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OZ FMS Administrator Guide

OZ FMS (Facility Management Service) is a mobile workforce job dispatch & management solution for companies which provide field services such as equipment installation, preventive maintenance or repair services.

This guide aims to be a comprehensive guide to the website of OZ FMS service for administrator.

Overview

OZ FMS (Facility Management Service) is a mobile workforce job dispatch & management solution for companies which provide field services such as equipment installation, preventive maintenance or repair services. OZ FMS effectively utilize engineers, considerably improve service performance and consequently, helps to increase revenue. This OZ FMS cloud service is optimized for small to medium sized service companies.

Why OZ FMS?

Key features

Service workflow

Why OZ FMS?

With OZ FMS, service companies will be enabled to do:

- Automatic repeated M/A job scheduling by MA contract information
- · Ad-hoc job scheduling
- Assigning technician(s) to a job
- Company resources (customers, technicians, etc.) management
- Real-time job & technician tracking
- Mobile service report creation & maintaining
- Capturing proof of service (photo, customer signature, technician signature, service date-time)
- On-line submission of mobile service report to the back office

Renefits

- Keep track of job status and technician location in real-time
- Effective utilization of technicians and time
- · Save paper related costs
- No loss or damage of service reports
- Improve customer royalty and renewal rate
- Technician looks more professional
- · No need to hire IT staffs

Advantages

- Mobile service report includes billing information as well as work description
- Send mobile service report to the server and customer as soon as submitting the job
- Automatic input of price value by selecting a repair part from the part list
- Automatic calculation of total price including parts, labor and tax (no human error)
- Company can define and use its own checklist for equipment
- Job status dashboard and useful KPI reports

Key features

Resource management with web portal

- User management: Add/Edit/Delete user account
- Customer management: Import/Add/Edit/Delete customer information
- Contract management: Import/Add/Edit/Delete contract information
- Parts management: Import/Add/Edit/Delete repair parts information
- Checklist management: Import/Add/Edit/Delete checklist
- Dashboard : Insightful graphical dashboard provides real time job status and performance monitoring
- Reports: valuable reports such as contract renewal list, revenue report will help CEO to make better business decision making
- · Customer visit history:
- Customer contract history:

Scheduling and dispatching with web portal

- Intuitive calendar based Scheduling & Dispatcher: Calendar (Timeline, weekly and monthly) and Job List provides real time job monitoring and highly efficient control of job processing
- Create ad-hoc job from customer call and schedule on the calendar form the job list by drag & drop operation
- Automatic creation and scheduling of recursive jobs by M/A contracts

Field service work with mobile App

- Job list for the login technician
- Select a job and check-in
- · Complete service forms and checklist
- Automatic billing calculation of repair parts, labor and GST
- · Take photos of site
- Take signatures of technician and customer
- Submit and send e-service report to office and customer immediately
- Temporary saving of service form input data on the mobile device enables to restore input data when mobile network came back online. Technician don't need to type in data again.
- Push notification of work order change to the technician
- Support iOS (7.0 or later) and Android (4.0 or later) devices

Service workflow

Administrator

1. Sign Up

Create company account and ADMIN user at FMS portal.

2. Add Users

Add technician information such as name, email, mobile number, password, etc.

3. Add Products

Add popular brands and model names of customer products.

4. Add Parts

Add spare part name information such as brand, model, etc. This spare part list does not keep actual stock information. It will be used just for select list on the mobile service form.

5. Add Checklist

Add your equipment checklist such as categories and items, etc.

6. Add Ad-hoc jobs

Add job for on-demand service request from customer call. This is not the case of M/A contract jobs.

7. Add Customers (and Contracts)

Add customer information such as name, contact, address, etc. You can also add contract information together when bulk uploading customers.

8. Add Contracts & M/A jobs

Add preventive maintenance contract information such as customer, products, contract period, visit interval, price, etc. Once contracts have been added, M/A jobs to visit during contract period will be automatically created and scheduled.

9. Scheduling & Dispatch

With calendar based scheduler, ADMIN can change visit date & time, assign (Dispatch) technician(s) to a job. ADMIN can also set repeated visit schedule for M/A contract jobs.

10. Tracking job status

With Calendar, Job List, and Map View, ADMIN can keep track of processing status of all jobs in real time.

Technician

1. Install mobile App

Download and install FMS mobile App from Google Play or Apple App store.

2. Log in to App

Log in with technician's email account and password. And then job list will be shown.

3. Check-in for job

Select a job and check-in to start the job and then open the service report.

4. Complete service report forms

Fill out forms such as Product, Checklist, Parts, and take photos.

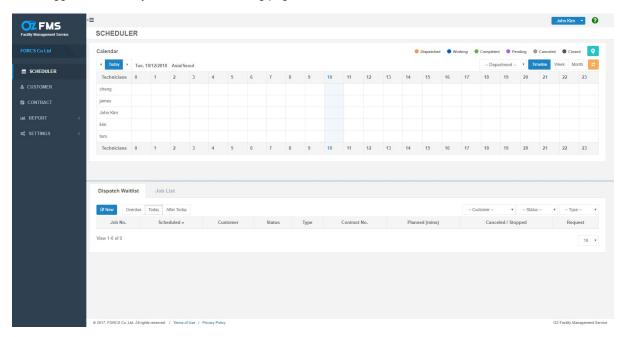
Preview service report & signatures
 Once completed forms, preview service report and take signatures of technician and customer.

6. Submit job

After completing forms and signatures, submit the service report. Service report will be sent to the service portal and customer via email.

Screen layout

Once logged in to FMS, you will see the landing page as illustrated below.



The Minimize/Maximize icon shrink/expand the vertical navigator on the left side. It works as a toggle button. The help icon opens detailed help documents for you to learn how to use this service.