gold

**Description (Optional)**

Enter description

**SLA Time Frames**

Start typing to search...

**SLA Time Frames**

2 Records

Add New

Priority	Resolution Time	Edit
High	3d	<span style="font-size: 0.8em;">✎</span>
Medium	5d	

## Manage Service Windows

Service Windows determine the hours of operation when a task can be performed at a Customer Site associated with the Work Order. When adding Tasks to a Work Order, it must be assigned a Customer Site, which is the location at which the task must be performed.

The Service Window is pre-populated based on the Contract assigned to the Work Order. Service Windows must first be added in Settings / Business Settings. Once added, a Service Window can be assigned to a Contract which then ties it to the Work Order.

**Set a Default Service Window** - Set the default Service Windows used by the organization. The default value will then be used when creating Contracts.

Edit Service Window
Save ✕

**General Information**

**Name**

**Description (Optional)**

**Weekly Schedule**

7 Records


Day	Status	Opening Time	Closing Time	Hours
Sunday	Closed	-	-	-
Monday	Open	09:00:00	05:00:00	8h
Tuesday	Open	09:00:00	05:00:00	8h
Wednesday	Open	09:00:00	05:00:00	8h
Thursday	Open	09:00:00	05:00:00	8h
Friday	Open	09:00:00	05:00:00	8h
Saturday	Closed	-	-	-

**Public Holidays**

**Public Holidays**

0 Record


Add New



YOUR LIST IS EMPTY AT THE MOMENT

## Manage Public Holidays

Define (add and edit) a master list of Public Holidays for the Org. Once added, a Public Holiday can be applied to Service Windows (and Technician Calendars) to restrict tasks from being performed at the site on the given holidays.

Public Holidays7690🔔☰👤

List Options List Option Categories Service Windows **Public Holidays**

### Public Holidays

3 RecordsAdd New

Holiday Name	Date	
Christmas Day	25-12-2020	✎
New Years Day	01-01-2021	
Memorial Day	26-04-2021	

## Reporting & Dashboards

Zinier's Reporting and Dashboards relate to the data visualization and metrics most important to customers. We've broken down this section into two distinct sub-categories. Zinier Dashboards utilize the core Zinier dashboard widgets available in the platform. Advanced Dashboard features include more advanced users such as integrations with 3rd party providers like DOMO.

---

### Zinier Dashboards

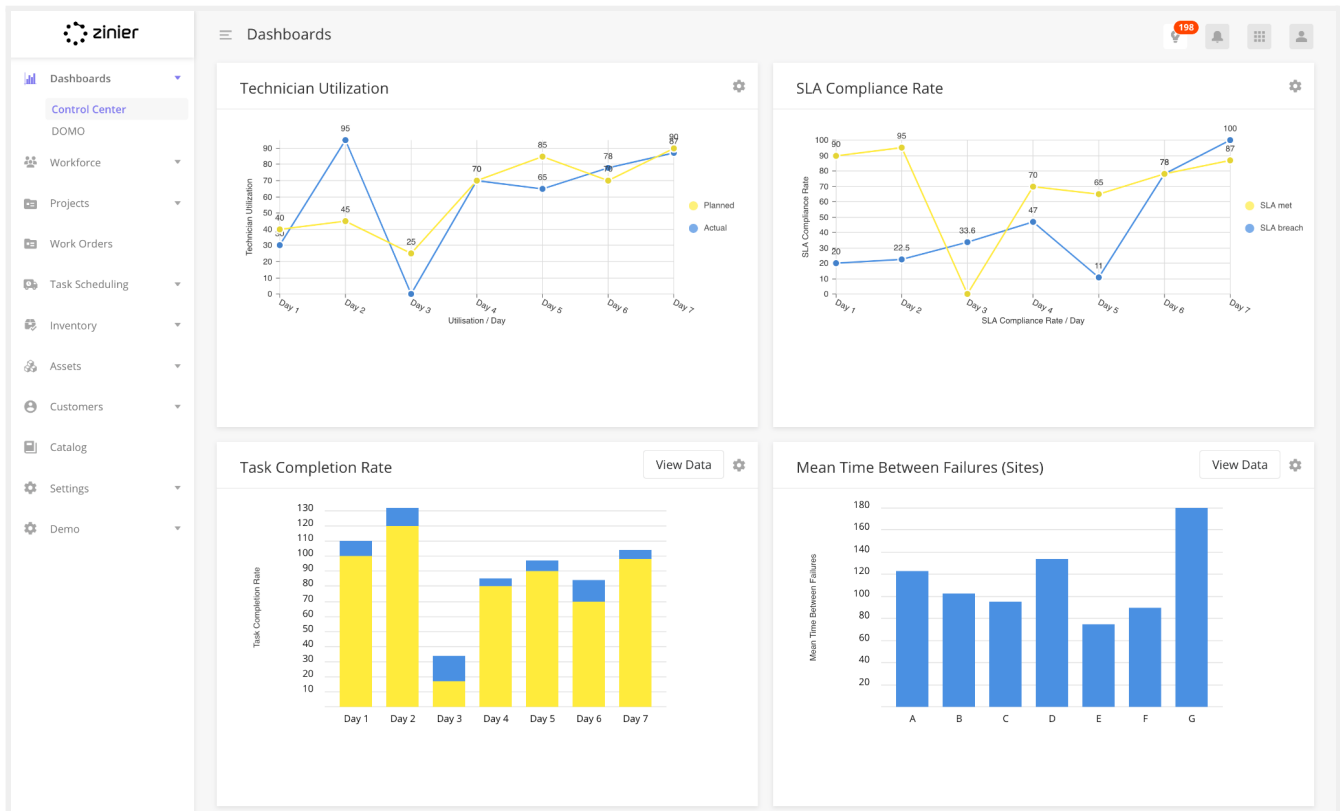
This section highlights the core capabilities of the 13 charts that can be configured in Studio Z and added to any client solution. These 13 chart types can be used to visualize data in real-time. In conjunction with a Multi-Column Layout, it's possible to create useful visualizations of the underlying data to provide meaningful and insightful feedback. The charts can be developed quickly in Studio Z and be connected to our DB to show data in real-time as part of any implementation.

---

### Standard Dashboard Capabilities

**Filter Data** - Filters can be configured for each dashboard widget and are accessible from a dropdown menu on the widget.

**Export Data** - Dashboard widgets can be configured to export the underlying data in CSV format. The export functionality is accessible from a dropdown menu on the widget.



## Standard Chart Types (Widgets)

A number of out of the box dashboards are included as part of Field Service Elements Studio Z can be used to create your own dashboards to meet business requirements.

Widget	Description
Data Grid	Displays Data in a tabular form.
Calendar Widget	Displays data in a calendar
Map Widget	Visualize data in a geographical map
Line Chart	Line chart supports multi-series data.
Bar Chart	Bar Chart that supports multi-series bar charts as well as horizontal and vertical bar chart configuration.
Pie Chart	Display data in % form in a circle.

Bubble Chart	Bubble Chart is a variation of a Scatter Chart that allows you to visualize data in 3 dimensions.
Radar Chart	Radar allows a user to compare multi-series data in multiple dimensions.
Stream Chart	Stream chart displays a stacked area graph for multi-series data over a period of time.
Heat Map Chart	Heat map matrix displays data in the graded color density.
Sunburst Chart	A Sunburst displays hierarchical data, where a level in the hierarchy is represented by a circle.
Scatter Plot Chart	A scatter plot is a type of plot using Cartesian coordinates to display values for typically two variables for a set of data.
Pareto Chart	A Pareto chart is a type of chart that contains both bars and a line graph, where individual values are represented in descending order by bars, and the cumulative total is represented by the line.

---

## Advanced Dashboards

Some of our clients require advanced BI capabilities to be able to analyze the data that come from the Zinier platform to use it internally for reporting. This section highlights the capabilities of integrating with an advanced BI tool called Domo.

- **Domo Integration** - DOMO is a cloud-based BI solution that provides extensive capabilities to connect, store, manipulate and visualize data.
- **Data Preparation** - Clean, transform, and combine data for better visualization using tools that don't require extensive knowledge of SQL or ETL.
- **Data Visualization**
  - Visualize data in graphs, charts, and other visualization options via a drag-and-drop interface.
  - Create customized dashboards and collections to organize, analyze, and report on your business data.
  - Organize the data with advanced data permission by role, department, or even KPIs.

### Data Sharing

- Schedule reports to individuals or groups at specific dates and times.

- Embed single cards or entire dashboards in the Zinier app to mix visual cues with transactional data.

🗨️ 💡 🔔 ☰ 👤

☰

Domo Dashboard Integration

### Scheduling Overview

Technicians Scheduled Hours and Travel Time

🔍 FILTERS (DEFAULT) +
status in Click-to-filter
type in Click-to-filter

**Task Requested Date**  
by Day

JUNE 2021						
	1	2	3	4	5	
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30			

**Task Scheduled Date**  
by Day

JUNE 2021						
S	M	T	W	T	F	S
30	31	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	1	2	3

**Work Date**  
by Day

JUNE 2021						
S	M	T	W	T	F	S
30	31	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	1	2	3

**Task Types**

Filter by...

Select all (15)

NTBMONNACPRNDES

POSACCPINCOMSRV

Open Tasks

# 100

Scheduled Tasks

# 300

AVG Tasks per Technician

# 6.35

AVG Technician Utilization

# 68.98

AVG Forecasted Driving time

# 118.96

AVG Driving Time

Less than 15 mins	91.0%
Between 15 and 30 mins	6.5%
Over 30 mins	2.6%

Skill Matching

Matches	73.8%
Overqualified	25.6%
Underqualified	0.7%

**SLA Compliance Forecast**  
by Day

© Zinier, Inc. | Proprietary and Confidential | Last Update: 29/06/2021

Page 108