



Zinier Core Capabilities

Field Service Elements (FSE)

LAST UPDATED: 21/10/2021

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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

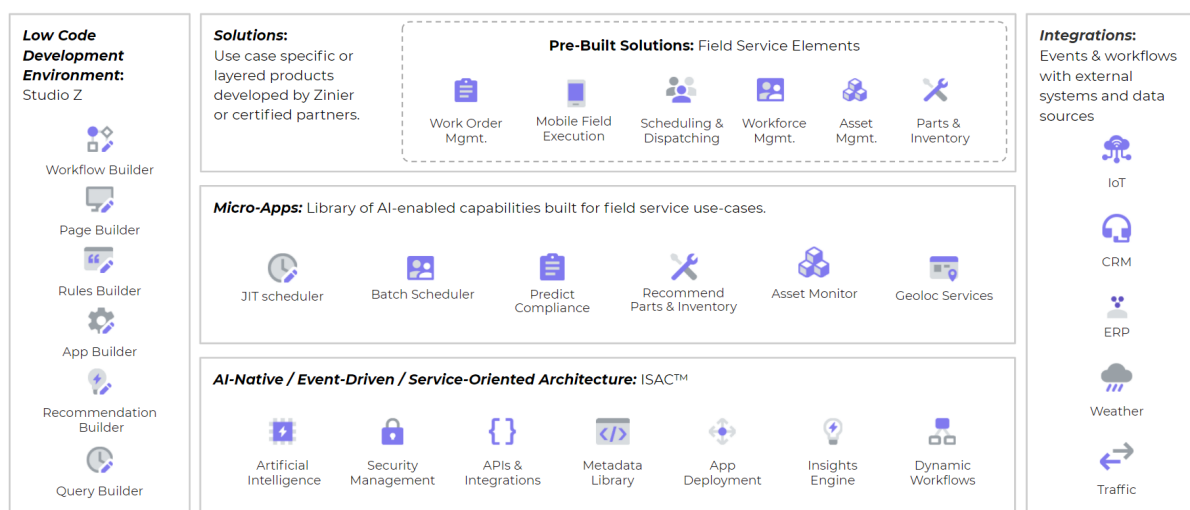
We empower field service organizations to deliver always-on service now, while future-proofing for the long term. Our platform is AI-native, configurable, and accessible - enabling teams to work smarter and focus on uniquely human tasks.

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.

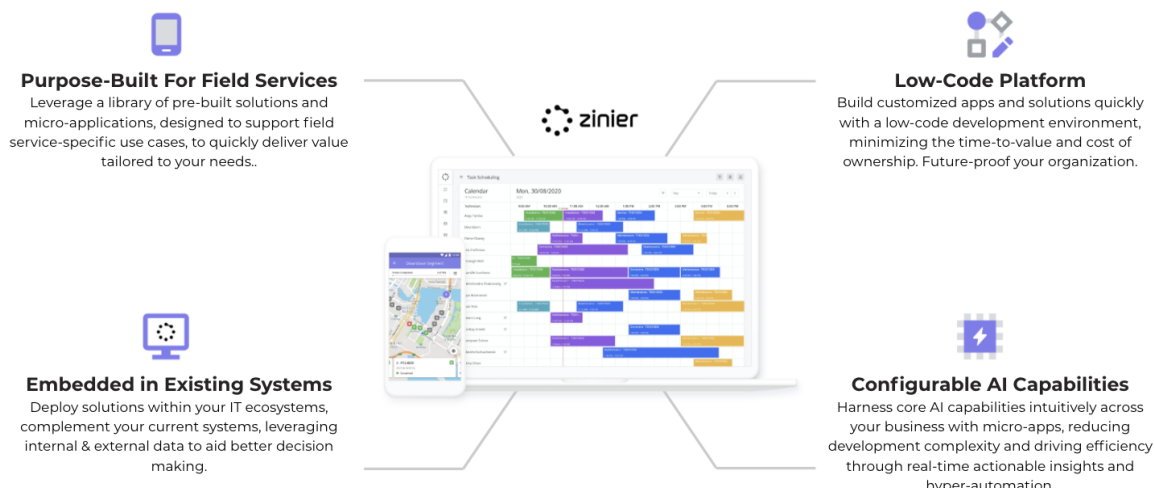
The diagram below provides an overview of Zinier's platform.



Zinier platform

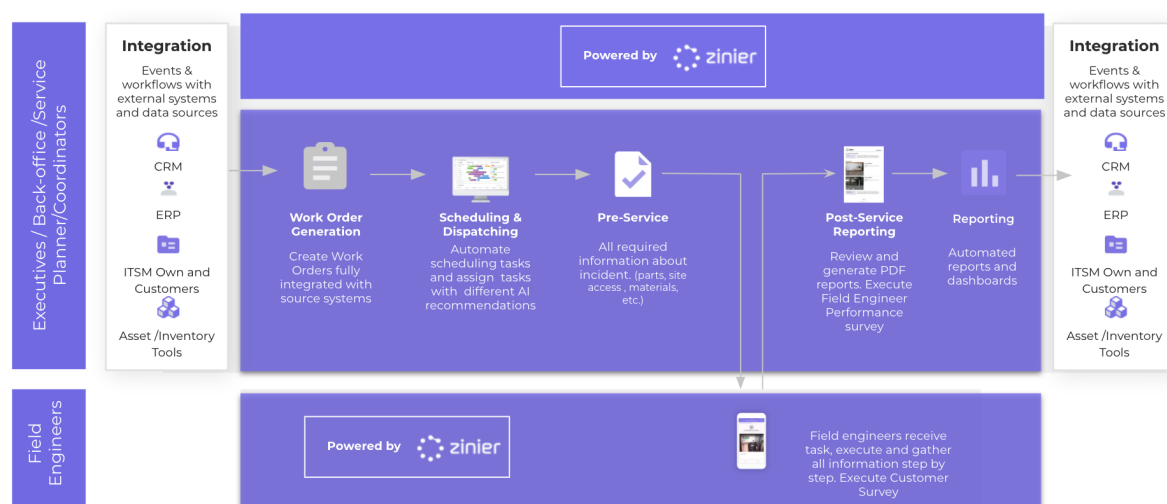
At Zinier, we are dedicated to bringing key value to our customers through:

- **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, the 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 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 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.

Dispatch Console

Master: You are not in any Branch

19

Dispatch Console

Calendar View

Scheduler

4 Technicians

Feb 02, Tuesday

2021

< > February 2, 2021

Today Days Week Month

Feb 2, Tuesday

| | 10:00 AM | 11:00 AM | 12:00 PM | 1:00 PM | 2:00 PM | 3:00 PM | 4:00 PM | 5:00 PM |
|----------------------|------------------------------------|------------------------------------|------------------------------------|---------------------------------|--------------------------------|---------|--------------------------------|--------------------------------|
| Alexander Bolt | | | ⚠ TSK001409 11:30 AM - 12:30 PM | TSK001412 12:40 PM - 1:40 PM | TSK001414 2:00 PM - 3:00 PM | | | |
| Gabriel Paredes | ⚠ TSK001406 10:00 AM - 11:00 AM | | TSK001410 12:00 PM - 1:00 PM | | TSK001416 2:00 PM - 3:00 PM | | TSK001418 3:40 PM - 4:40 PM | TSK001420 5:20 PM - 6:20 PM |
| Hector Riccio | | ⚠ TSK001408 11:00 AM - 12:00 PM | ⚠ TSK001421 12:30 PM - 1:30 PM | | TSK001417 2:50 PM - 3:50 PM | | TSK001419 4:30 PM - 5:30 PM | |
| Lourens Reijgersberg | ⚠ TSK001407 10:30 AM - 11:30 AM | | TSK001411 12:00 PM - 1:00 PM | TSK001413 1:20 PM - 2:20 PM | TSK001415 2:40 PM - 3:40 PM | | | |

Start typing to search...

Open Tasks

27 Records

Status

Work Order ID

Deadline

Scheduled

Task Type

Task ID

☐

Scheduled

WKORD001002

04-02-2021 02:30:00...

03-02-2021 10:30:00...

Corrective Maintena...

TSK00...

Bulk Dispatch Task

Auto Schedule

Recommendations

5 Records

Yesterday

HIGH

The SLA for the task TSK001421 is about to be breached, we recommend you to ass...

Reject

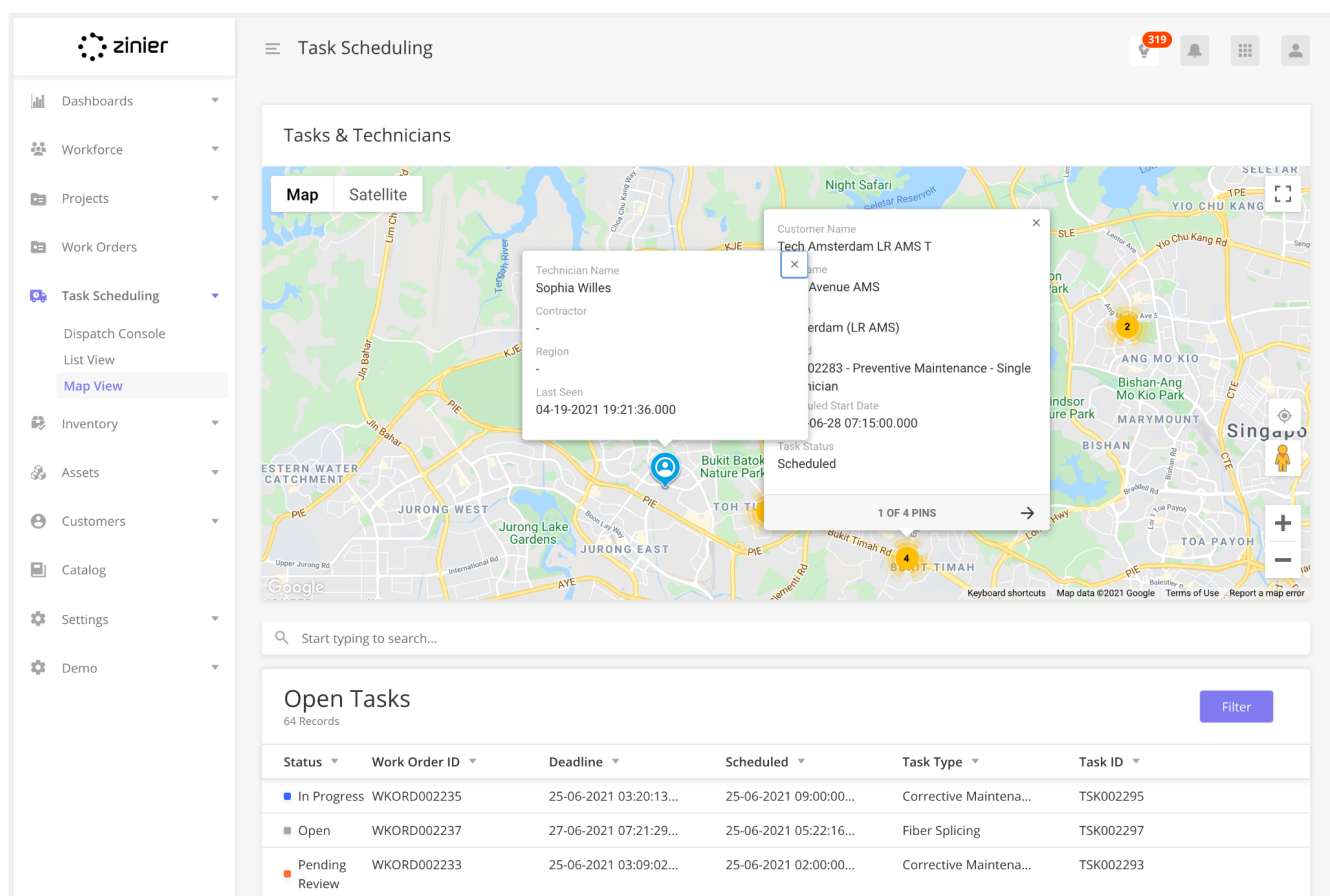
Accept

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 Map View interface. On the left is a sidebar with navigation options: Dashboards, Workforce, Projects, Work Orders, Task Scheduling (selected), Inventory, Assets, Customers, Catalog, Settings, and Demo. The main area shows a map of Singapore with a pop-up window for a technician named Sophia Willes. The pop-up includes details such as Contractor, Region, Last Seen, and Task Status. Below the map is a search bar and a table of Open Tasks.

| 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:



Studio Z

Org Config

App Stores

Users

Workforce

Work Orders

Task Scheduling

List View

Calendar View

Inventory

Assets

Customers

Billing

Settings

Open Tasks

Master: You are not in any Branch

Open Tasks

Dispatched

Pending Review

Closed Tasks

Start typing to search...

Open Tasks

54 Records

Auto Schedule

| 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.
- **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.



- Dashboards
- Workforce
- Work Orders
- Task Scheduling
 - Dispatch Console
 - List View
- Inventory
- Assets
- Customers
- Catalog
- Settings

Pending Review

Open Tasks
Dispatched
Pending Review
Closed Tasks

Start typing to search...

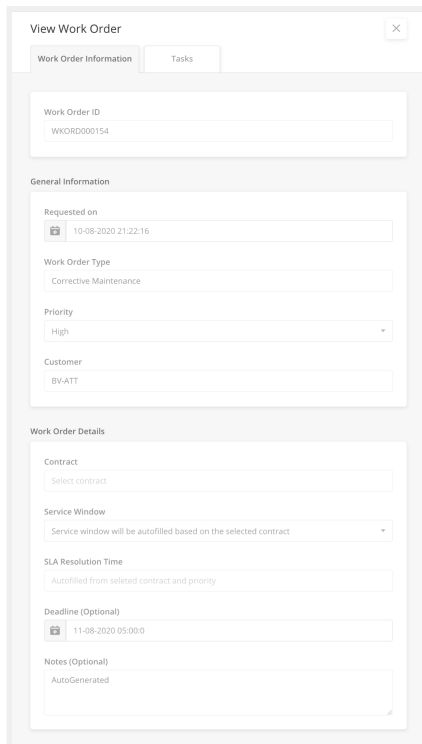
Pending Review Tasks

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 | View Work Order |
| 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 |

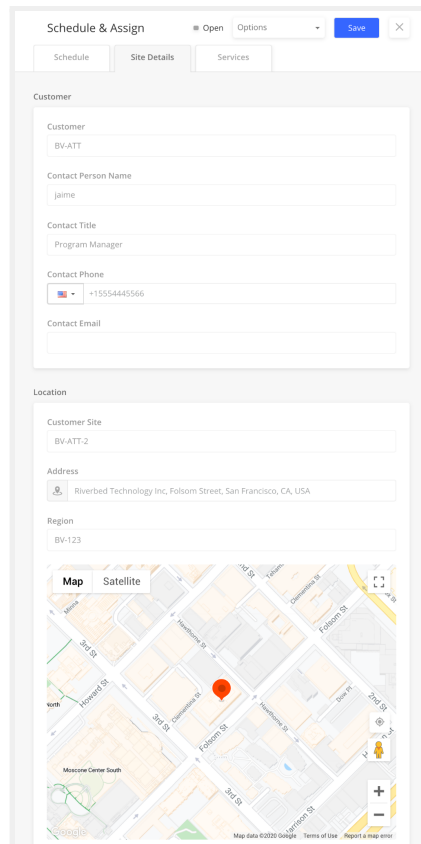
View Work Order Details

View the full Work Order details associated with the task.



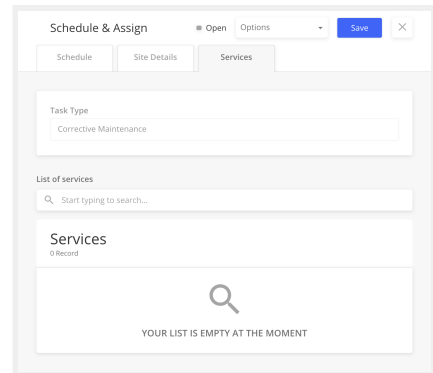
View Site Details

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



View Services

View the Services associated with the Task.



Task Assignment

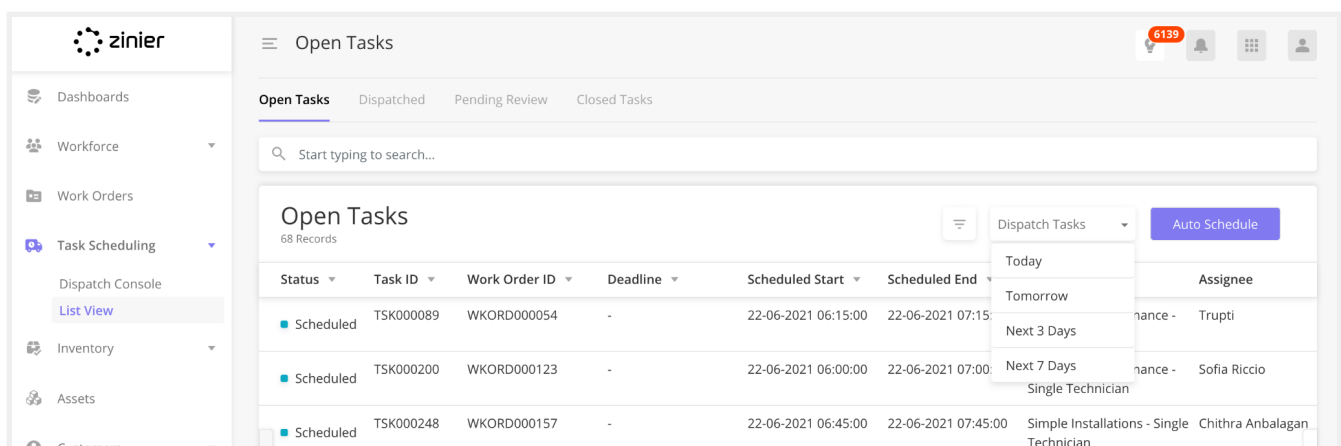
Manual Task Assignment [\(Updated V2.5\)](#)

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 Zinier application interface. On the left is a sidebar with navigation options: Dashboards, Workforce, Work Orders, Task Scheduling (selected), Dispatch Console, List View, Inventory, Assets, and Customers. The main area is titled 'Open Tasks' and has tabs for Open Tasks, Dispatched, Pending Review, and Closed Tasks. Below the tabs is a search bar. The 'Open Tasks' tab is active, showing a table with 68 records. The table has columns: Status, Task ID, Work Order ID, Deadline, Scheduled Start, and Scheduled End. Three tasks are visible, all with a status of 'Scheduled'. A dropdown menu is open over the table, showing options: Dispatch Tasks, Auto Schedule, Today, Tomorrow, Next 3 Days, Next 7 Days, and Single Technician. The 'Today' option is currently selected.

| Status | Task ID | Work Order ID | Deadline | Scheduled Start | Scheduled End |
|-----------|-----------|---------------|----------|---------------------|---------------------|
| Scheduled | TSK000089 | WKORD00054 | - | 22-06-2021 06:15:00 | 22-06-2021 07:15:00 |
| Scheduled | TSK000200 | WKORD000123 | - | 22-06-2021 06:00:00 | 22-06-2021 07:00:00 |
| Scheduled | TSK000248 | WKORD000157 | - | 22-06-2021 06:45:00 | 22-06-2021 07:45:00 |

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 - If 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
X

Schedule
Site Details
Serv

Dispatch Task
Cancel Task

Schedule

Deadline
11-08-2020 05:00:0

Scheduled Start Date
11-08-2020 01:04:44

Estimated Task Duration (In minutes)
60

Technician

Assign Technician
Arun Chetty
X
View Technicians

Task Details

Task ID
TSK000471

Task Type
Corrective Maintenance

Work Order ID
WKORD000154

Work Order Type
Corrective Maintenance


Priority
High

Customer Site
BV-ATT-2

Notes (Optional)
AutoGenerated

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.



- Dashboards
- Workforce
- Work Orders
- Task Scheduling
 - Dispatch Console
 - List View
- Inventory
- Assets
- Customers
- Catalog
- Settings

Pending Review

Open Tasks
Dispatched
Pending Review
Closed Tasks

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 | 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

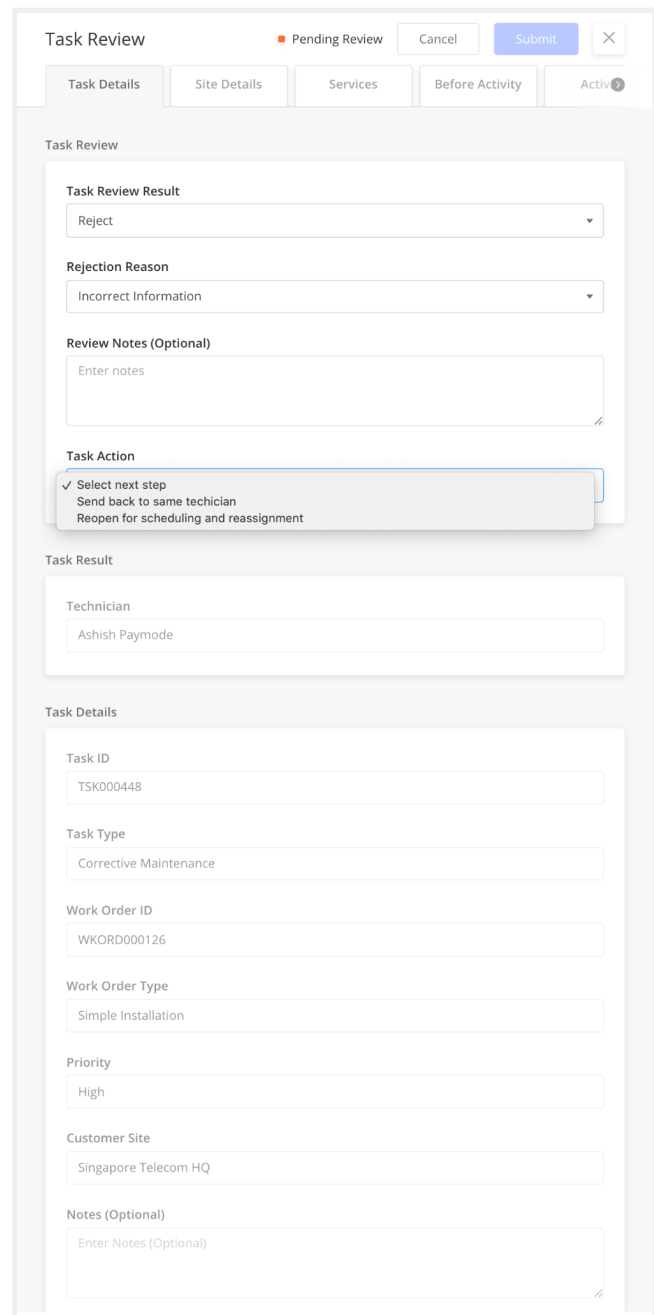
| Captured On | Photo Taken | Captured By |
|----------------------|---|-------------|
| 24/12/2019, 11:09 AM |  | Adam |
| 24/12/2019, 11:00 AM |  | Bane |

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 the 'Task Review' form with the following sections:

- Task Review Header:** Includes 'Task Review', 'Pending Review' status, and 'Cancel' and 'Submit' buttons.
- Task Details:** A tabbed interface with 'Task Details', 'Site Details', 'Services', 'Before Activity', and 'Active' tabs.
- Task Review Form:**
 - Task Review Result:** A dropdown menu with 'Reject' selected.
 - Rejection Reason:** A dropdown menu with 'Incorrect Information' selected.
 - Review Notes (Optional):** A text area with the placeholder 'Enter notes'.
 - Task Action:** A list of options: 'Select next step', 'Send back to same technician', and 'Reopen for scheduling and reassignment'. The 'Send back to same technician' option is highlighted.
- Task Result:** A section with a 'Technician' dropdown menu showing 'Ashish Paymode'.
- Task Details:** A section with various 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):** A text area with the placeholder '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

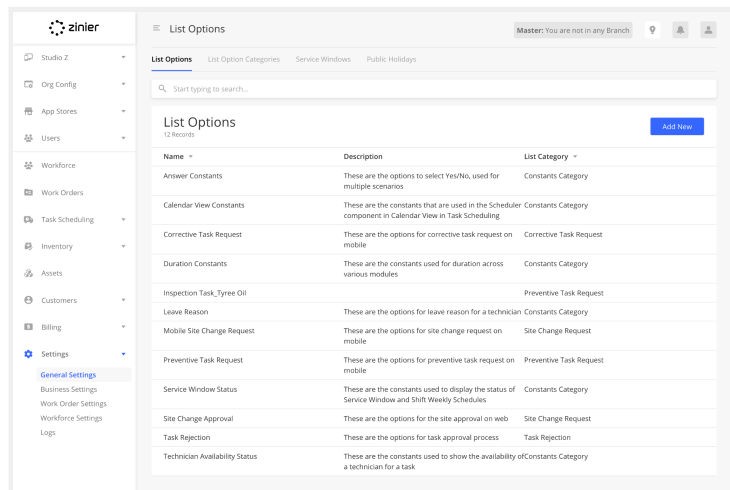
If a technician arrives on site and finds the address of the customer site to be inaccurate, they may submit a Site Change Request to alert web users who can approve to auto-update the address of the customer site or reject to dismiss the request.

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 by the web user, an additional Corrective Maintenance task is added to the Work Order that can be assigned by the web user 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.



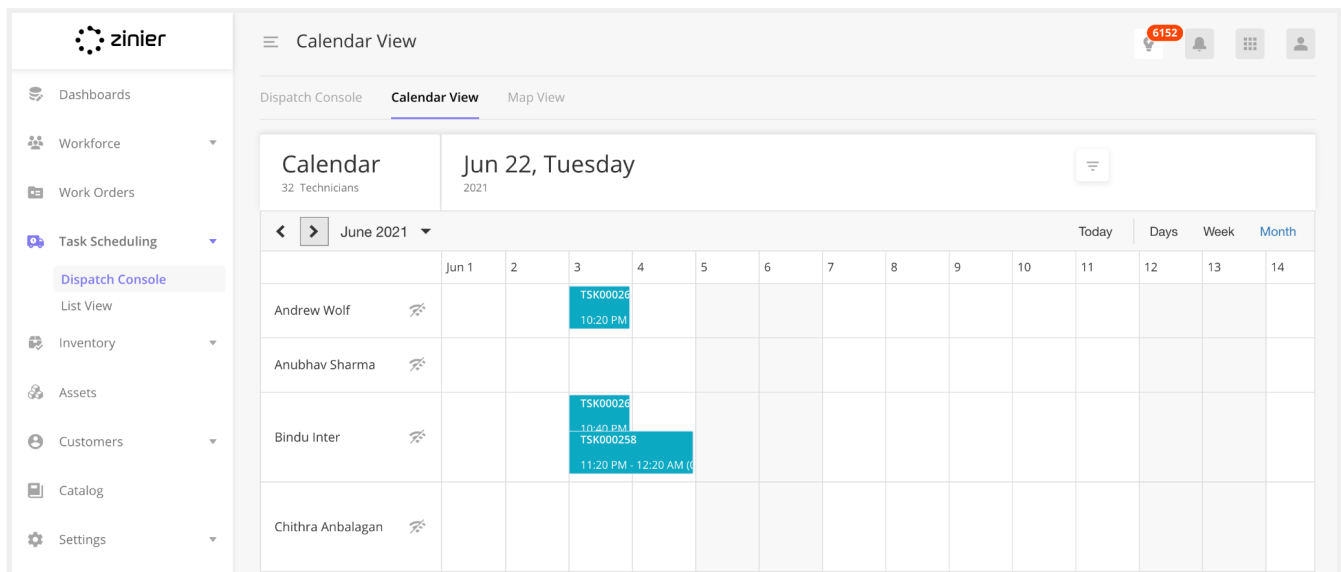
The screenshot shows the 'List Options' page in the Zinier application. The left sidebar contains a navigation menu with items like Studio Z, Org Config, App Stores, Users, Workforce, Work Orders, Task Scheduling, Inventory, Assets, Customers, Billing, and Settings. The 'Settings' menu is expanded, showing 'General Settings', 'Business Settings', 'Work Order Settings', 'Workforce Settings', and 'Logs'. The main content area is titled 'List Options' and has a search bar. Below the search bar is a table with 12 records. The table has three columns: Name, Description, and List Category. The records are as follows:

| 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_Tyre 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.



Schedule & Dispatch Automation

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

the process of scheduling and dispatching multiple tasks. There are two main ways of scheduling tasks.

Scheduling One Task at a Time using Technician Recommendation

When manually assigning tasks one at a time, you can choose to leverage the FSE 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 of 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

View All Technicians

View Recommended Technicians

View All Technicians

Sea

Start typing to search...

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 are 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.

Work Groups

If Work Groups are configured for the Technicians, then Techs must belong to the correct Work Groups in relation to the task. This means that the Customer, Work Order Type, Task Type, Region of the site of the Task being performed should belong to one of the Work Groups that the Tech is assigned to.

Work Groups can be configured in the Workforce module.

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.

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.

Auto-Schedule Tasks

FSE also provides a way to auto schedule/assign tasks in bulk using the ISAC Scheduling engine. In order to do so, the Dispatcher can 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. The Dispatcher can then 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 skill set 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 so that they can be assigned to technicians in the vicinity.

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:

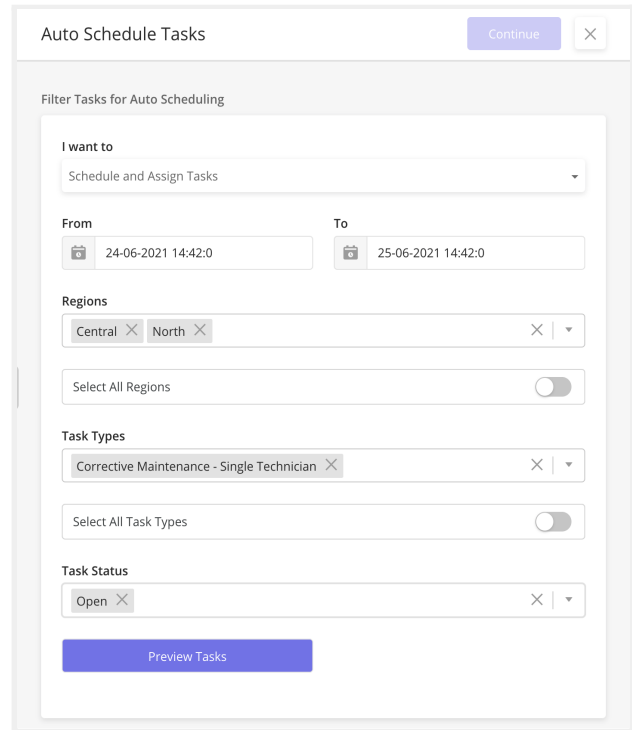
Filters & Scheduling Method

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). This method finds the best suited technician and time of the day when the task should be performed, so as to maintain an optimised schedule.

Assign Pre-Scheduled Tasks to Technicians

Considers tasks that have scheduled start date & time. This method finds the best technician that can perform a task at the time the task was already scheduled, so as to maintain an optimised schedule.



Time Range - Select a time range between which to schedule/assign tasks. FSE currently supports scheduling tasks for the next 10 days.

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 Open tasks, Scheduled, or Dispatched.

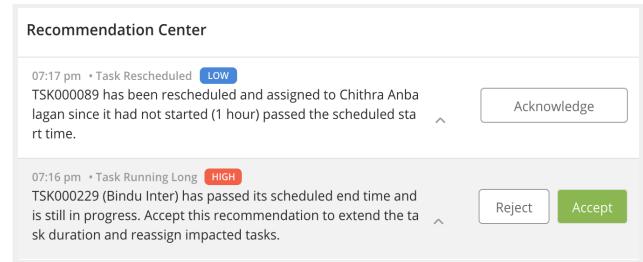
Once the selection is made, users will see a list of the filtered tasks as outlined above. Users then have the option of selecting which tasks from that list to auto-schedule.

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 scheduled start time 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.

Recommendation: Critical

Priority Tasks (New 2.11)

This feature provides recommendations to alert dispatchers about the urgent tasks being

Recommendation: SLA in

Jeopardy (New 2.11)

This feature provides actionable recommendations whenever a task is at the risk of breaching SLA.

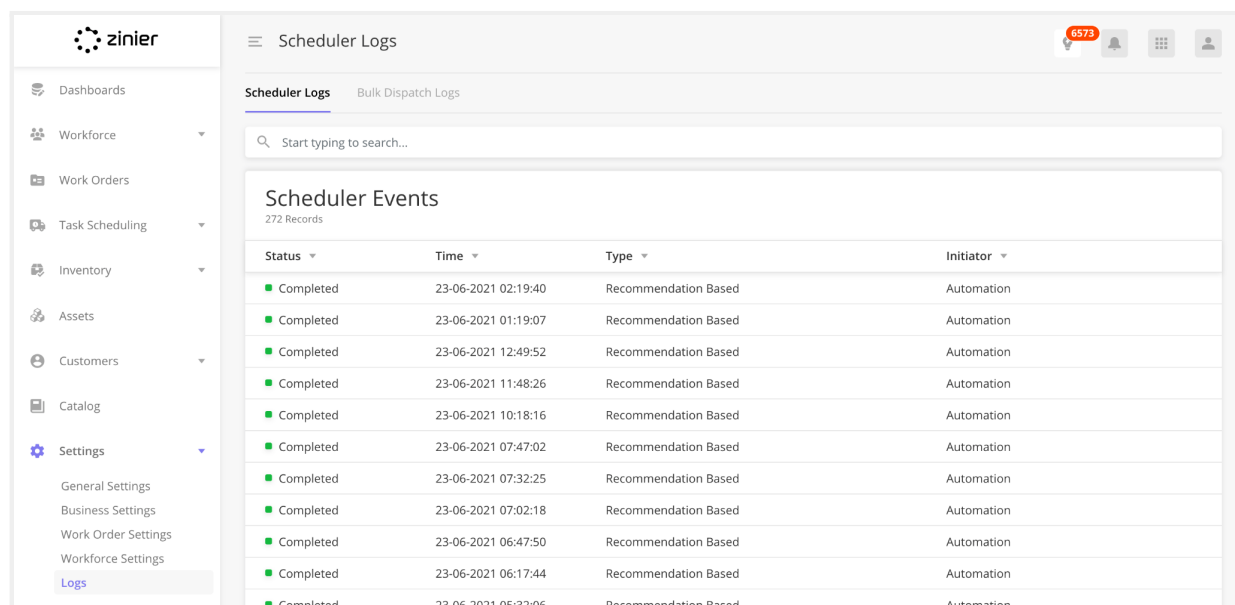
created and automatically reshuffles the schedule to make room for urgent tasks.

- An Active recommendation is sent to schedule any task which is created for a Work Order with a Critical priority
- On accepting the recommendation, the Critical priority task is assigned to the best technician available at the time of the task.
- If no technician is available at the time of the task, then a Low or Medium priority task is bumped out from the Schedule of one of the technicians so as to make room for the Critical Priority task.
- The bumped out task is then rescheduled/reassigned based on its SLA Deadline.
- An active recommendation is sent to schedule and dispatch any task which has a SLA deadline within 24 hrs and is in Open, Reopened, or Discontinued status
- An active recommendation is sent to dispatch any task which has a SLA deadline within 12 hrs and is in Scheduled status
- A passive recommendation is sent to check on any task which has a SLA deadline within 1 hr and is in Transit and further status

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 06:27:06 | 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 Maximum Proximity** - Define a maximum 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 will make it easier for the Dispatcher to select the best technician for the task.

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.

Scheduling Settings

Save

×

Description

These settings allow you to configure different aspects of scheduling automation in the Task Scheduling module. Review the default options below and make adjustments if needed.

Use Skills

Exclude Technicians who do not have the necessary skills based on the task type.

No

Proximity

Filter out technicians with a current location or base location outside of this range.

Range (Kilometers)

9999

Primary Optimization Method

Experience Score to prioritize the most experienced technicians

Utilization to even distribute tasks amongst technicians

✓ Route to minimize travel time between tasks

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:

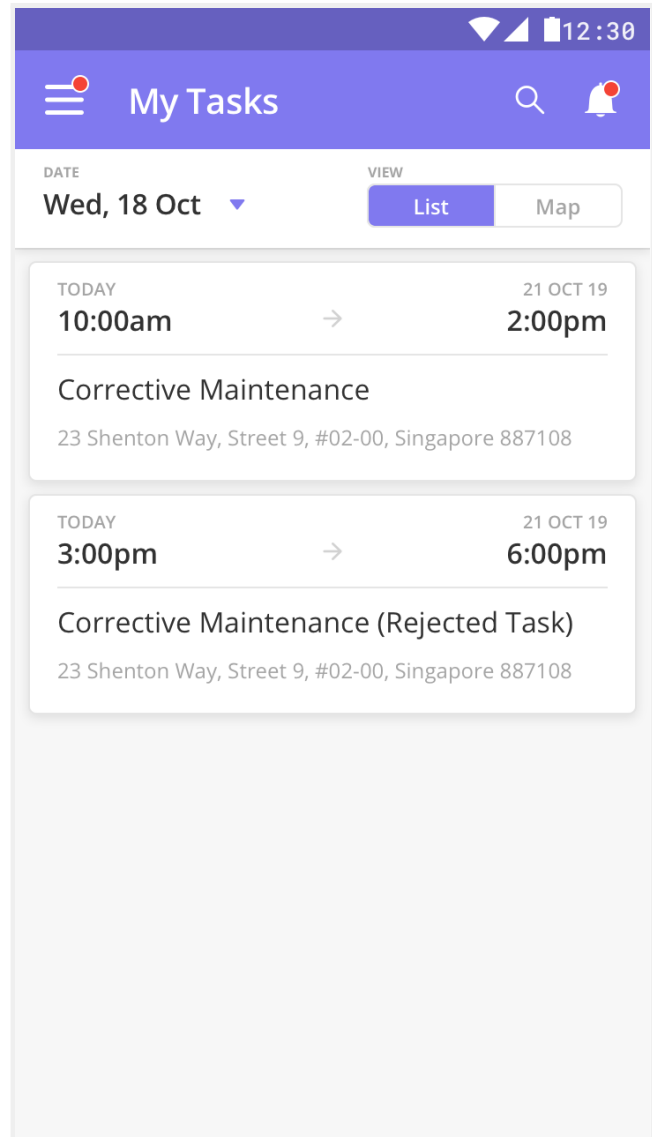
- Site Change Request
- Request a Corrective Maintenance Task
- Incident Reporting
- Discontinue a Task
- Report a Task Delay

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



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 to automatically update the Customer Site record in Zinier.


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


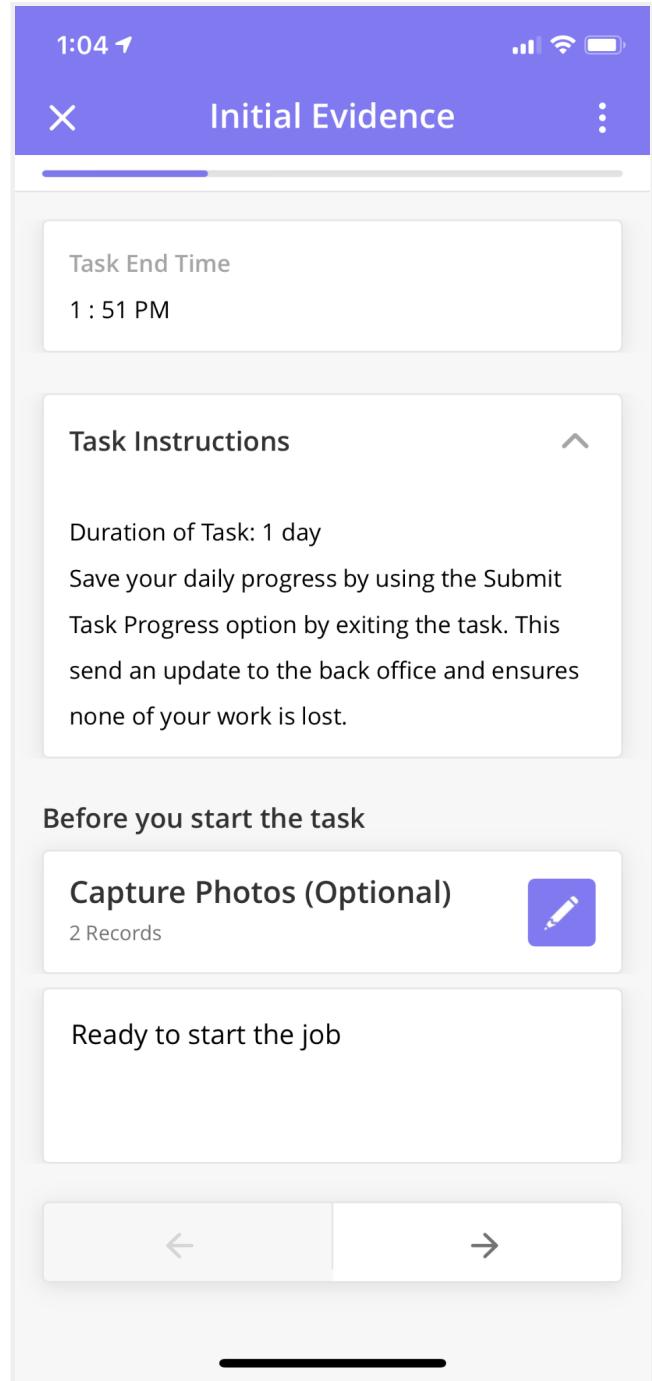
Relocation

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 (Updated v2.10)

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



1:04

X
Initial Evidence

Task End Time

1 : 51 PM

Task Instructions

Duration of Task: 1 day
Save your daily progress by using the Submit Task Progress option by exiting the task. This send an update to the back office and ensures none of your work is lost.

Before you start the task

Capture Photos (Optional)

2 Records

Ready to start the job

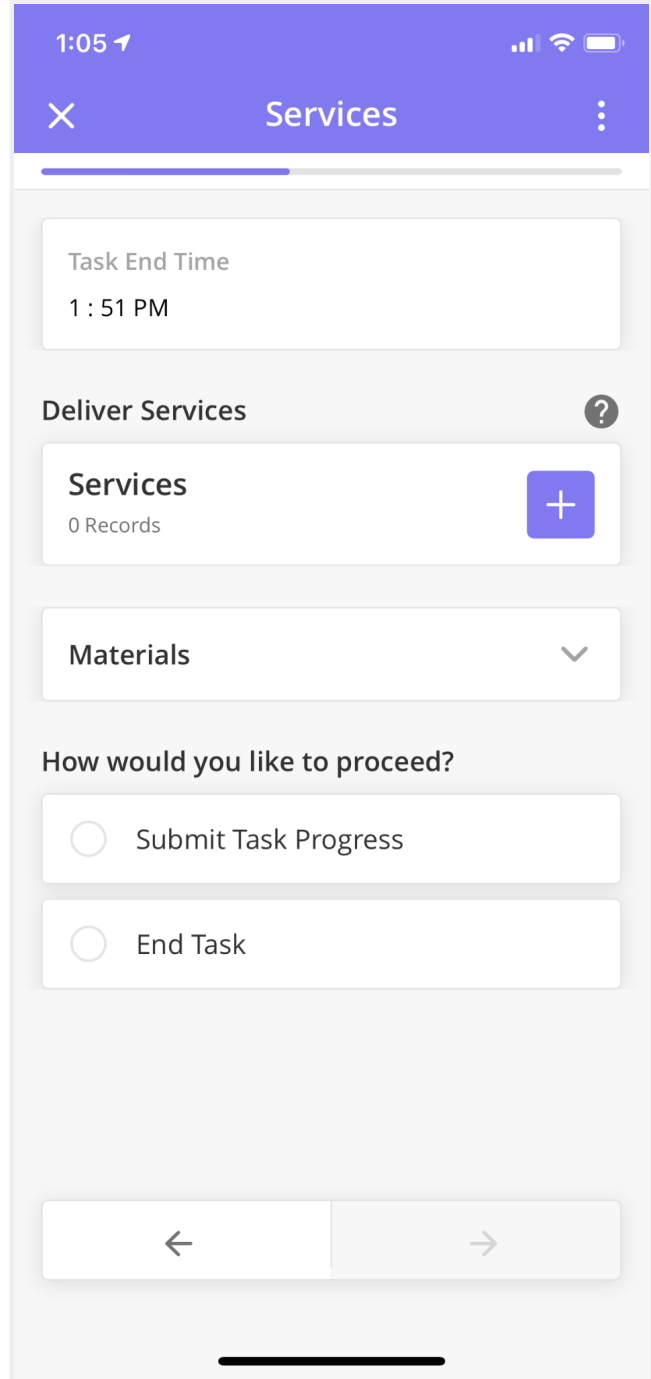
←

→

Step 5: Begin Work by Adding Services

(Updated v2.10)

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.



1:05

Services

Task End Time
1 : 51 PM

Deliver Services ?

Services
0 Records

Materials

How would you like to proceed?

☐ Submit Task Progress

☐ End Task

← →

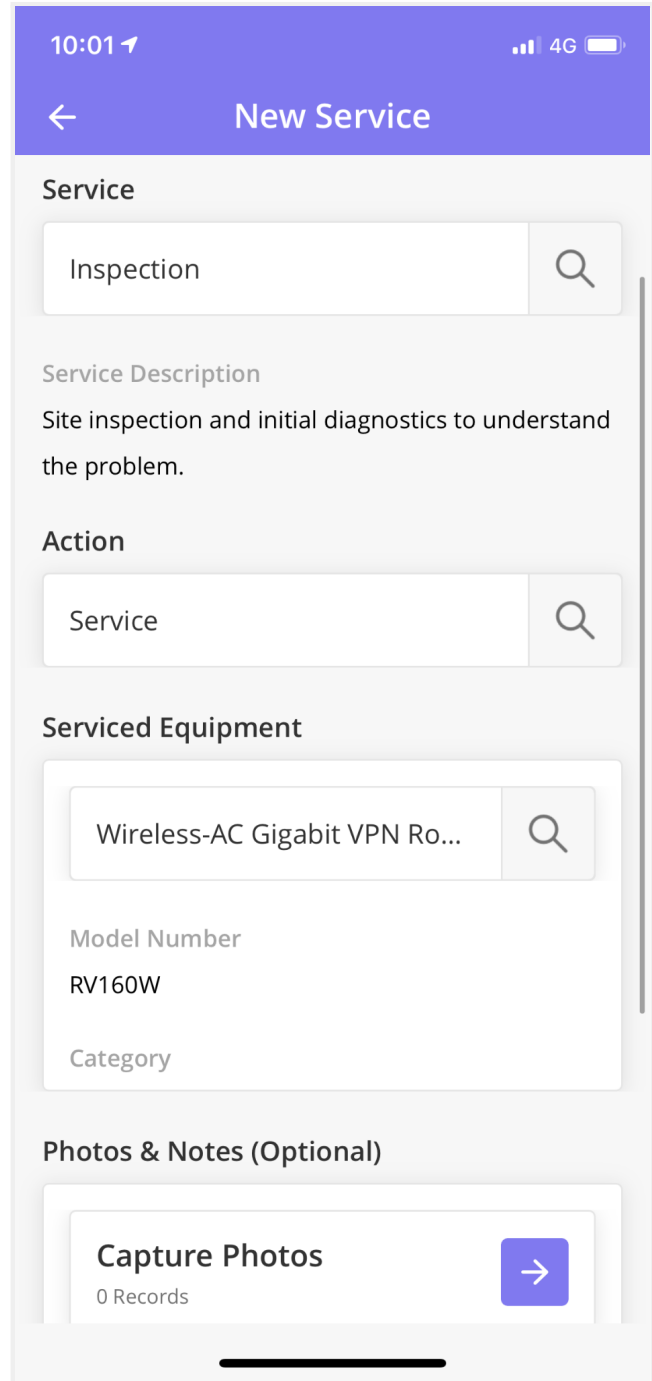
Step 6: Complete Each Service Task (Updated v2.10)

Once a Service is selected, technicians can choose one of the following actions.

- **Service**
Select an asset on the site that has to be serviced and capture the details.
- **Install**
Select a part from the catalog that will be installed at the customer site.
- **Replace**
Select the existing asset that has to be replaced and select a part from the catalog that will be installed at the customer site.
- **Remove**
Select the existing asset that has been removed. The asset will also be removed from the the customer site.
- **Other**
No asset has to be selected and can be used for capturing more generic data.

Upon task approval, the asset module is updated with the above selected data and the asset logs are auto-updated on the web according to the following events.

- Date and time of asset installation
- Date and time of asset removal
- Date and time of asset servicing/service delivered



10:01 4G

New Service

Service

Inspection

Service Description

Site inspection and initial diagnostics to understand the problem.

Action

Service

Serviced Equipment

Wireless-AC Gigabit VPN Ro...

Model Number
RV160W

Category

Photos & Notes (Optional)

Capture Photos
0 Records

Step 7: Repeat for Additional Services as Needed

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

Step 8: Capture Evidence After Completing Work and either report progress or end task (Updated v2.10)

Once the task is done by the technician, he or she can capture any parts and materials used.

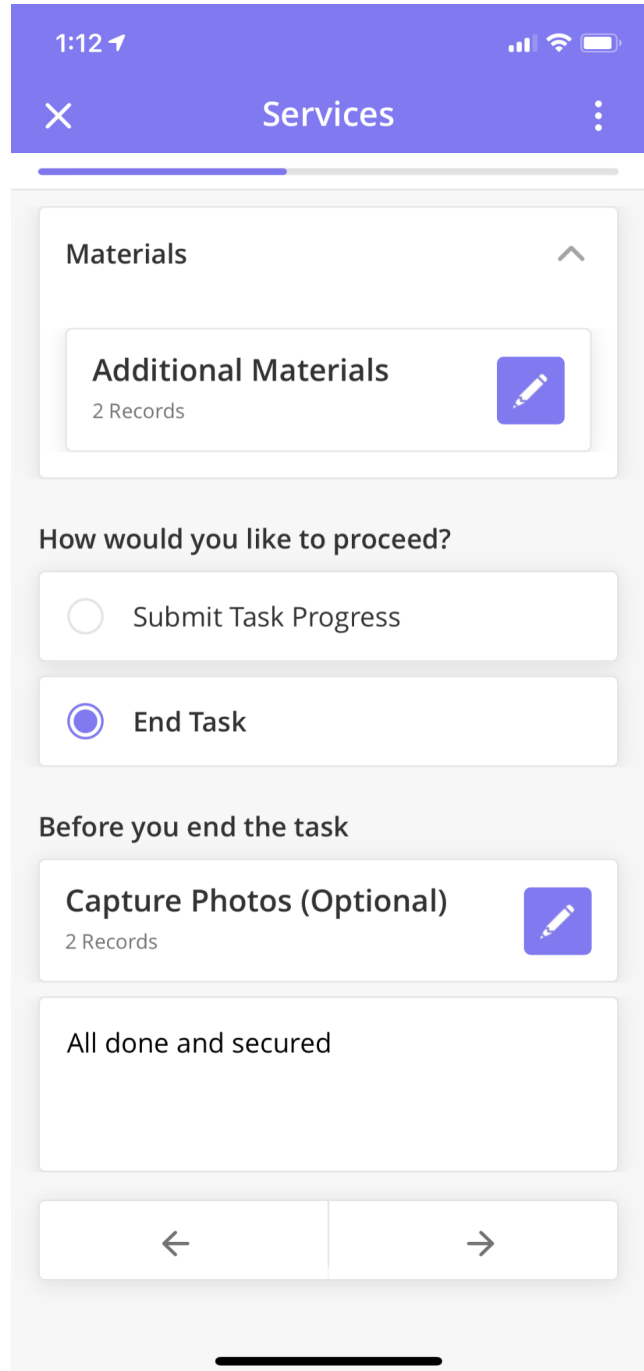
Submit Task Progress (can be used for multi-day tasks)

At the end or during the day a technician can choose to submit the progress. In this case, all progress is updated and available for the web user in Task Scheduling on the web.

The task can be continued on the same day or at a later date by the technician.

End Task

When all actions in the task are completed, final evidence in the form of photos can be added and task has to be submitted for review.

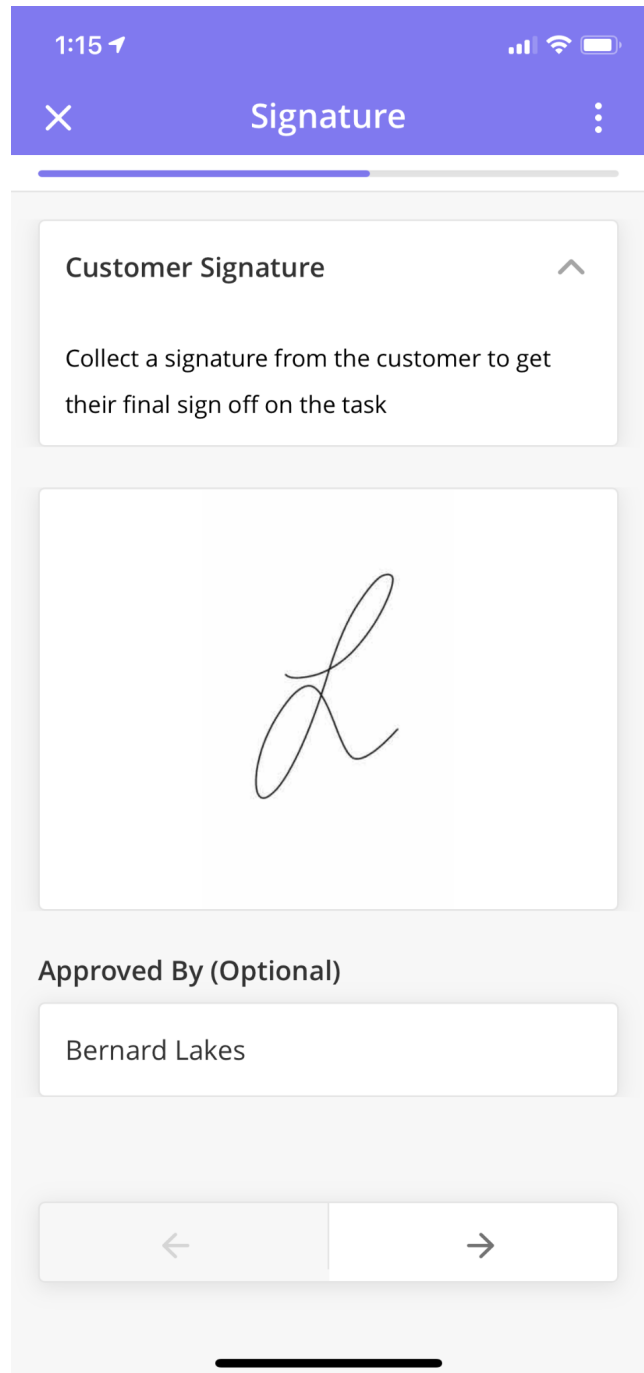


The screenshot shows the 'Services' screen in the Zinier mobile app. At the top, there's a status bar with the time 1:12 and signal/battery icons. Below the status bar is a purple header with a close button (X), the title 'Services', and a menu icon (three dots). The main content area is white and contains several sections:

- Materials**: A section with a title and an upward arrow. Below it is a card titled 'Additional Materials' with '2 Records' and a blue pencil icon.
- How would you like to proceed?**: A section with two radio button options: 'Submit Task Progress' (unselected) and 'End Task' (selected).
- Before you end the task**: A section with a card titled 'Capture Photos (Optional)' with '2 Records' and a blue pencil icon. Below this is a text box containing the text 'All done and secured'.
- Navigation**: At the bottom, there are two white buttons with left and right arrows.

Step 9: End Task and 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.




1:15
Signal
Wi-Fi
Battery

X
Signature
:

Customer Signature ^

Collect a signature from the customer to get their final sign off on the task



Approved By (Optional)

Bernard Lakes

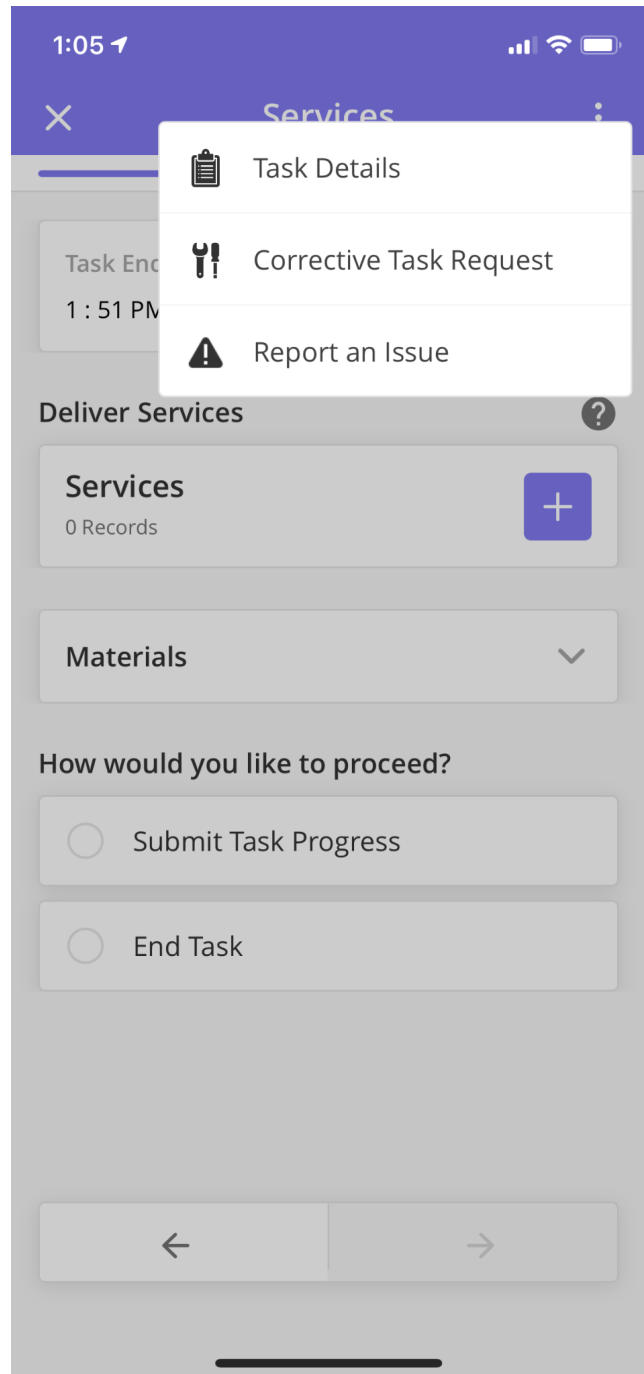
<
>

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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.


Task Details
12:30

Task Details



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

Customer
ACME Corporation

Site Contact Number
+14158423774

Work Order ID
WO187423

Task ID
TSK019384


Task Type
Corrective Maintenance

Priority
High

Task Start Date & Time
24-12-2018 14:00

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.

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.



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



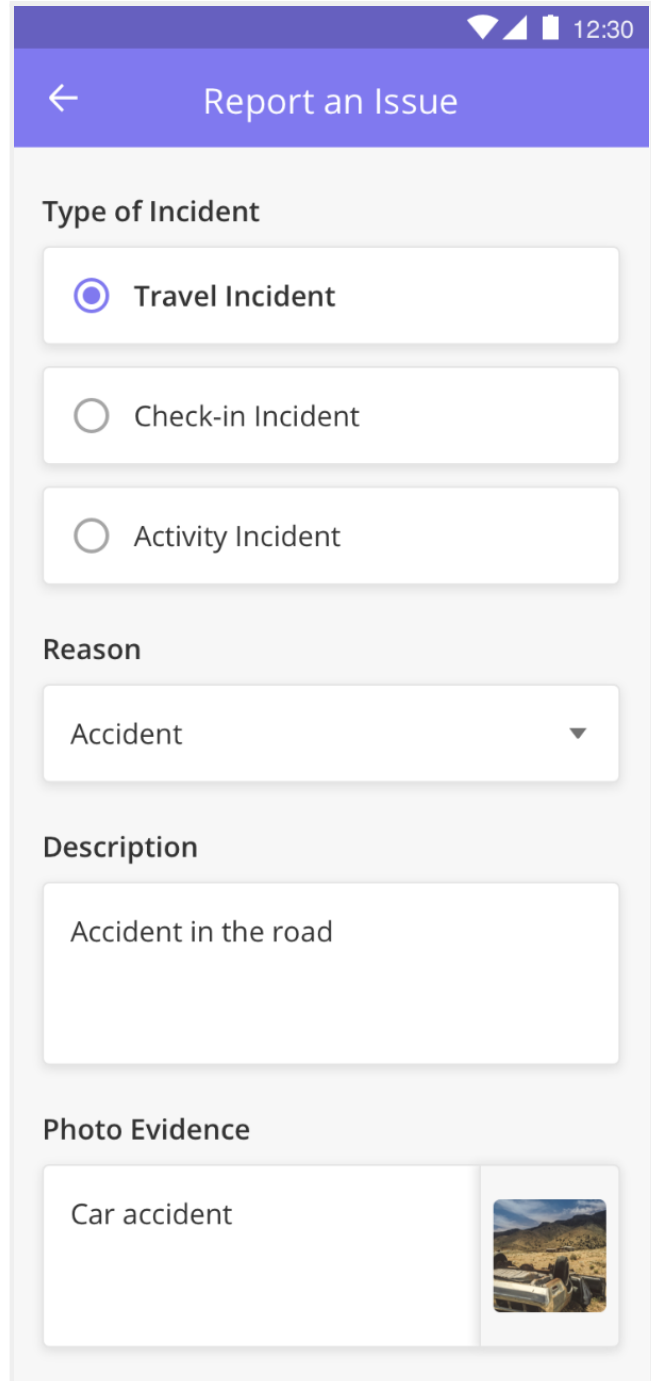
Report an Issue - While performing a Task, Technicians access workflow actions to report non-blocking incidents (incidents that do not result in task cancellation or delay).

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



Type of Incident

☒ Travel Incident

☐ Check-in Incident

☐ Activity Incident

Reason


Accident ▼

Description

Accident in the road

Photo Evidence

Car accident



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?

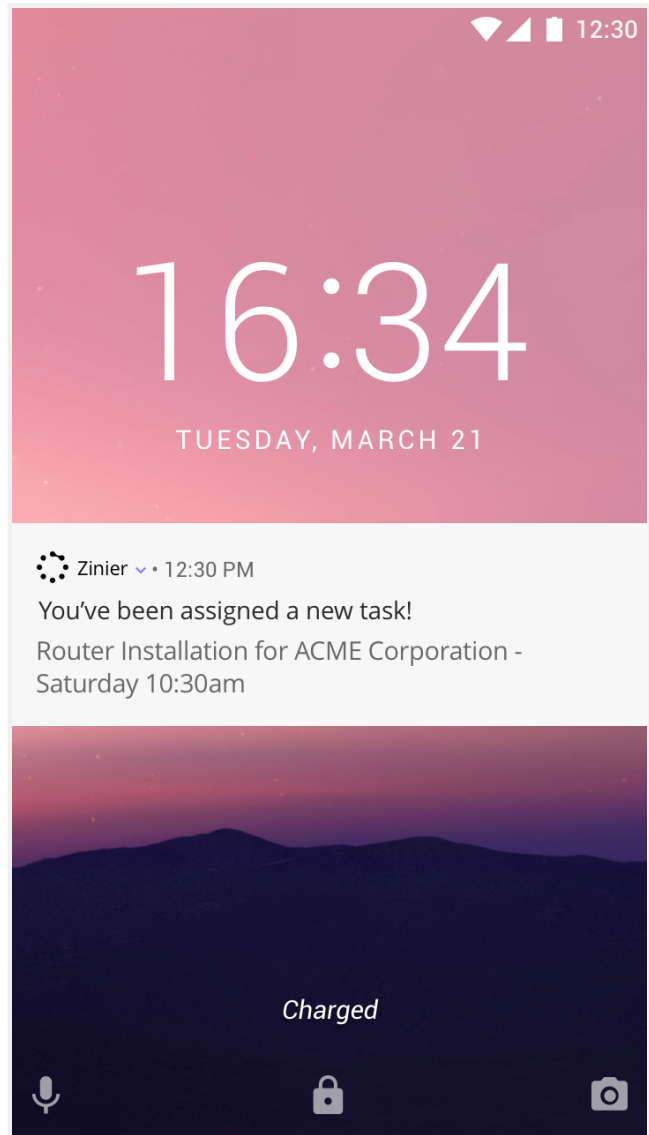
☐ Continue with Task
 

☐ 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
- SLA Breach Nearing



Crew Tasks

There are some differences when dispatching tasks to crews. A crew always consists of a crew lead and crew member(s). When creating a task on the web we currently support two processes.

- **Crew - No Access**

A task is assigned to the crew and the Zinier app is used by the Crew lead to check the crew members as well as capturing the same data points in a regular task(See the mobile workflow steps section above). Crew Members do not have access to the Zinier mobile app.

- **Crew - Partial Access**

A task is assigned to the crew and the Zinier app is used by the Crew lead to capture the same data points in a regular task(See the mobile workflow steps section above). Crew Members receive a check-in task with geofencing to check in and check out in order to register attendance. Crew members can't capture any task details such as (Values, photos, etc.)

In both cases, an additional workflow action is added where the Crew lead can view which members are on the crew.

Please note that crew tasks are not considered by the auto schedulers.

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:

- **Task Results**

Select to view Progress reports per day or per service as well as the captured customer signature

- **Task Details**

Original information about the task including schedule, priority, assignee, and more.

- **Site Details**

View information(address, contact person, etc.) on the site where the task has been performed.

- **Attendance**

View check-in and checkout times(these are available each time task progress is submitted from the app)

- **Price List Items**

An overview of all the parts and materials that were used during the task

- **Incident Logs**

Any incidents reported using the workflow actions in the mobile workflow.

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. The Technician can view the rejection reason and comments in the task in the Zinier App.

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

Task Review

Pending Review

Options

Task Results

Task Details

Site Details

Attendance

Price List

Scheduling

View Progress Reports By

Services

Start typing to search...

Services

3 Records

View Results


| Service Name | Status | Records |
|---|-------------|---------|
| <input checked="" type="radio"/> Inspection | Delivered | 1 |
| <input type="radio"/> Repair Work | Not Started | 0 |
| <input type="radio"/> Safety Check | Not Started | 0 |

Inspection

1 Record

| Completed On | Action | Updated Asset | Captured By |
|---------------------|--------|--------------------------------|----------------------|
| 31-08-2021 01:09:26 | - | Wireless-AC Gigabit VPN Router | Lourens Reijgersberg |

Customer Signature



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

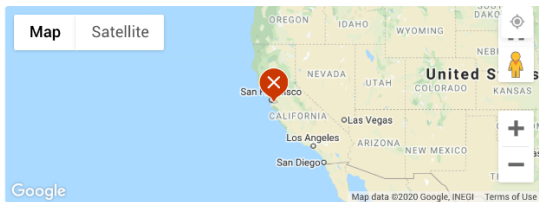
Approve

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

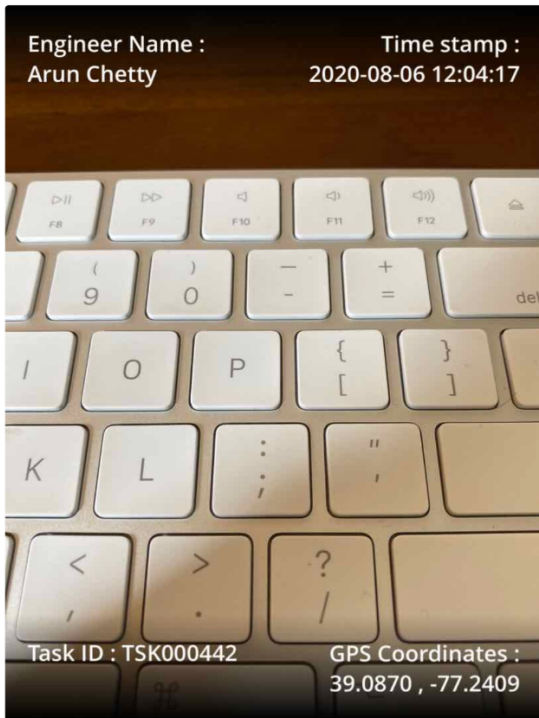
Photo Evidence

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

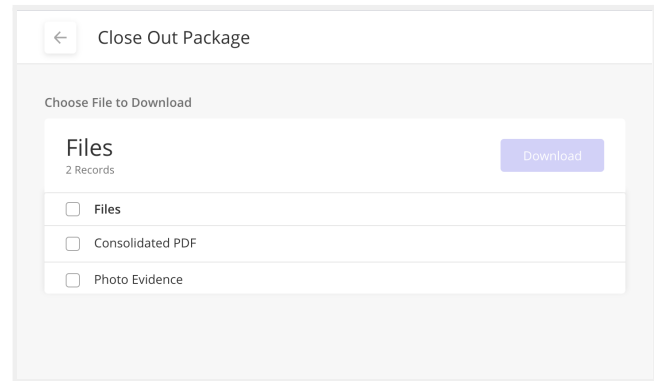
Comments

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.



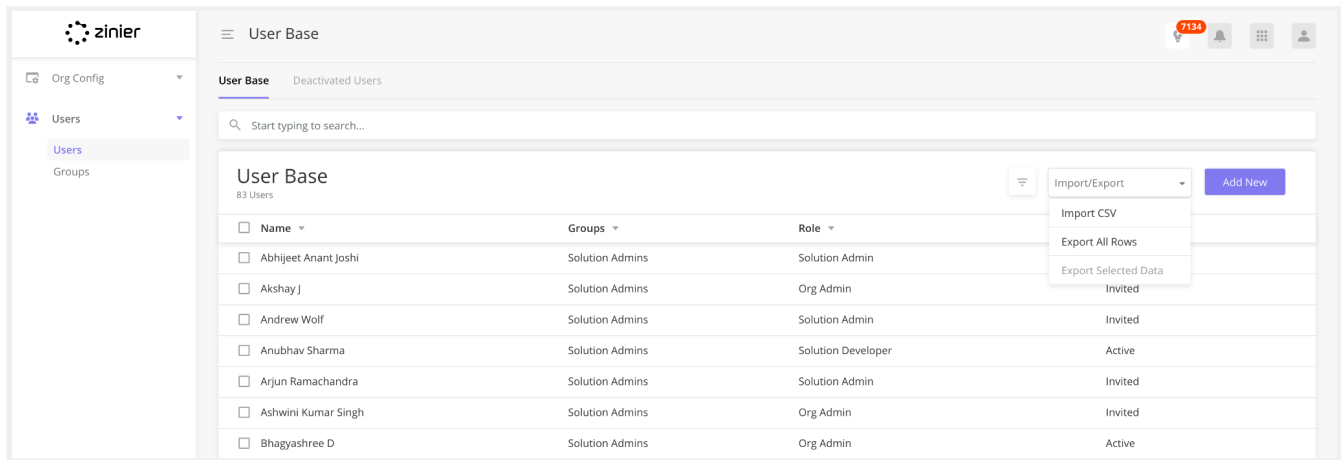
Backoffice Operations

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 in Zinier. The sidebar on the left contains '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', 'Role', and a status column. The status column shows 'Invited' and 'Active' statuses. There are buttons for 'Import/Export', 'Add New', 'Import CSV', 'Export All Rows', and 'Export Selected 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.

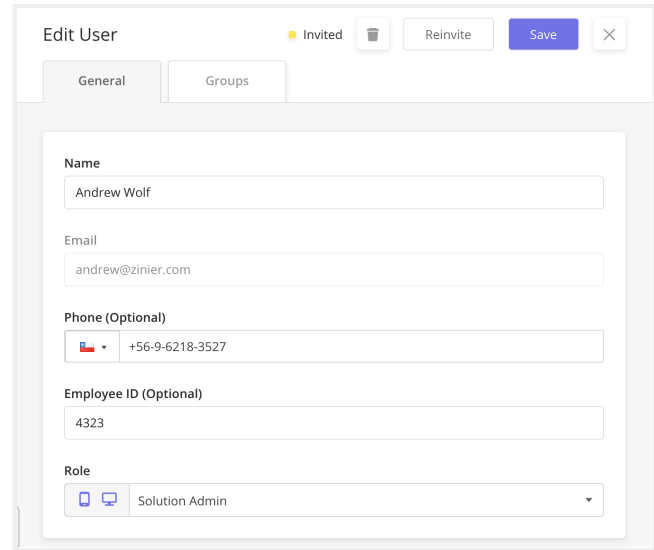
Assign Roles to Users - Zinier has several predefined user roles which determine access rights in the platform (such as mobile app vs. web app access).

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:

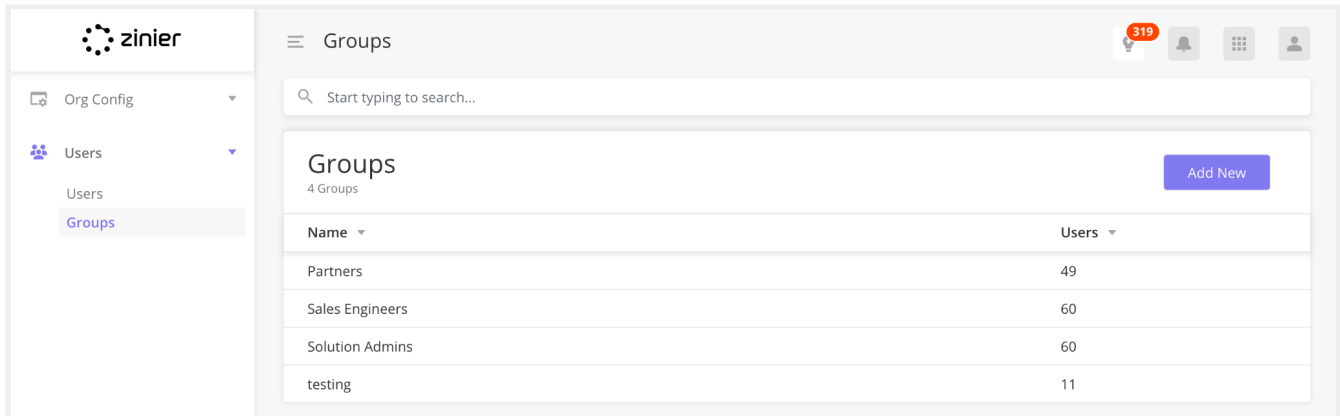
- *Draft*: User is created in Zinier but does not have access to the platform
- *Invited*: User has application access, has received an invitation email, but has not finished setting up their account (i.e. has not accepted the invitation and set their password)
- *Active*: Users become Active once they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



The screenshot displays the 'Edit User' modal in the Zinier application. At the top, there's a title bar with 'Edit User' and a status indicator 'Invited' (yellow dot). To the right are buttons for 'Reinvite', 'Save' (blue), and a close button 'X'. Below the title bar are two tabs: 'General' (selected) and 'Groups'. The main form area contains several input fields: 'Name' (filled with 'Andrew Wolf'), 'Email' (filled with 'andrew@zinier.com'), 'Phone (Optional)' (filled with '+56-9-6218-3527'), and 'Employee ID (Optional)' (filled with '4323'). At the bottom, there's a 'Role' dropdown menu showing 'Solution Admin' with a small icon of a person and a computer.

Groups

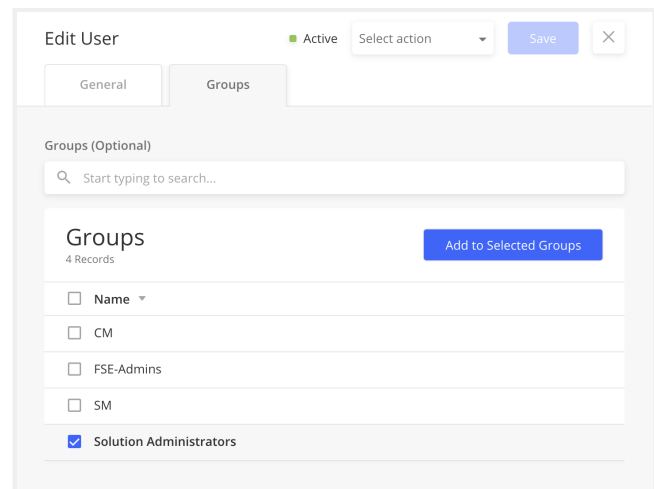
Manage (add and edit) Groups in the organization. Once added, Users can then be assigned to one or more Groups from the Users module.



| Name | Users |
|-----------------|-------|
| Partners | 49 |
| Sales Engineers | 60 |
| Solution Admins | 60 |
| testing | 11 |

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.



| Name | CM | FSE-Admins | SM | Solution Administrators |
|--------------------------|--------------------------|--------------------------|--------------------------|-------------------------------------|
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> |

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.



- Studio Z
- Org Config
- App Stores
- Users
- Workforce
 - Technicians**
 - Web Users
 - Contractors
 - Work Groups
- Work Orders
- Task Scheduling
- Inventory
- Assets
- Customers
- Billing
- Settings

Technicians

Master: You are not in any Branch

Start typing to search...

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 tasks.

Edit Andrew Wolf

Active

Deactivate

Save

×

Technician Information

Skills

Work Schedule

Contractors

?

General Information

Name

Andrew Wolf

Email

andrew@zinier.com

Shift & Work Group

Shift

Weekend Shift SGT

Work Group

All × ?

Contact Information

Address

89 Bukit Drive, Singapore

City

Singapore

State

State is based on selected address

Postal Code

587846

Country

Singapore

Contact Phone

+65

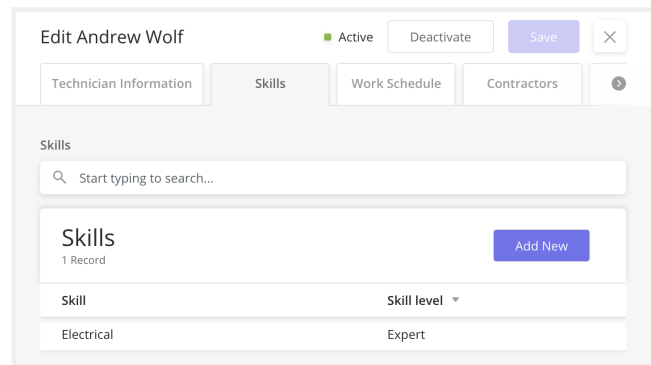
6584523203

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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

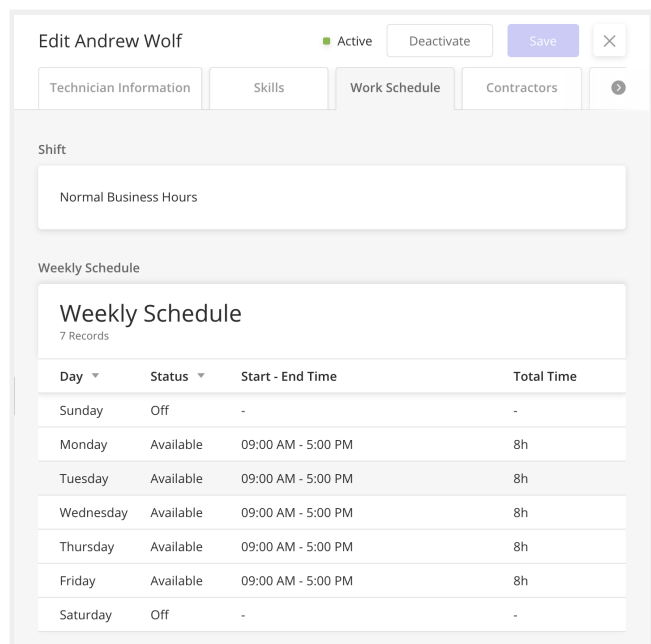
1 Record

Add New

| 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

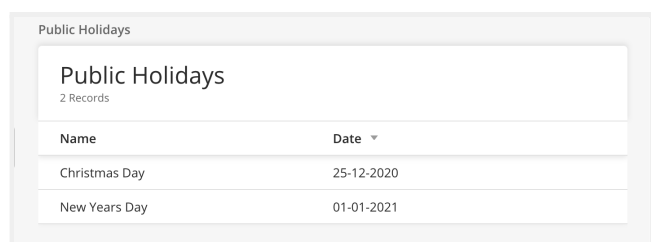
Normal Business Hours

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.



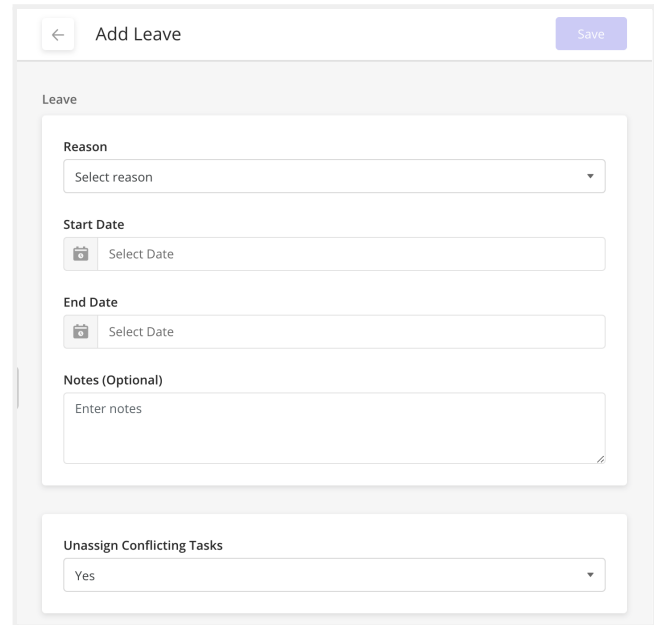
Public Holidays

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.

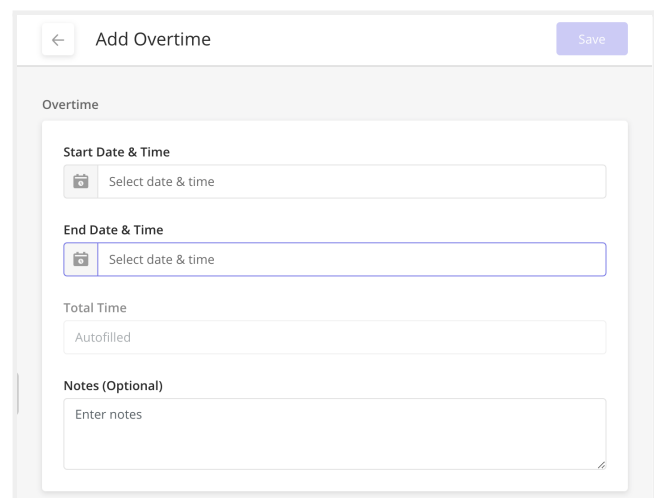
You can choose to automatically un-assign tasks that are conflicting with the leave.



The 'Add Leave' form is a light gray modal window with a title bar containing a back arrow and the text 'Add Leave', and a 'Save' button in the top right corner. The form is titled 'Leave' and contains the following fields:

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

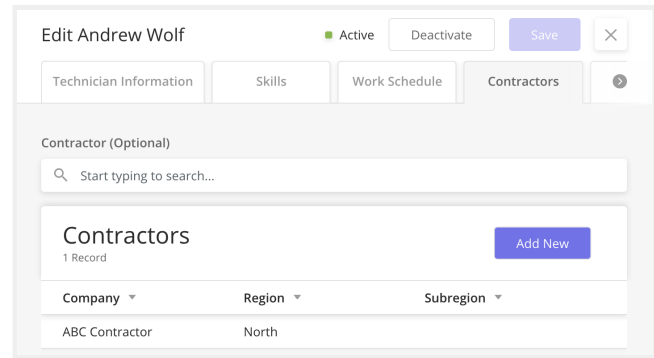
Add Overtime - Add Overtime to a tech's calendar which adds availability to their calendar during the allotted times.



The 'Add Overtime' form is a light gray modal window with a title bar containing a back arrow and the text 'Add Overtime', and a 'Save' button in the top right corner. The form is titled 'Overtime' and contains the following fields:

- Start Date & Time:** A date and time picker field with a calendar icon and the placeholder text 'Select date & time'.
- End Date & Time:** A date and time picker field with a calendar icon and 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.



Contractor (Optional)

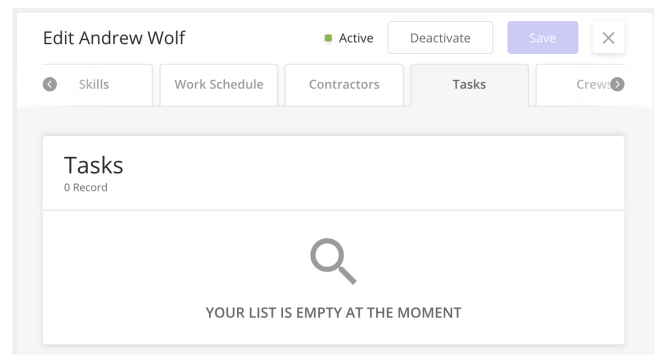
Start typing to search...

Contractors
1 Record

Add New

| Company | Region | Subregion |
|----------------|--------|-----------|
| ABC Contractor | North | |

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



Tasks
0 Record

YOUR LIST IS EMPTY AT THE MOMENT

Crews

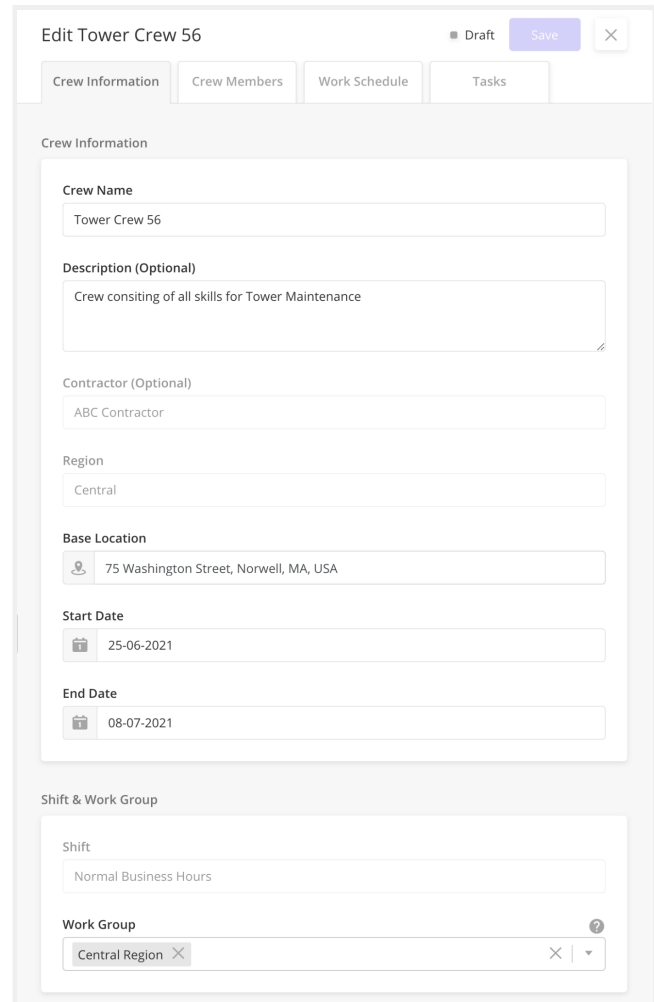
Create a Crew in order to assign multiple technicians to a single task. Crews must have a start and end date, base location, shift, and work group(s), and can optionally be created for a specific contractor.

Page 63

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 X ?

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.



- Dashboards
- Workforce
 - Field Force
 - Web Users
 - Contractors
 - Work Groups
- Work Orders
- Task Scheduling
- Inventory
- Assets
- Customers
- Catalog
- Settings

Web Users

6650

Start typing to search...

Web Users

2 Users

Add New

| 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 |

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

Akshay J

Email

akshay.j@sankeysolutions.com

Role (Optional)

Project Manager

Shift & Work Group

Shift

Weekday Shift India

Work Group

All × Test group ×

Contact Information (Optional)

Address

Kolhapur, Maharashtra, India

City

Kolhapur

State

Maharashtra

Postal Code

95014

Country

India

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

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

Public Holidays

0 Record

🔍

YOUR LIST IS EMPTY AT THE MOMENT

Leave

Leave

0 Record

Add New

🔍

YOUR LIST IS EMPTY AT THE MOMENT

Overtime

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.



- Dashboards
- Workforce
 - Field Force
 - Web Users
 - Contractors**
 - Work Groups
- Work Orders
- Task Scheduling
- Inventory
- Assets
- Customers
- Catalog
- Settings

Contractors

6650

Start typing to search...

Contractors

5 Records

Add New

| Company | Contact Person | City | State | Country | Contact Phone |
|------------------|----------------|-------------|------------|---------------|---------------|
| ABC Contractor | Jim Sweeny | Singapore | Singapore | Singapore | +658887777 |
| 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 | +917777777190 |

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

ABC Contractor

Description (Optional)

Contractor operating in the North and East regions

Contact Information

Contact Name

Jim Sweeny

Contact Title

Owner

Contact Email

jim.sweeny@abc.com

Contact Phone

+65 8888-7777

Location Information

Address

Changi Business Park Central 1, Singapore

City

Singapore

State (Optional)

Singapore

Postal Code

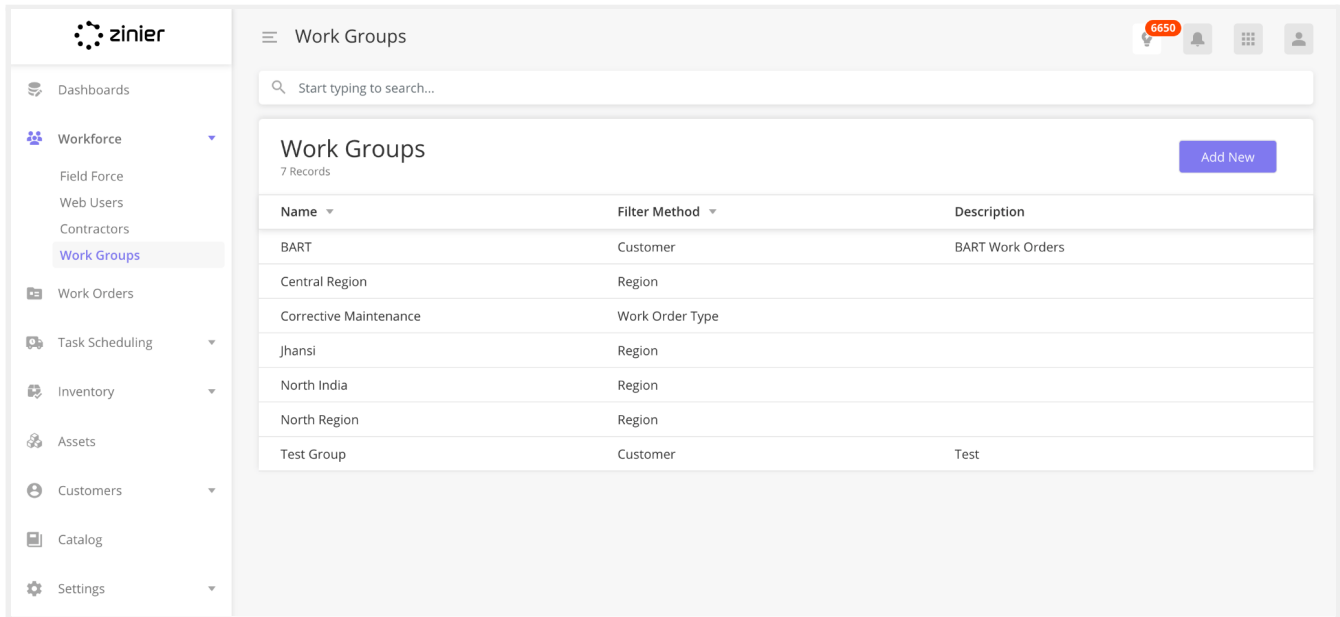
486041

Country

Singapore

Work Groups

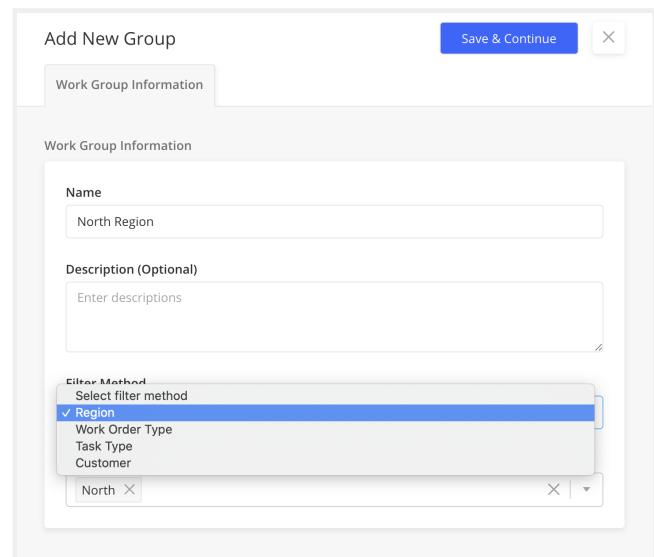
Create Work Groups in order to filter Tasks and Technicians so dispatchers can focus only on their area of responsibility.



| 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

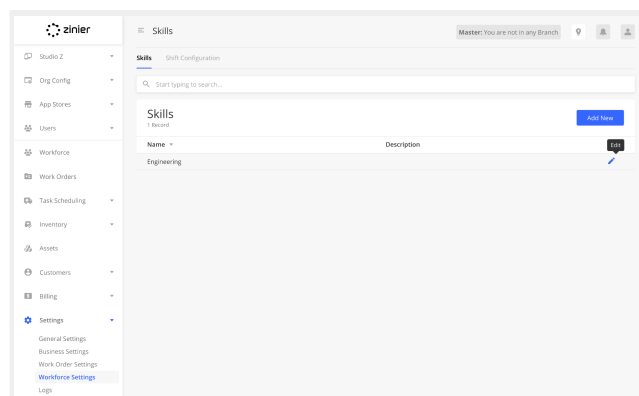
- If a user belongs to multiple groups of different filter methods (example: one Region work group and one Task Type work group), an "and" operator is applied so they see a filtered list of tasks and technicians based on both of those filters.
- Example: I belong to a work group for Region: North and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

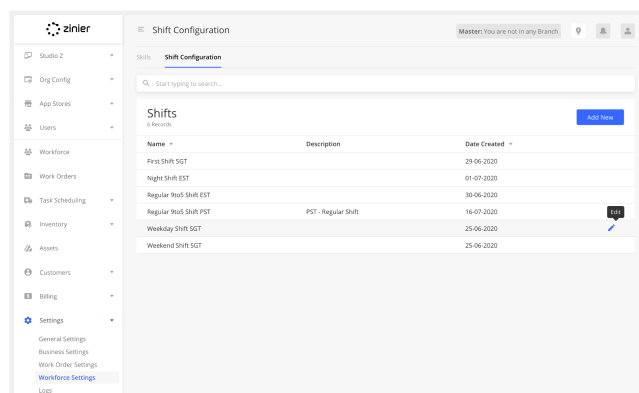
Manage Skills & Skill Levels - Define a master list of Skills and Skill Levels. Once defined, these can be assigned to Technicians (and Task Types) and used by the Tech Recommendation / Auto Scheduler.

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



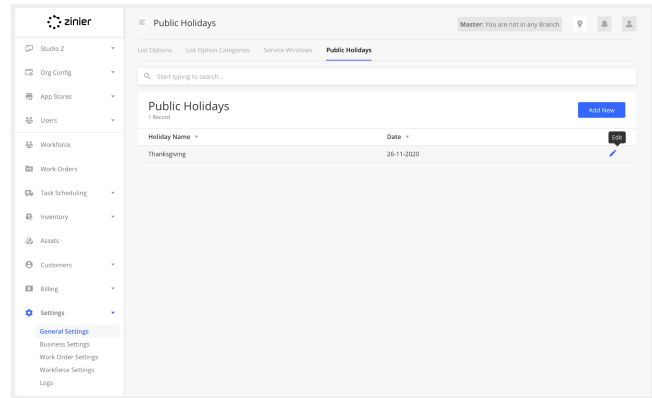
Manage Shifts - Define (add and edit) a master list of Shift Configurations. Shifts define the weekly schedule and public holidays for a technician and are used to determine the availability of a technician when scheduling and dispatching. Once defined, Shifts can be assigned to Technicians.

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



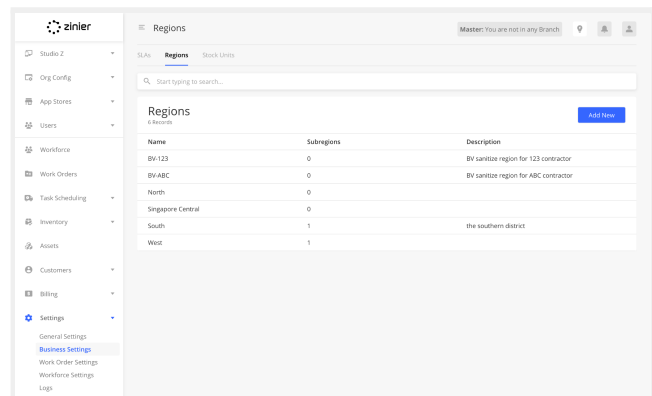
Public Holidays

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

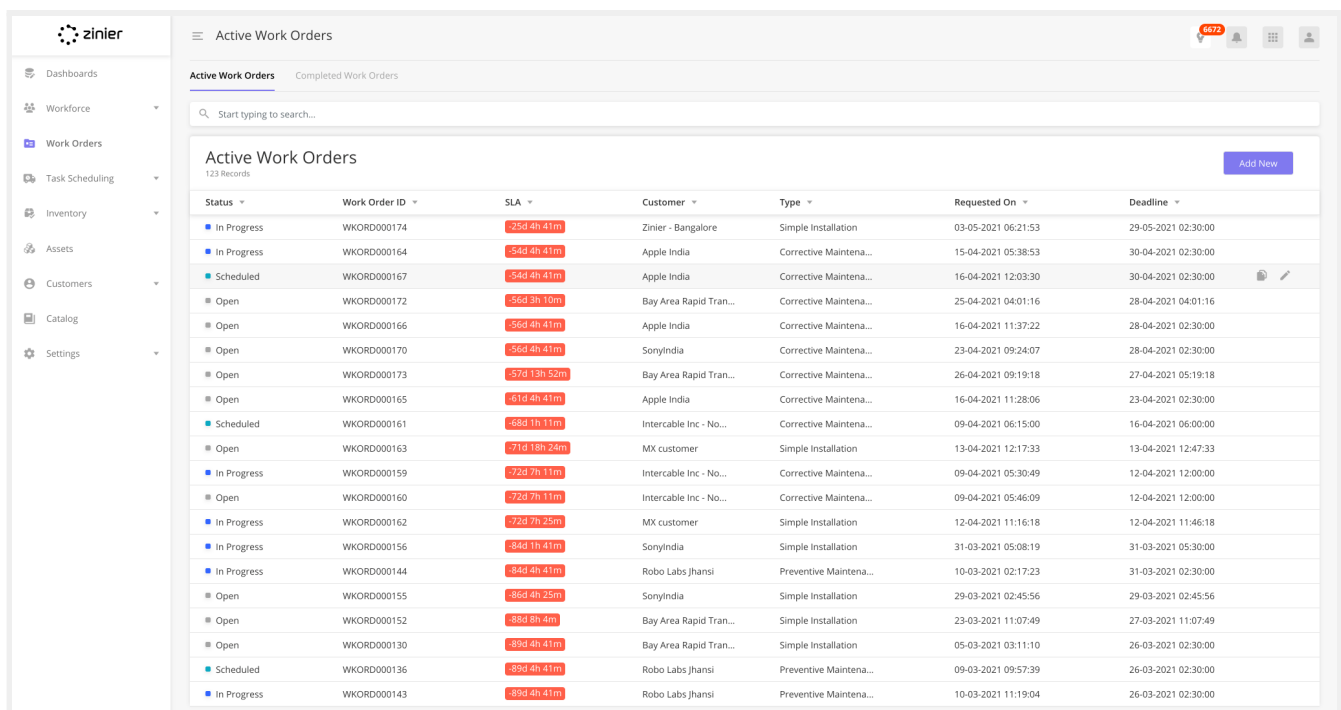
Define (add and edit) a master list of Regions / Sub-regions. Regions are (optionally) used as part of the matching criteria when assigning a Technician to a Task at a Customer Site. When the Tech Recommendation attempts to match a Technician with a Task, it will check to see if the Region of the Customer 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 Zinier Work Order Management interface. On the left is a sidebar with navigation options: Dashboards, Workforce, Work Orders (selected), Task Scheduling, Inventory, Assets, Customers, Catalog, and Settings. The main content area is titled 'Active Work Orders' and shows a list of 123 records. The table columns are: Status, Work Order ID, SLA, Customer, Type, Requested On, and Deadline. The table lists various work orders with their respective statuses (In Progress, Scheduled, Open), IDs, SLAs, customers, types, and deadlines.

| 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.

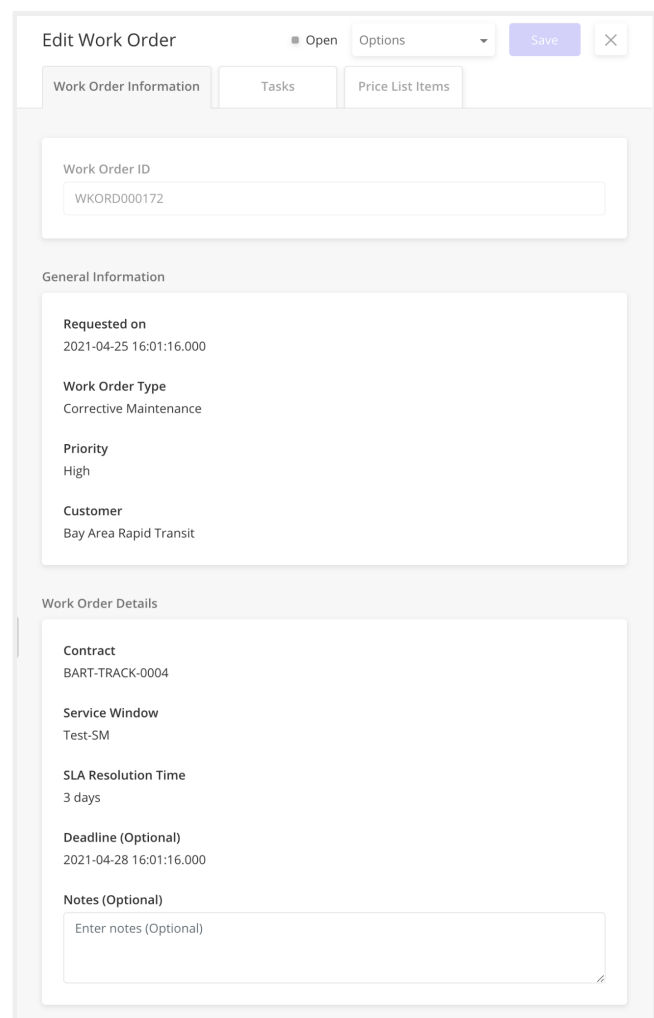
- **Completed** - When all tasks within the Work Order are completed, the Work Order automatically transitions to Completed status. Completed Work Orders may contain one or more tasks that have been canceled, but at least one was completed.
- **Canceled** - This status indicates the Work Order was canceled 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.



Edit Work Order
Open
Options
Save
X

Work Order Information
Tasks
Price List Items

Work Order ID
WKORD000172

General Information

Requested on
2021-04-25 16:01:16.000

Work Order Type
Corrective Maintenance

Priority
High

Customer
Bay Area Rapid Transit

Work Order Details

Contract
BART-TRACK-0004

Service Window
Test-SM

SLA Resolution Time
3 days

Deadline (Optional)
2021-04-28 16:01:16.000

Notes (Optional)
Enter notes (Optional)

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

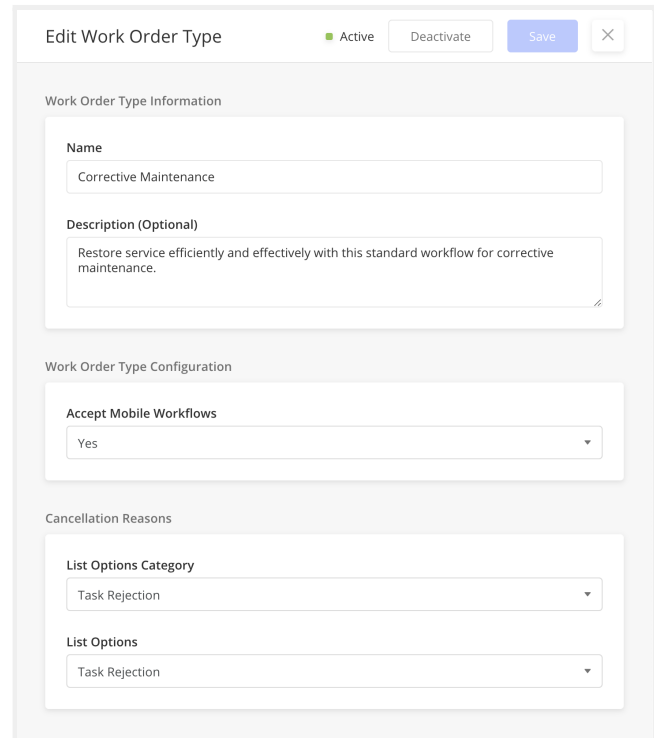
Work Orders Settings are managed in a few different modules in FSE.

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

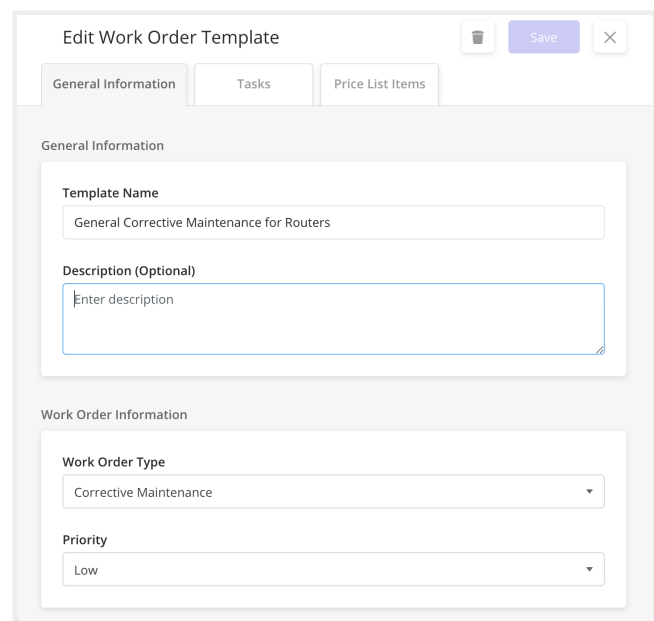
comes with 3 pre-configured Work Order Types associated with the Standard Mobile Workflows that come out of the box: Corrective Maintenance, Preventive Maintenance, and Simple Installation. For more information, view the Standard Mobile Workflows section.



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

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 |  |
| 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

Weekdays

Description (Optional)

Enter description

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

🔍

Start typing to search...

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

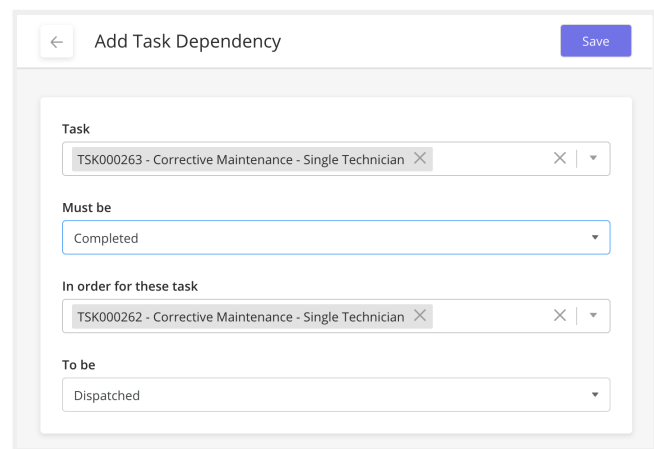
use Services (Services: Enabled / Disabled) and if Services are Enabled, they must define the list of default Services on the Task Type.

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.



Studio Z

Org Config

App Stores

Users

Workforce

Work Orders

Task Scheduling

Inventory

Assets

Customers

Billing

Settings

General Settings
 Business Settings
 Work Order Settings
 Workforce Settings
 Logs

Task Types

Master: You are not in any Branch

Work Order Types

Work Order Templates

Task Types

Scheduling Settings

Start typing to search...

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.

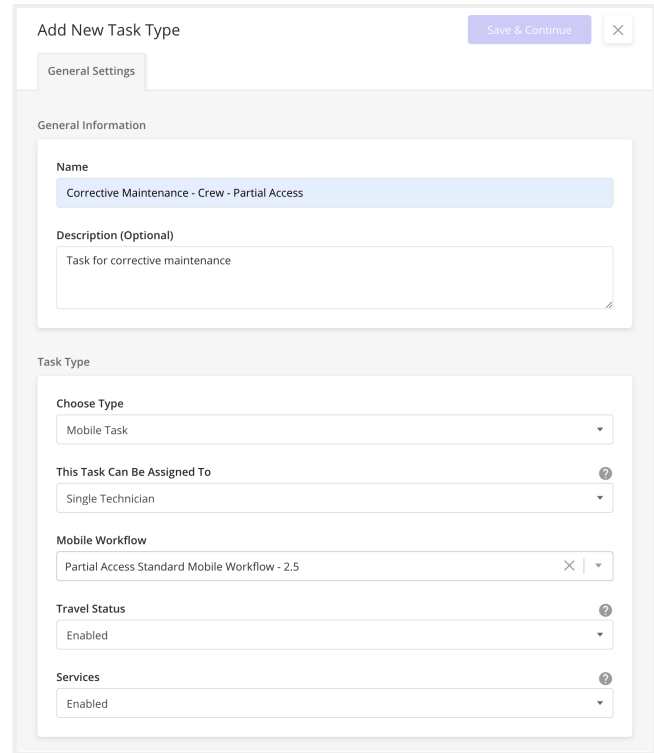
Define Mobile Workflows for a Task Type -

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 -

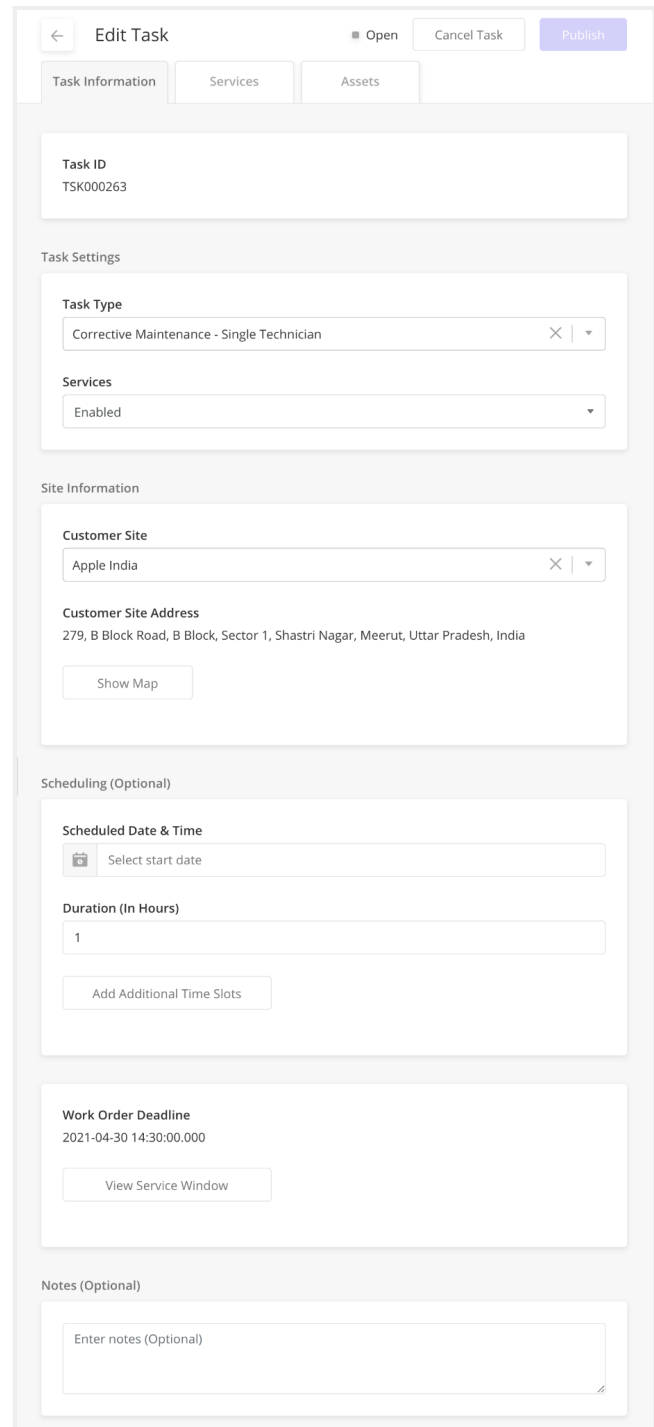
Define which Results Sidepanel the Task Type will display. The Results Sidepanel dictates how the results stored in the Results Model are displayed when a task is submitted for approval and corresponds to the Web Page that was built for that specific Mobile Workflow. The Results Sidepanel page must first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

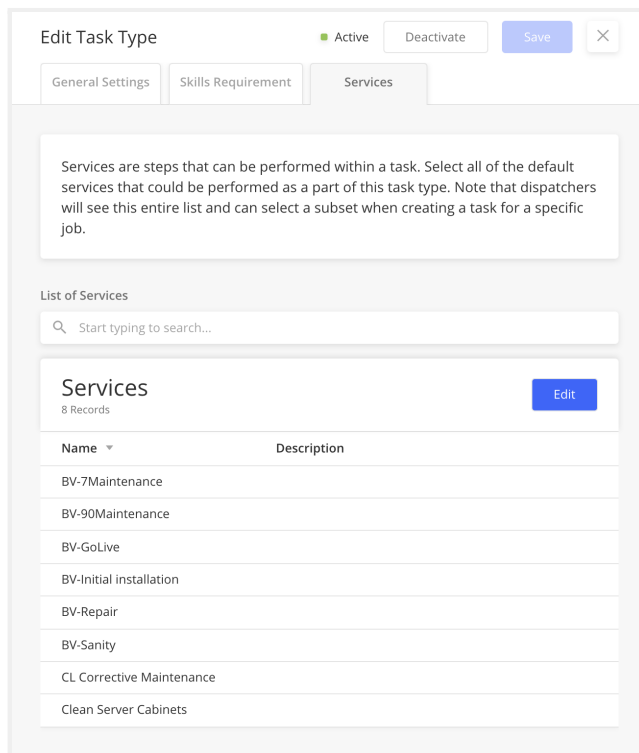
View Service Window

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...

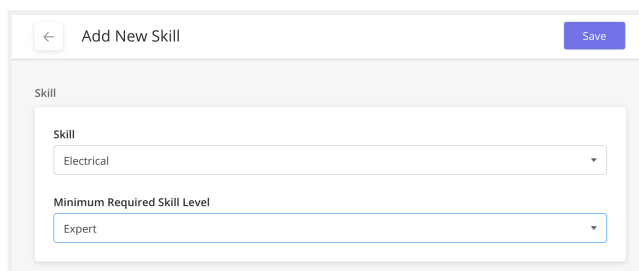
Services Edit

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.

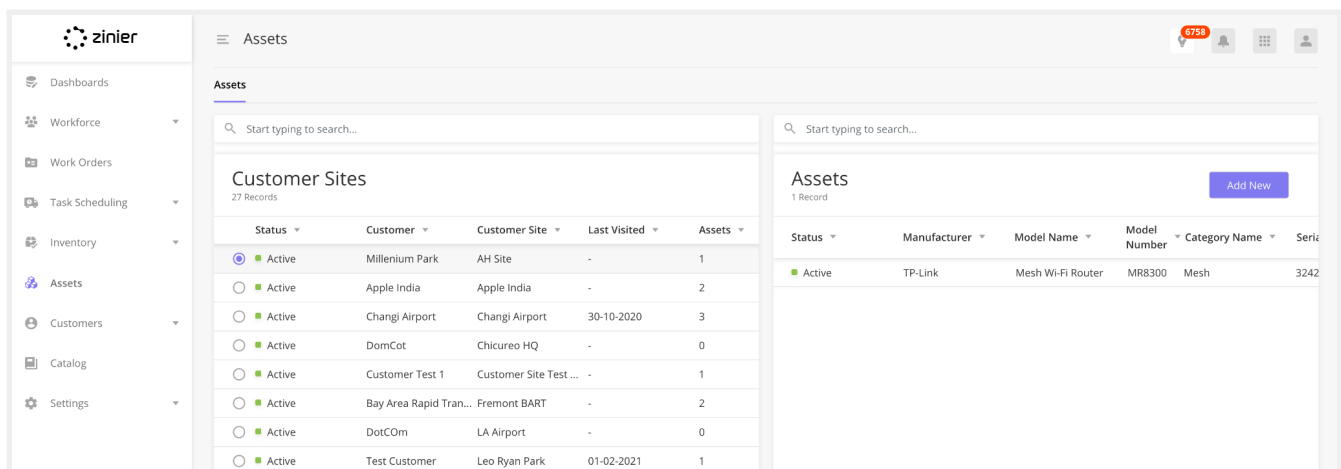
The Inventory module tracks Parts and Materials used in Work Orders and the Stock Location and quantities of inventory at each location.

Assets (Updated V2.11)

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

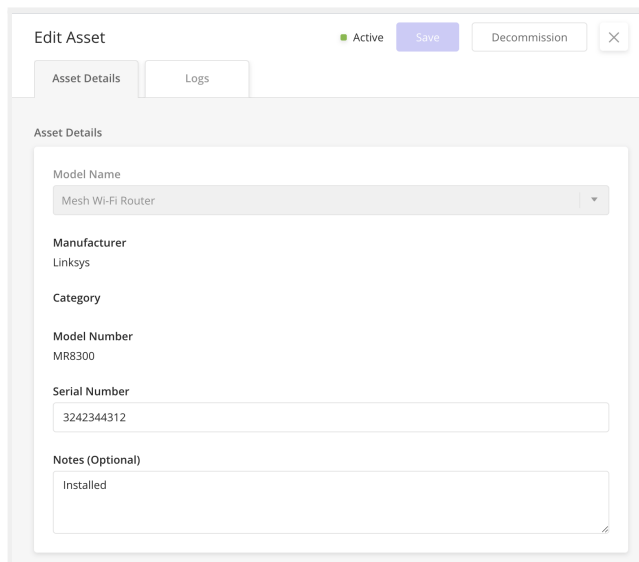
| Status | Customer | Customer Site | Last Visited | Assets |
|--------|------------------------|------------------------|--------------|--------|
| Active | Millenium Park | AH Site | - | 1 |
| Active | Apple India | Apple India | - | 2 |
| Active | Changi Airport | Changi Airport | 30-10-2020 | 3 |
| 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

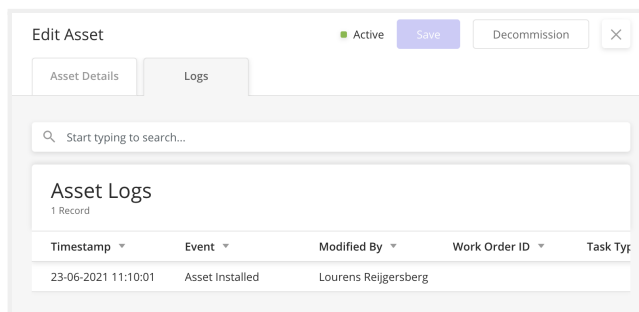
Model Number
MR8300

Serial Number
3242344312

Notes (Optional)
Installed

Asset Logs (Updated 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

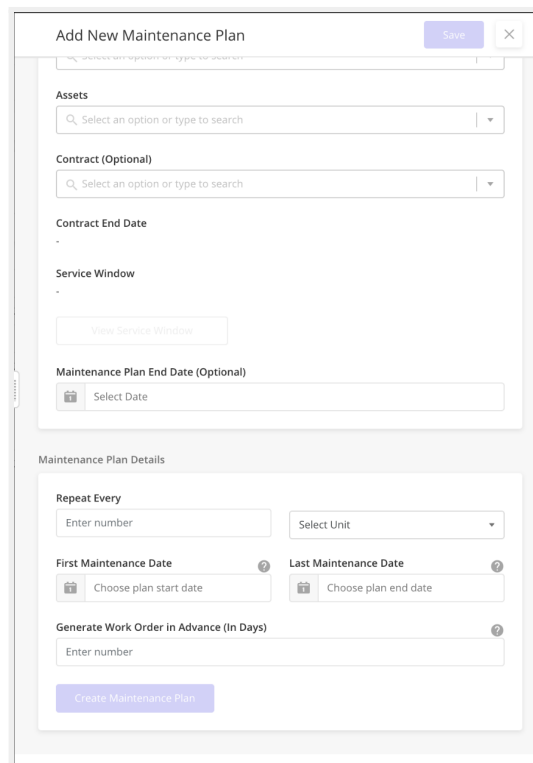
| Timestamp | Event | Modified By | Work Order ID | Task Typ |
|---------------------|-----------------|----------------------|---------------|----------|
| 23-06-2021 11:10:01 | Asset Installed | Lourens Reijgersberg | | |

The Logs capture the following events:

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

Asset Scheduled Maintenance (Updated V2.11)

Asset maintenance at regular intervals is a common use case in field services. These are planned maintenance activities that happen at a specific frequency to improve asset life and proactively address any potential issues. This feature makes it easy for the web user to create maintenance schedules in order to automate the process of generating the work orders. Maintenance plans are associated with asset(s) and optionally associated with contracts.



The screenshot shows a web form titled "Add New Maintenance Plan" with a "Save" button and a close "X" button. The form is divided into two main sections: "Assets" and "Maintenance Plan Details".

Assets Section:

- Assets:** A search bar with the placeholder text "Select an option or type to search".
- Contract (Optional):** A search bar with the placeholder text "Select an option or type to search".
- Contract End Date:** A date selection field.
- Service Window:** A section with a "View Service Window" button.
- Maintenance Plan End Date (Optional):** A date selection field with a calendar icon and the text "Select Date".

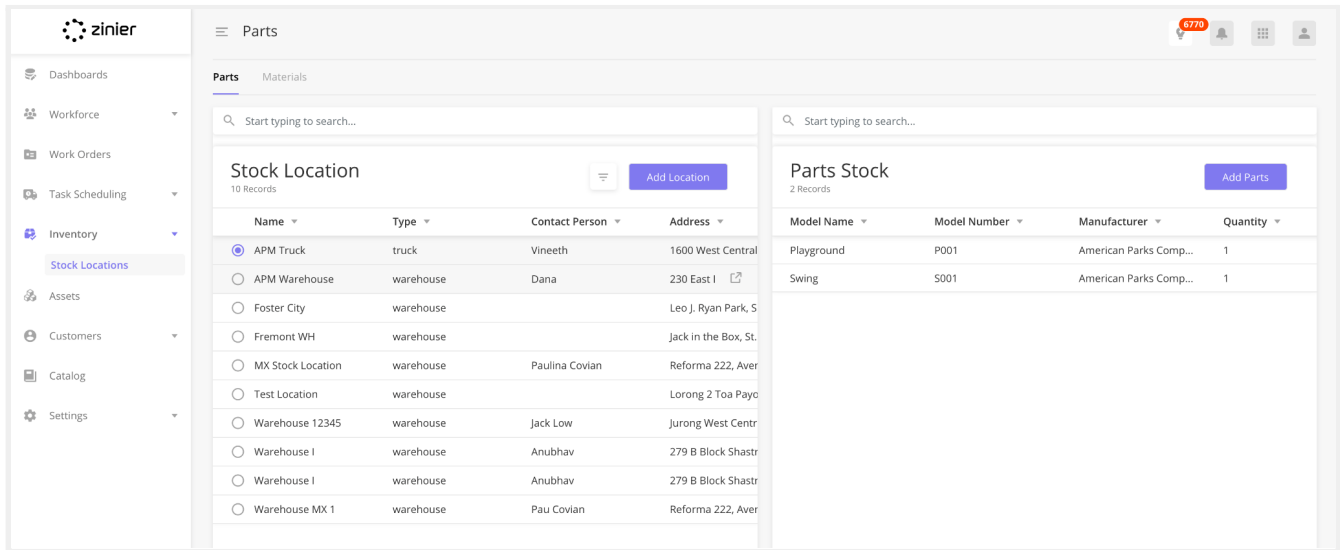
Maintenance Plan Details Section:

- Repeat Every:** A text input field labeled "Enter number" and a dropdown menu labeled "Select Unit".
- First Maintenance Date:** A date selection field with a calendar icon and the text "Choose plan start date".
- Last Maintenance Date:** A date selection field with a calendar icon and the text "Choose plan end date".
- Generate Work Order in Advance (In Days):** A text input field labeled "Enter number".
- Create Maintenance Plan:** A blue button at the bottom of the form.

Stock Locations

Stock Locations 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 shows the Zinier application interface. On the left is a sidebar with navigation options: Dashboards, Workforce, Work Orders, Task Scheduling, Inventory (selected), Assets, Customers, Catalog, and Settings. The main content area is titled 'Parts' and has two tabs: 'Parts' and 'Materials'. The 'Parts' tab is active, showing two tables: 'Stock Location' and 'Parts Stock'.

Stock Location Table (10 Records):

| 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 |

Parts Stock Table (2 Records):

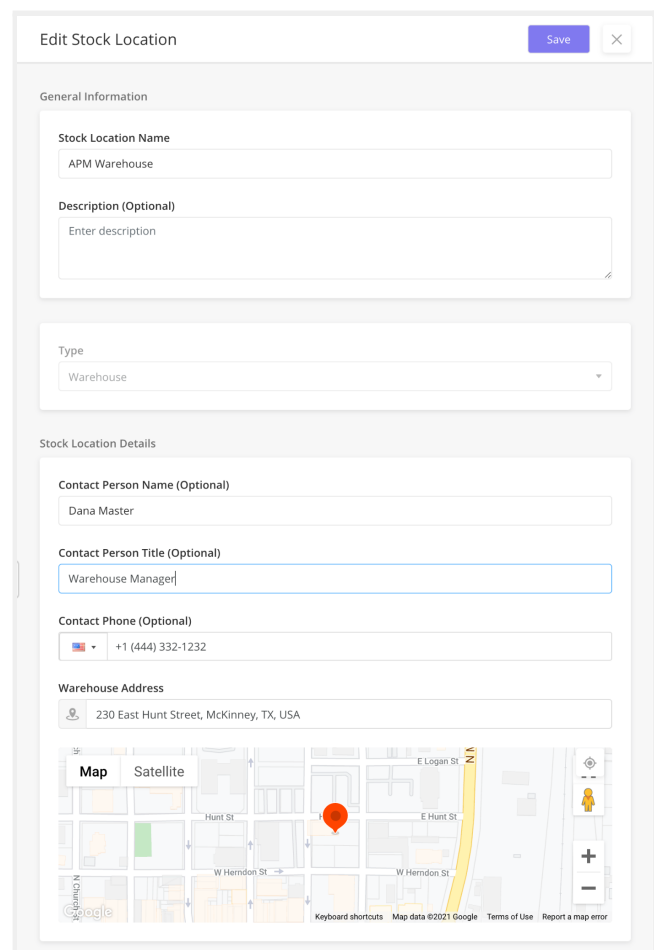
| Model Name | Model Number | Manufacturer | Quantity |
|------------|--------------|------------------------|----------|
| Playground | P001 | American Parks Comp... | 1 |
| Swing | S001 | American Parks Comp... | 1 |

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.



The screenshot shows the 'Edit Stock Location' form. It has a 'Save' button and a close button (X). The form is divided into sections: 'General Information' and 'Stock Location Details'.

General Information:

- Stock Location Name:** APM Warehouse
- Description (Optional):** Enter description
- Type:** Warehouse

Stock Location Details:

- Contact Person Name (Optional):** Dana Master
- Contact Person Title (Optional):** Warehouse Manager
- Contact Phone (Optional):** +1 (444) 332-1232
- Warehouse Address:** 230 East Hunt Street, McKinney, TX, USA

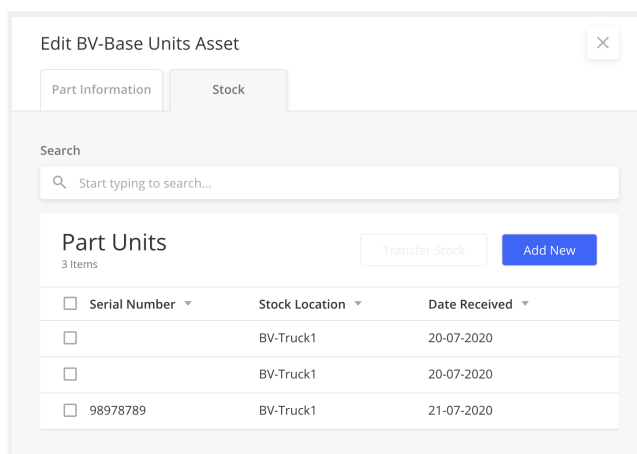
At the bottom of the form is a map showing the location of the warehouse. The map includes a street view and a red pin indicating the location. The map is titled 'Map' and 'Satellite'.

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).



Edit BV-Base Units Asset

Part Information | **Stock**

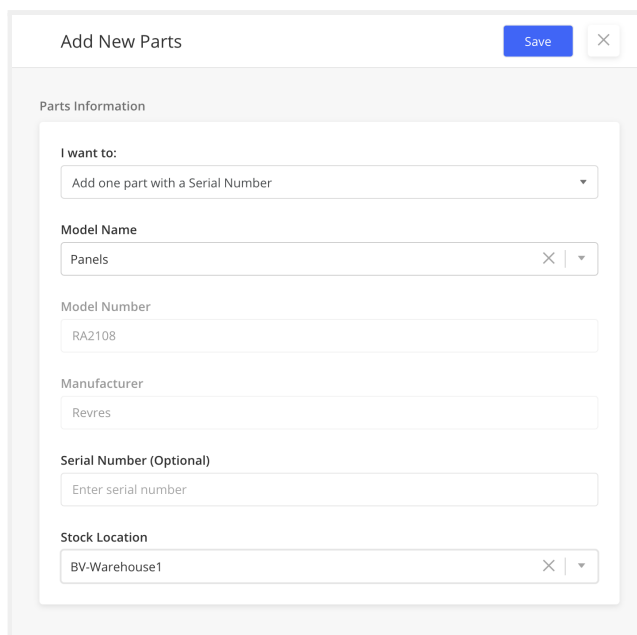
Search
Start typing to search...

Part Units
3 Items

Transfer Stock | Add New

| <input type="checkbox"/> 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.



Add New Parts | Save | X

Parts Information

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
X

Model Number
RA2108

Manufacturer
Revres

Stock Location
BV-Warehouse1
X

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
X

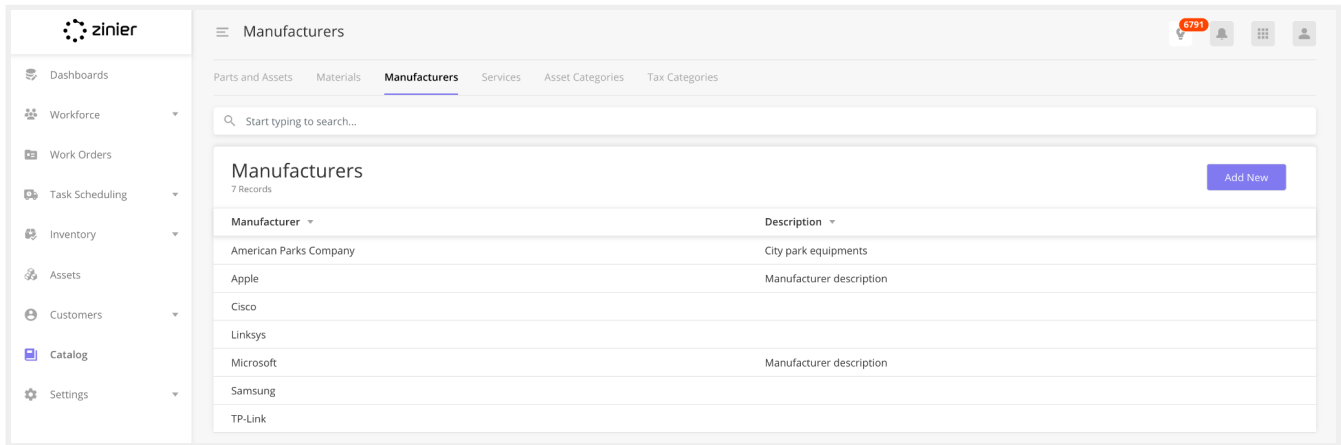
Summary

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 displays the 'Manufacturers' section of the Zinier application. The left sidebar contains navigation links: Dashboards, Workforce, Work Orders, Task Scheduling, Inventory, Assets, Customers, Catalog, and Settings. The main content area is titled 'Manufacturers' and shows 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.

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.

Save

×

Edit Catalog Item

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

Q 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.

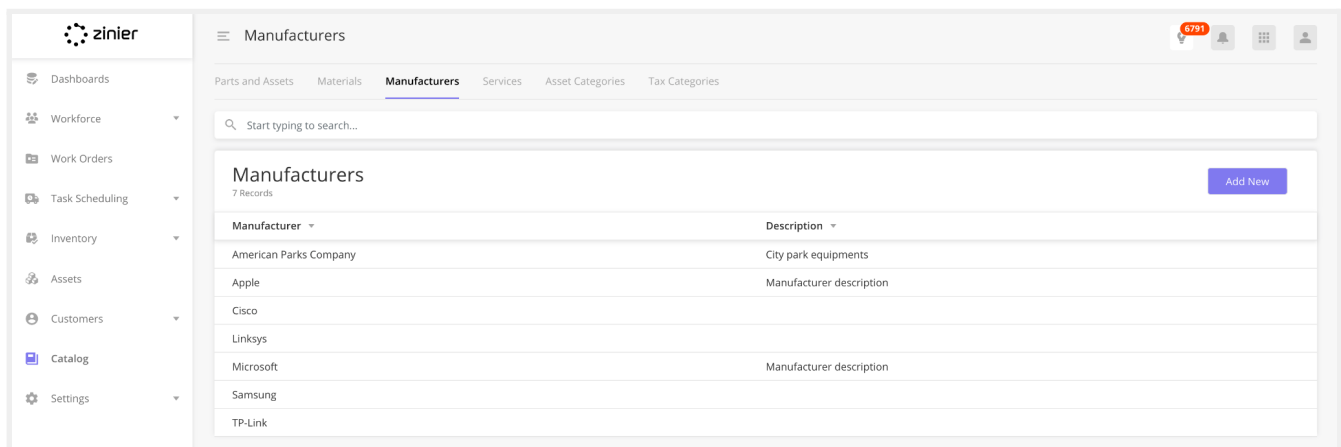
In order to assign a Tax Rate, it must first be created from the Tax Categories module. For more information, see the Tax Categories section below.

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.



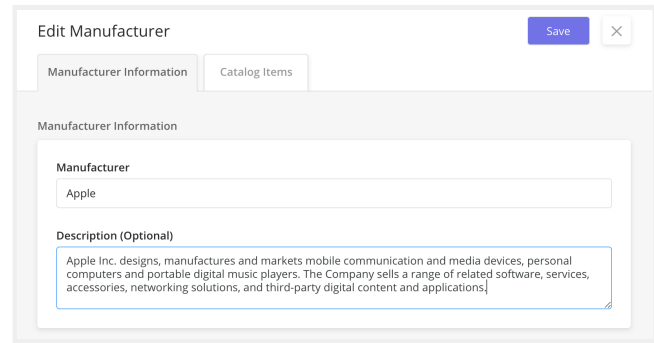
The screenshot shows the Zinier web application interface. On the left is a sidebar menu with options: Dashboards, Workforce, Work Orders, Task Scheduling, Inventory, Assets, Customers, Catalog, and Settings. The main content area is titled 'Manufacturers' and includes a search bar with the placeholder text 'Start typing to search...'. Below the search bar is a table with 7 records. The table has two columns: 'Manufacturer' and 'Description'. The records listed are: American Parks Company (City park equipments), Apple (Manufacturer description), Cisco, Linksys, Microsoft (Manufacturer description), Samsung, and TP-Link.

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

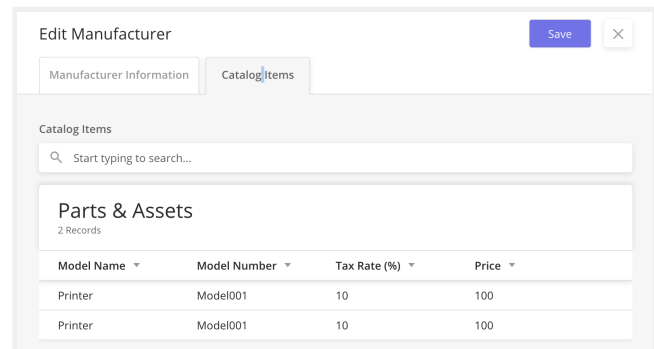
Manage Manufacturers Catalog

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.



The screenshot shows the 'Edit Manufacturer' form with the 'Manufacturer Information' tab selected. The 'Manufacturer' field contains 'Apple'. The 'Description (Optional)' field contains a detailed description of Apple Inc. The 'Save' button is visible in the top right corner.

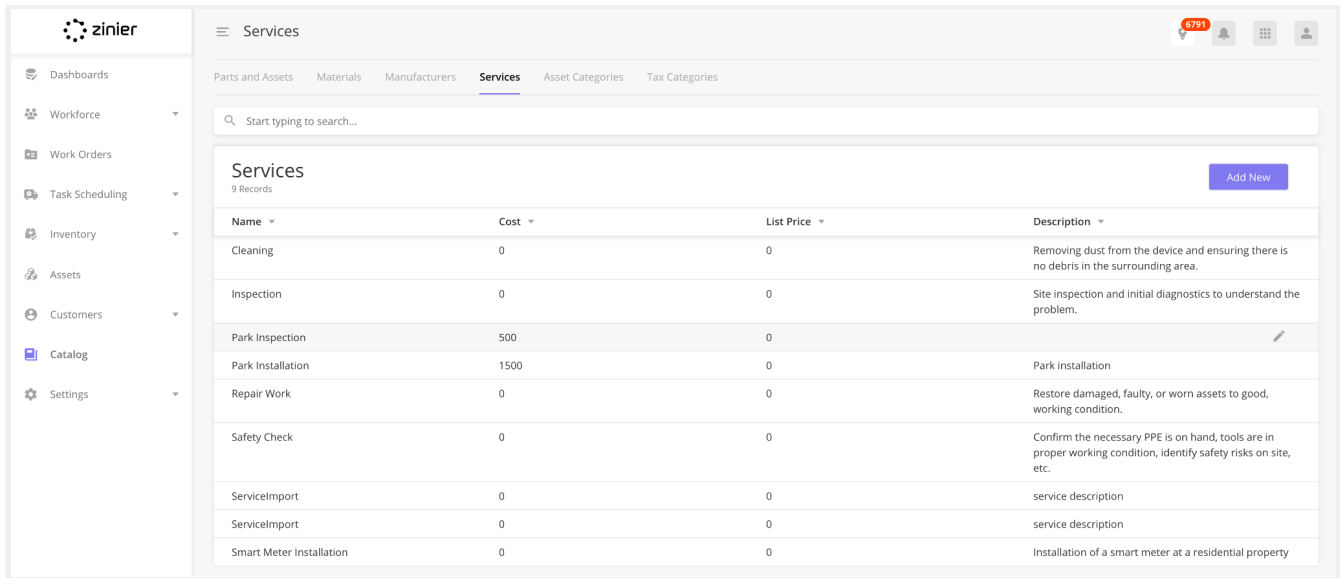


The screenshot shows the 'Edit Manufacturer' form with the 'Catalog Items' tab selected. A search bar is present with the placeholder text 'Start typing to search...'. Below the search bar, the 'Parts & Assets' section displays a table with 2 records.

| 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.



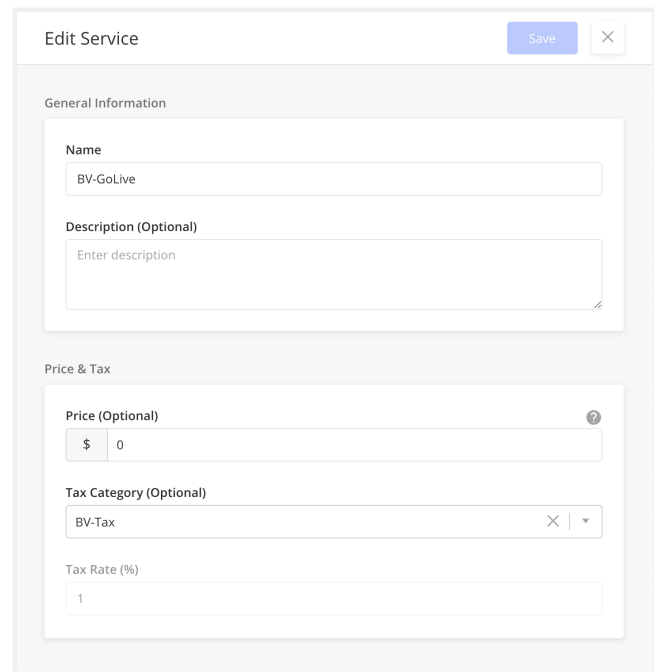
| Name | Cost | List Price | Description |
|--------------------------|------|------------|--|
| Cleaning | 0 | 0 | Removing dust from the device and ensuring there is no debris in the surrounding area. |
| Inspection | 0 | 0 | Site inspection and initial diagnostics to understand the problem. |
| Park 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.



Edit Service
Save
X

General Information

Name
BV-GoLive

Description (Optional)
Enter description

Price & Tax

Price (Optional)
\$ 0

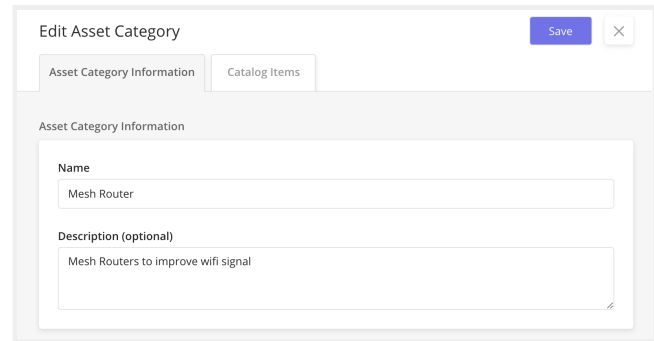
Tax Category (Optional)
BV-Tax
X

Tax Rate (%)
1

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

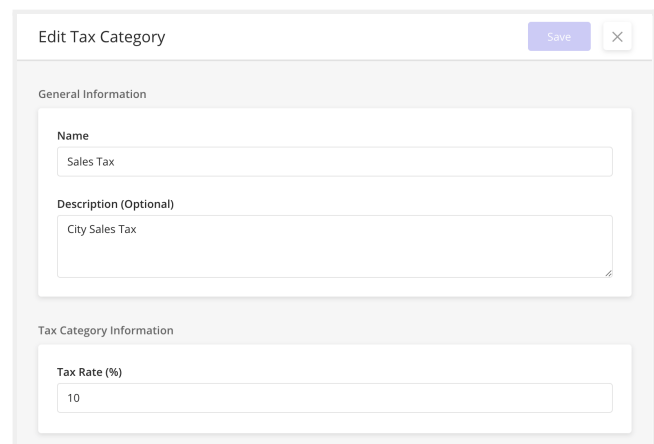
Create a catalog of categories to better group Parts and Assets. Define the categories here and then they can be optionally added to each item in the Parts and Assets catalog, and are viewable on the individual assets themselves.



The 'Edit Asset Category' form has a title bar with a 'Save' button and a close icon. It contains two tabs: 'Asset Category Information' (active) and 'Catalog Items'. The 'Asset Category Information' section includes a 'Name' field with the value 'Mesh Router' and a 'Description (optional)' field with the value 'Mesh Routers to improve wifi signal'.

Tax Categories

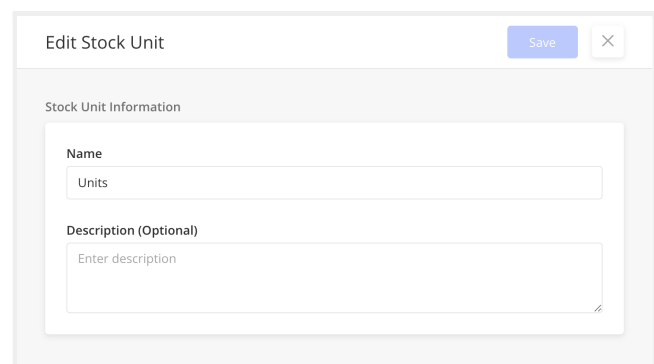
Manage (add and edit) your catalog of Tax Categories. A record must be added here before the item can be assigned to a Part, Asset, Material, or Service. Tax Categories allow you to define specific Tax Rates for items in your catalog to assist when billing and invoicing customers or connecting to external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



The 'Edit Tax Category' form has a title bar with a 'Save' button and a close icon. It contains two sections: 'General Information' and 'Tax Category Information'. The 'General Information' section includes a 'Name' field with the value 'Sales Tax' and a 'Description (Optional)' field with the value 'City Sales Tax'. The 'Tax Category Information' section includes a 'Tax Rate (%)' field with the value '10'.

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.




The 'Edit Stock Unit' form has a title bar with a 'Save' button and a close icon. It contains a 'Stock Unit Information' section with a 'Name' field containing 'Units' and a 'Description (Optional)' field with the placeholder text 'Enter description'.

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.



- Dashboards
- Workforce
- Projects
- Work Orders
- Task Scheduling
- Inventory
- Assets
- Customers**
 - Customers
 - Sites
 - Segments
 - Contracts
- Catalog
- Settings
- Demo

Customers

Start typing to search...

Customers

41 Records

Add New CSV Import

| 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 JL 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

AIA

Description (Optional)

Enter description

Location Information

Address

5 Ang Mo Kio Street 62, Singapore

City

Singapore

State

Western

Postal Code

370066

Country

Singapore

Contact Information

Contact Person Name

Shirelene Teo

Contact Person Title (Optional)

GM

Contact Phone

+65


93591953

Contact Email (Optional)

prabanath2003@gmail.com

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.



- Dashboards
- Workforce
- Projects
- Work Orders
- Task Scheduling
- Inventory
- Assets
- Customers
 - Customers
 - Sites
 - Segments
 - Contracts
- Catalog
- Settings
- Demo

Customer Sites

Customer Sites

Start typing to search...

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 | Corrandon 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.

Active

Deactivate

Save

×

Edit Customer Site

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

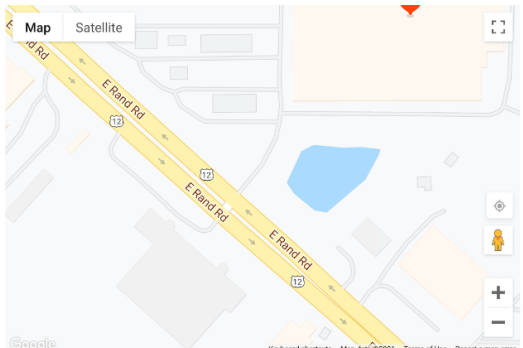
Contact Email

Enter email

Site Location

Map

Satellite



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.

Save

×

Region Information

Name

Central

Description (Optional)

Enter description

Subregions

Start typing to search...

Subregions

0 Record

Add New

YOUR LIST IS EMPTY AT THE MOMENT

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Page 103

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.

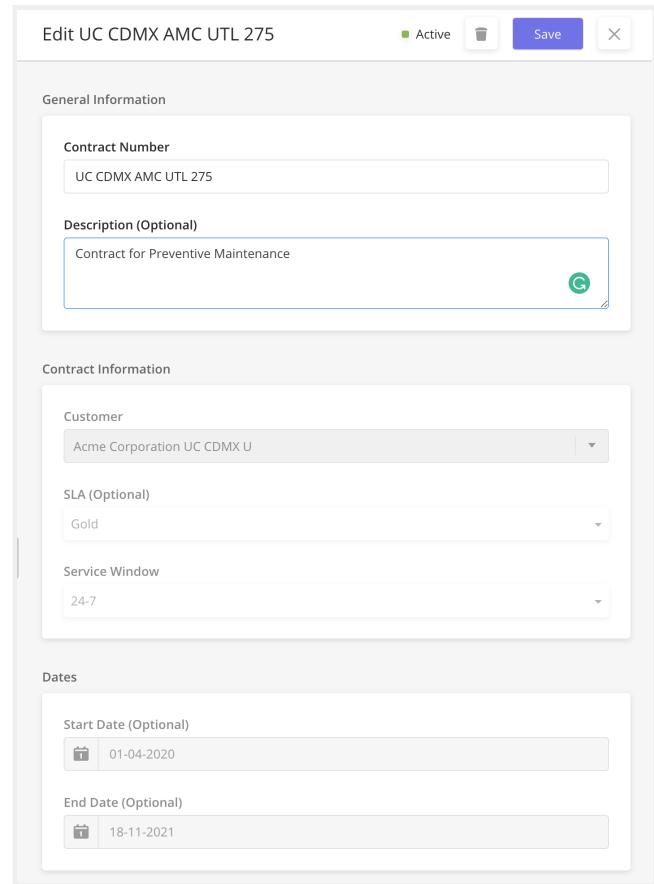
SLAs must first be added in Settings / Business Settings. Once added, an SLA can be assigned to a Contract.

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 X

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 |  |
| 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

Weekdays

Description (Optional)

Enter description

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

Start typing to search...

Public Holidays

0 Record

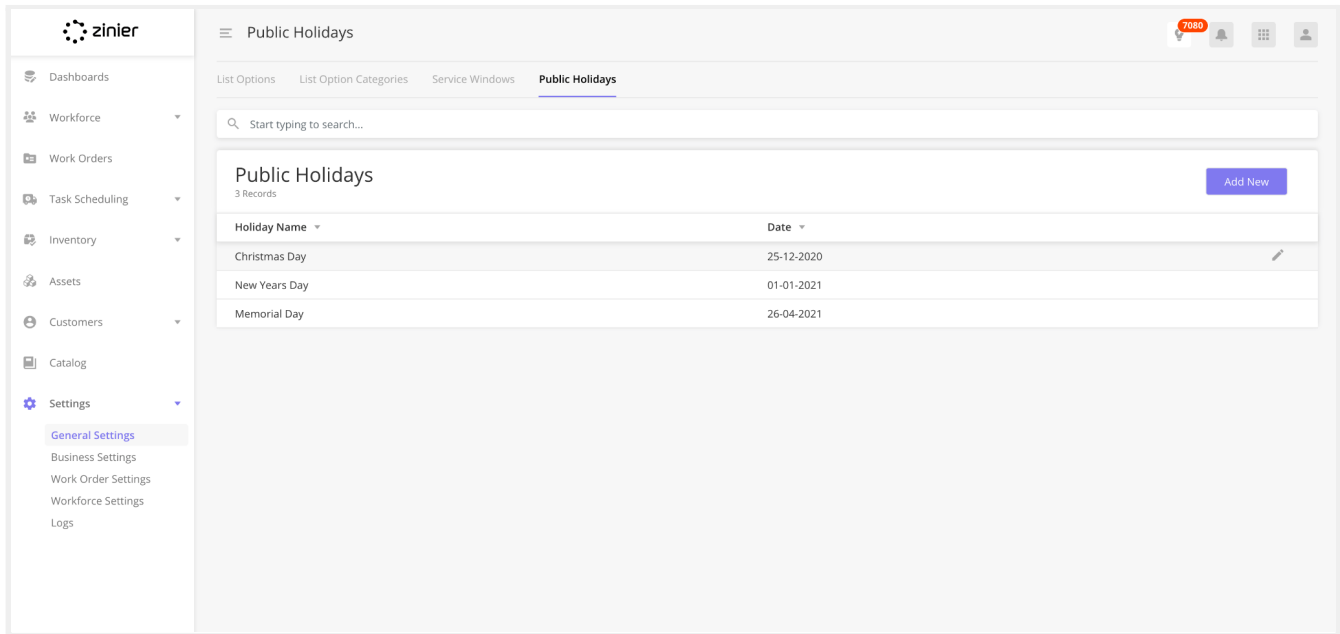
Add New

🔍

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 Holidays

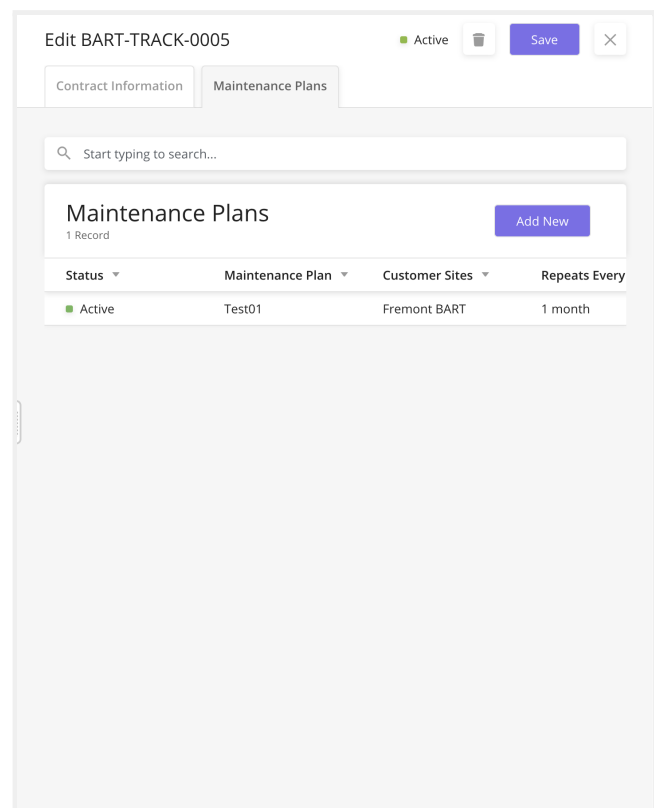
3 Records

[Add New](#)

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

Manage Maintenance plans

Maintenance plans can be added to assets. Create and edit maintenance plans for asset(s) that are associated with a customer and a customer site .



Edit BART-TRACK-0005 Active [Save](#) [X](#)

[Contract Information](#) [Maintenance Plans](#)

[Start typing to search...](#)

Maintenance Plans

1 Record

[Add New](#)

| Status | Maintenance Plan | Customer Sites | Repeats Every |
|--------|------------------|----------------|---------------|
| Active | Test01 | Fremont BART | 1 month |

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*

FSE Dashboards

| Dashboard | Type | Description | Filter |
|--------------------------------|-------------------|---|--|
| Technician Utilization | Bar chart | During the last 30 days, how much time (using tasks) was allocated for each technician every day compared to the available time for the shift. | Last 30 days |
| SLA Compliance Rate | Line Chart | From the completed work orders in the last 30 days, show the percentage of Work Orders completed within SLA compliance. | Last 30 days |
| Task Completion Rate | Stacked Bar Chart | Total percentage of completed tasks as a portion of all tasks scheduled for the day. | Last 7 days Last 30 days Last 90 days |
| Work Order Statuses | Pie Chart | Number of work orders per OOB Status by created date. | Today Last 7 days Last 30 days Last 90 days |
| Tasks By Status | Pie Chart | Number of tasks per status by created date. | Today Last 7 days Last 30 days Last 90 days |
| Mean Time to Resolution (MTTR) | Line Chart | The time difference between Work Order Requested Date & Time and Work Order completed Date & Time, per WO Type. | Last 7 days Last 30 days Last 90 days |
| First Time Fixed Rate (FTFR) | Line Chart | Percentage of the tasks that have been reopened at least once vs the ones that were submitted by the technician only once (completed) and were scheduled for the same | Last 30 days |

| | | | |
|-----------------------|-----------|---|-----|
| | | day. | |
| Technician Efficiency | Data Grid | Shows how efficient a technician is in completing tasks compared to the allocated time in hours. Displays historical data by technician-date. | N/A |

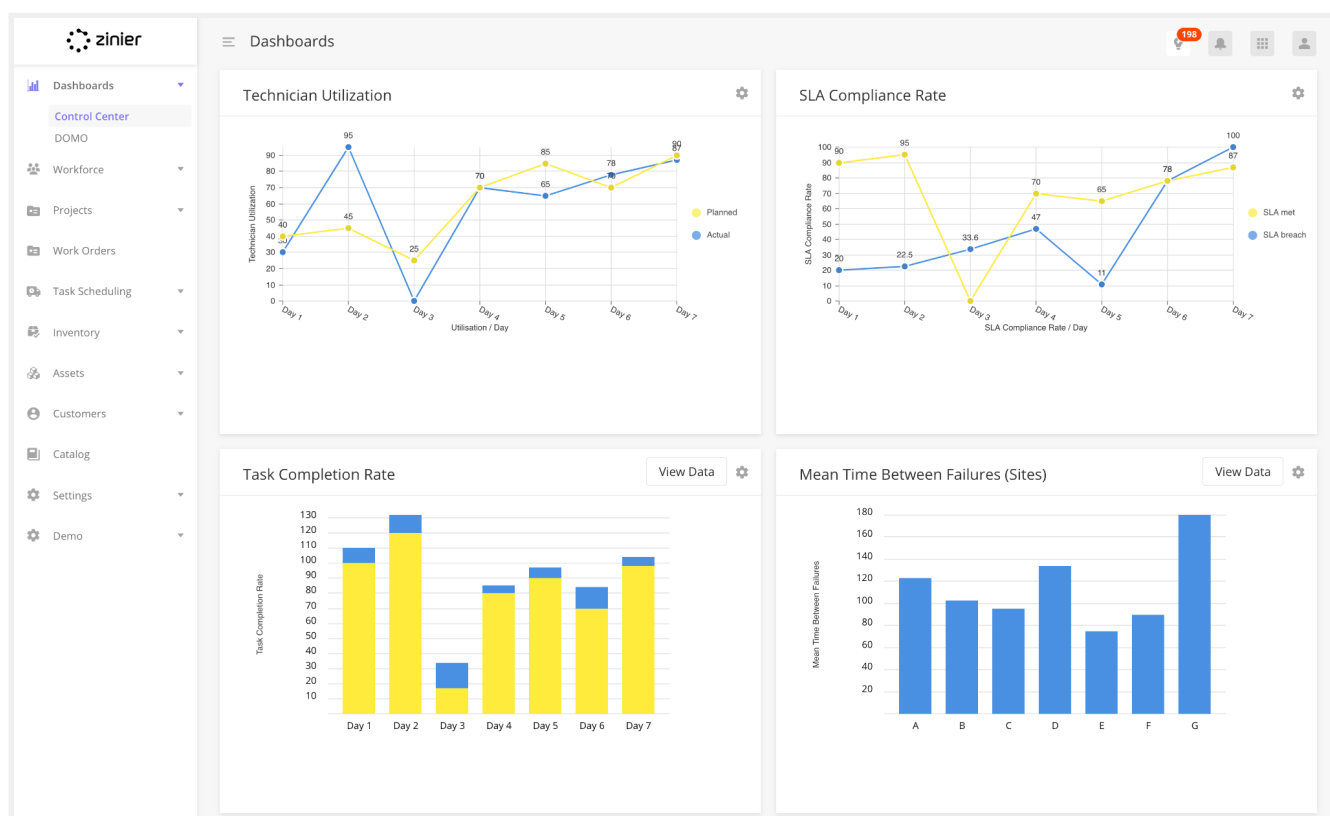
Zinier Dashboards

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 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

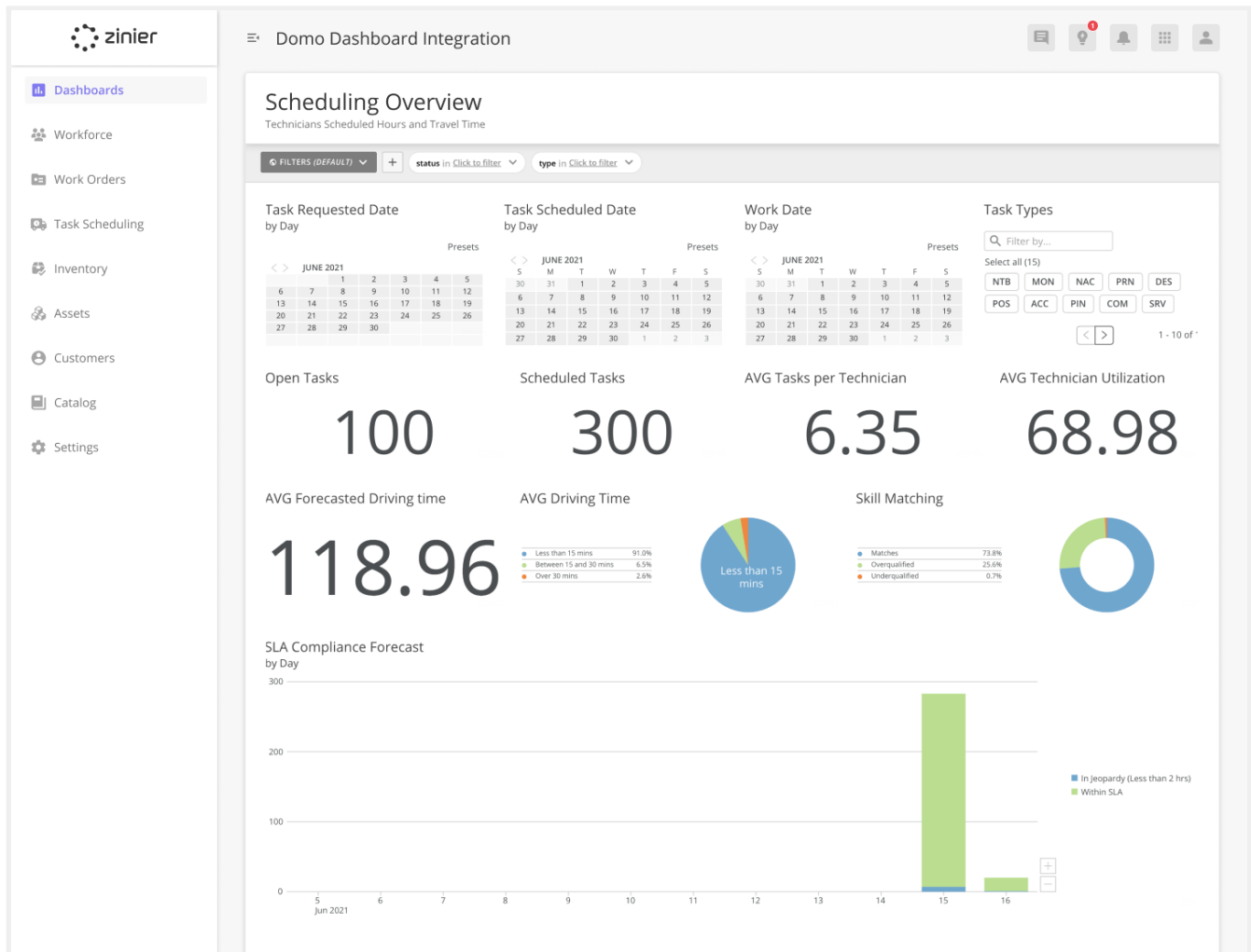
Some of our clients require advanced BI capabilities to be able to analyze the data that come from the Zinier platform to use it internally for reporting. Domo is an add-on to the standard Zinier product and will have to be purchased separately, please contact your account executive for more details.

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 is an add-on to the standard Zinier product and will have to be purchased separately, please contact your account executive for more details.*