

# AME Field Service Management Software

*An overview of the important project functionalities*

## General Application Role Groups:

- Customer
- Admin
- Superadmin/Management
- Accounts/HR
- Technician

Each role group will have its own set of permissions (outlined below). A user can be assigned to multiple groups, and will inherit the permissions of all groups they're assigned to.

### Customer

- Customer can register with email address and login with email and password
- Customer can review details of previous & upcoming services, including:
  - Technician Assigned (not shown for upcoming services)
  - Date, Time & Address
  - Service Level
  - Attached Estimates & Invoices
  - Recommendations
  - Images & Attached Documents
  - Machine Details
  - Payment Details
- Customer can request a service
- Customer can receive link to sign job card, once technician sets status to closed

### Admin

#### *CRM*

- Admin can add new customer
- Admin can generate and edit contract template, and store signed contracts\*
- Admin can create & edit multiple options for Point of Contact, phone number, email address, service location & credit cards\* per customer
- Admin can access customer's equipment information, customer documents, service images & job history easily & succinctly

#### *Scheduling*

- Admin can view service schedule (includes unassigned jobs) by different calendar options (daily, weekly, monthly, yearly) & a map option (showing where

serviceable equipment is on island)

- Admin can drag and drop jobs to assign to technician or adjust a job's scheduled time
- Admin can indicate if service can occur within a certain time window or if the time is specific
- Admin can send text message/call technicians directly from scheduling module
- Admin can select route planning option that recommends most efficient job sequence based on location, job length and site operating hours
- Admin can track technician and assigned vehicle, including a record of the times technician opens and closes their app
- Admin can edit the job's status

#### *Estimates, Invoices & Payment*

- Admin can email estimates, invoices & job confirmations to customers with preset email templates that autofill customer's details
- Admin can link estimates, invoices & jobs to projects
- Admin can confirm or adjust technicians' suggestions to details on job cards
- Admin can track & pull reports on project related labour & drive time
- Admin can create invoices per job or run an invoice for a batch of jobs
- Admin can accept credit card payments using a built in payment gateway
- Admin can receive card, cheque or cash payments against invoices
- Admin can see toggles for displaying attached images, rates, quantities & totals when creating or editing estimates or invoices
- Admin can create and edit referral sources per jobs

#### *Inventory Management*

- Admin can create and edit inventory details
- Admin can receive an inventory order and assign items to multiple warehouses
- Admin can reassign inventory from one warehouse to another
- Admin can assign inventory to a technician

#### *Reporting*

- Admin can pull reports across all Admin areas

### **Superadmin/Management**

- Management can create & edit service modules/templates with expected time, technician requirements for service completion, cost, priority, category, etc.
- Management can create & edit company phone number, location, email address & logo, date & time formats, service module colour assignments and general colour scheme
- Management can create & edit users
- Management can assign & reassign users to Role Groups

- Management can set and edit default customer notifications, including:
  - Technician is on the way (triggered by technician job status)
  - Upcoming service (triggered the day before scheduled service)
- Management can clock in and clock out a technician
- Management can adjust technician clock in and clock out times
- Management has access to all functionalities under all roles

## **Accounts/HR**

- Accounts can calculate payroll based on hourly pay settings
- Accounts can calculate regular & overtime pay on a daily or weekly basis
- Accounts can calculate commission due based on assigned referral sources on job cards
- Accounts can accept credit card payments using a built in payment gateway
- Accounts can receive card, cheque or cash payments against invoices

## **Technician**

- Technician can review details about previous & upcoming services, including:
  - Date, Time & Address
  - Recommendations
  - Machine Details
  - Images & Attached Documents
- Technician can edit and adjust their assigned schedule, if not specified
- Technician can assign inventory to a job card
- Technician can edit their assigned inventory
- Technician can edit details on their assigned job cards
- Technician can take images and assign them to job cards, with the ability to indicate the image is internal or external
- Technician can receive customer signature on their assigned job cards
- Technician can update the job status as completed

## **Phase Breakdown**

### **Phase 1**

Database Creation

Initial roles should be:

- Administrator (with all permissions; can create role groups and assign permissions)
- Technician
- Customer

## **Phase 2**

### **Customer**

- Customer can review details of previous & upcoming services, including:
  - Technician Assigned (not shown for upcoming services)
  - Service Level
  - Date, Time & Address
  - Machine Details & Images
  - Technician Recommendations & Status of Recommendation
- Customer can request a service, or change of service details, such as date and/or time
- Customer can receive link to sign job card, once technician sets status to closed

### **Admin**

#### *CRM*

- Admin can add new customer
- Admin can create & edit multiple options for Point of Contact, phone number, email address, service location per customer
- Admin can access customer's equipment information, customer documents, service images & job history easily & succinctly

#### *Scheduling*

- Admin can view service schedule (includes unassigned jobs) by different calendar options (daily, weekly, monthly, yearly) & a map option (showing where serviceable equipment is on island)
- Admin can indicate if service can occur within a certain time window or if the time is specific
- Admin can drag and drop jobs to assign to technician or adjust a job's scheduled time
- Admin can send text message/call technicians directly from scheduling module
- Admin can select route planning option that recommends most efficient job sequence based on location, job length and site operating hours
- Admin can track technician and assigned vehicle, including a record of the times technician opens and closes their app
- Admin can edit the job's status
- Admin can add generators to groups for batch scheduling regardless of the generator's assigned location or customer

### *General Admin*

- Admin can review technician suggestions for change of customer and/or generator details
- Admin can review history of changes for customer and generator details

## **Technician**

- Technician can review details about previous & upcoming services, including:
  - Date, Time & Address
  - Recommendations
  - Machine Details
  - Images & Attached Documents
- Technician can edit and adjust the order of their assigned schedule, if time for service is not specified
- Technician can assign inventory to a job card
- Technician can edit their assigned inventory
- Technician can submit editing suggestions for details on their assigned job cards
- Technician can take images and assign them to their job cards, with the ability to indicate the image is internal or external
- Technician can receive customer signature on their assigned job cards
- Technician can update their job status as completed

## **Phase 3**

### **Customer**

- Customer can register with email address and login with email and password
- Customer can view estimates sent and their status
- Customer can access a portal with:
  - My Details - Customers can view & make changes to contact information and/or billing information
  - My Service Schedule - Customers can see their upcoming Services & Work Orders and request date/time changes
  - My History - Customers can see a list of all the service reports/work orders in chronological order that they have had, with a sort function for ascending/descending
  - My Current Recommendations - Customer can see a list of outstanding recommendations that were made by the Technician that were listed on the service reports/work orders

## **Admin**

### *Estimates, Invoices & Payment*

- Admin can assign estimates, invoices & job confirmations to customers with preset customer's details
- Admin can link estimates, invoices & jobs to projects
- Admin can confirm or adjust technicians' suggestions to details on job cards
- Admin can track & pull reports on project related labour & drive time
- Admin can create invoices per job or run an invoice for a batch of jobs
- Admin can accept credit card payments using a built in payment gateway
- Admin can receive card, cheque or cash payments against invoices
- Admin can see toggles for displaying attached images, rates, quantities & totals when creating or editing estimates or invoices
- Admin can create and edit referral sources per jobs

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