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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

### **Benefits**

- 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 from 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.

5. 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 screenshot displays the OZ FMS Scheduler interface. On the left is a dark sidebar with the OZ FMS logo and navigation links: FORCS Co Ltd, SCHEDULER, CUSTOMER, CONTRACT, REPORT, and SETTINGS. The main area is titled 'SCHEDULER' and features a calendar for 'Tue, 18/12/2018 Asia/Seoul'. The calendar shows a grid for technicians (cheng, james, John Kim, kim, tom) across days 0 to 23, with day 10 highlighted. Below the calendar is a 'Dispatch Waitlist' section with tabs for 'Now', 'Overdue', 'Today', and 'After Today'. The 'Now' tab is active, showing a table with columns: Job No., Scheduled, Customer, Status, Type, Contract No., Planned (mins), Canceled / Stopped, and Request. The table is currently empty, showing 'View 1-0 of 0'. At the bottom, there is a footer with copyright information and a help icon.

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.