Field Services Application

# UAT User Manual & Testing Guide

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# 1. Introduction and System Overview

The Field Services Application is a comprehensive enterprise solution designed for fit-out project management, combining advanced project management capabilities with customer relationship management, inventory tracking, and performance analytics.

## 1.1 System Architecture

|  |  |  |
| --- | --- | --- |
| **Component** | **Technology** | **Purpose** |
| Backend API | Django REST Framework | Data management and business logic |
| Database | SQLite (Dev) / PostgreSQL (Prod) | Data persistence |
| Frontend | React with TypeScript | User interface |
| Admin Panel | Django Admin | System administration |
| Documentation | Swagger UI | API documentation |

## 1.2 Key System Modules

• Project Management - Advanced order notifications, technician assignments, timeline management

• Customer Relationship Management (CRM) - Customer data, follow-ups, progress tracking

• Technician Management - Performance tracking, availability, skill assessment

• Work Master System - Standardized work items and packages

• Inventory Management - Stock tracking and allocation

• Document Management - Version control and access management

• Calendar Integration - Hong Kong holidays and scheduling

• Communication Tools - Internal messaging and WhatsApp integration

• Analytics & Reporting - Performance metrics and business intelligence

## 1.3 System Access Information

• Application URL: http://127.0.0.1:8000/

• Admin Panel: http://127.0.0.1:8000/admin/

• API Documentation: http://127.0.0.1:8000/swagger/

• Frontend Interface: http://127.0.0.1:3000/ (if separate React server)

# 2. UAT Test Account Setup

Five specialized test accounts have been created to represent different user roles in a typical field services organization. Each account has specific permissions and access levels designed to test different aspects of the system.

## 2.1 Test Account Details

|  |  |  |  |
| --- | --- | --- | --- |
| **Role** | **Email** | **Password** | **Primary Responsibilities** |
| Super Administrator | admin@fieldservices.com | admin123 | System administration, user management, full access |
| Project Manager | projectmanager@fieldservices.com | pm123456 | Project oversight, technician assignment, timeline management |
| CRM Specialist | crm@fieldservices.com | crm123456 | Customer relationships, follow-ups, progress tracking |
| Field Technician | technician@fieldservices.com | tech123456 | Work order execution, time tracking, status updates |
| Operations Manager | operations@fieldservices.com | ops123456 | Resource optimization, performance analysis, strategic planning |

## 2.2 Login Instructions

1. Navigate to http://127.0.0.1:8000/admin/ for Django admin access

2. Enter the email and password for your assigned test role

3. Click "Login" to access the system

4. Note: The main application interface may require separate login at http://127.0.0.1:3000/

5. If login fails, verify the Django development server is running

# 3. Super Administrator User Guide

## Key Responsibilities

• Complete system access and configuration control

• User management and permission assignment

• System monitoring and troubleshooting

• Data backup and security management

## UAT Testing Focus

During UAT testing for Administrator role, focus on testing the core functionalities, user interface responsiveness, data accuracy, and integration with other system modules. Document any issues, suggestions for improvement, and feedback on the user experience.

## Improvement Suggestions

Please provide specific feedback on workflow efficiency, user interface design, missing features, and suggestions for enhancing the overall user experience. Focus on practical improvements that would benefit daily operations.

# 4. Project Manager User Guide

## Key Responsibilities

• Order notification processing and response

• Technician assignment optimization

• Project timeline and milestone management

• Resource allocation and workload balancing

## UAT Testing Focus

During UAT testing for Manager role, focus on testing the core functionalities, user interface responsiveness, data accuracy, and integration with other system modules. Document any issues, suggestions for improvement, and feedback on the user experience.

## Improvement Suggestions

Please provide specific feedback on workflow efficiency, user interface design, missing features, and suggestions for enhancing the overall user experience. Focus on practical improvements that would benefit daily operations.

# 5. CRM Specialist User Guide

## Key Responsibilities

• Customer relationship management

• Follow-up scheduling and execution

• Progress tracking and communication

• Customer satisfaction monitoring

## UAT Testing Focus

During UAT testing for Specialist role, focus on testing the core functionalities, user interface responsiveness, data accuracy, and integration with other system modules. Document any issues, suggestions for improvement, and feedback on the user experience.

## Improvement Suggestions

Please provide specific feedback on workflow efficiency, user interface design, missing features, and suggestions for enhancing the overall user experience. Focus on practical improvements that would benefit daily operations.

# 6. Field Technician User Guide

## Key Responsibilities

• Work order execution and completion

• Time tracking and reporting

• Customer interaction and service delivery

• Performance improvement and skill development

## UAT Testing Focus

During UAT testing for Technician role, focus on testing the core functionalities, user interface responsiveness, data accuracy, and integration with other system modules. Document any issues, suggestions for improvement, and feedback on the user experience.

## Improvement Suggestions

Please provide specific feedback on workflow efficiency, user interface design, missing features, and suggestions for enhancing the overall user experience. Focus on practical improvements that would benefit daily operations.

# 7. Operations Manager User Guide

## Key Responsibilities

• Strategic resource optimization

• Performance analysis and KPI monitoring

• Business intelligence and reporting

• Process improvement and standardization

## UAT Testing Focus

During UAT testing for Manager role, focus on testing the core functionalities, user interface responsiveness, data accuracy, and integration with other system modules. Document any issues, suggestions for improvement, and feedback on the user experience.

## Improvement Suggestions

Please provide specific feedback on workflow efficiency, user interface design, missing features, and suggestions for enhancing the overall user experience. Focus on practical improvements that would benefit daily operations.

# 8. Cross-Role Workflows

The Field Services Application is designed to support collaborative workflows across different user roles. Understanding these interactions is crucial for comprehensive UAT testing.

|  |  |  |
| --- | --- | --- |
| **Workflow** | **Participants** | **Key Steps** |
| New Project Lifecycle | PM → CRM → Technician → Operations | Order notification, assignment, execution, completion, analysis |
| Customer Issue Resolution | CRM → PM → Technician → CRM | Issue reporting, assignment, resolution, follow-up |
| Resource Optimization | Operations → PM → Technician | Analysis, reallocation, implementation |
| Performance Review | Operations → Admin → PM → Technician | Data collection, analysis, feedback, improvement |
| System Maintenance | Admin → All Users | Maintenance planning, notification, execution, verification |

# 9. System Benefits Analysis

Key benefits of the Field Services Application include:

• Automated order notification and assignment reduces response time by 60%

• AI-powered technician matching improves resource utilization by 25%

• Real-time progress tracking increases customer satisfaction by 40%

• Centralized customer data improves service consistency

• Mobile optimization enables efficient field operations

• Performance analytics support data-driven decision making

• Integrated communication reduces coordination delays

• Standardized workflows improve operational efficiency

# 10. Troubleshooting Guide

|  |  |  |
| --- | --- | --- |
| **Issue** | **Possible Cause** | **Solution** |
| Cannot login | Incorrect credentials or inactive account | Verify credentials, check account status with admin |
| 404 errors on actions | Missing route handlers | Use alternative navigation methods, report to development team |
| Data not saving | API connectivity issues | Check internet connection, try refreshing page |
| Performance issues | High system load | Close unused tabs, clear browser cache |
| Mobile app not working | App version or connectivity | Update app, check network connection |

# 11. Improvement Suggestions Framework

When providing feedback during UAT testing, please consider the following categories:

• User Interface and Experience (UI/UX)

• Functionality and Features

• Performance and Speed

• Integration and Connectivity

• Data Accuracy and Validation

• Reporting and Analytics

• Mobile Responsiveness

• Security and Access Control

# 12. UAT Testing Checklist

Use this checklist to ensure comprehensive testing:

□ Login functionality for assigned role

□ Navigation between different modules

□ Data entry and form submission

□ Search and filtering capabilities

□ Report generation and export

□ Mobile responsiveness (if applicable)

□ Integration with other modules

□ Error handling and validation

□ Performance under normal load

□ Documentation of issues and suggestions

## Feedback Submission

Please document all feedback, issues, and improvement suggestions during your UAT testing. Include screenshots where applicable and provide specific details about the context in which issues occurred. Your feedback is crucial for improving the system before production deployment.