

Fieldo – User guide



This is a step by step user guide for the FieldO management web page.

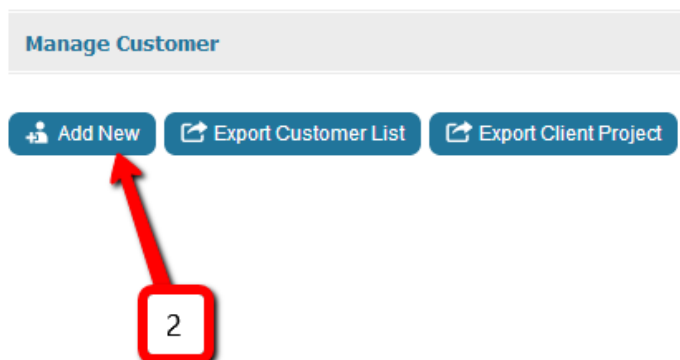
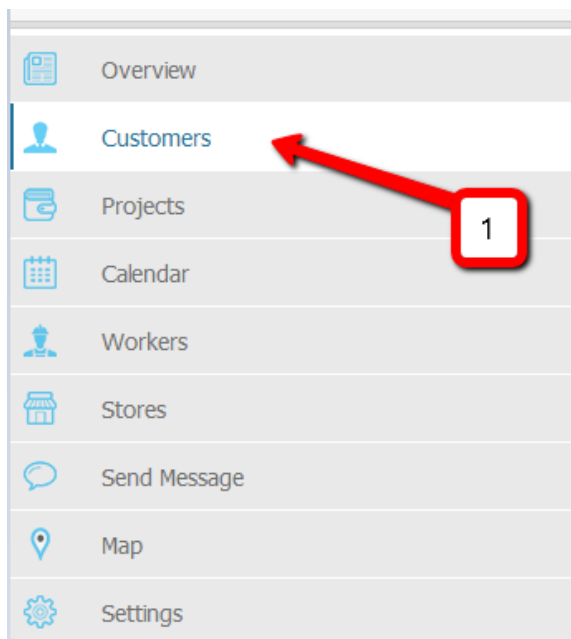
FieldO is not just a work order tool, but also a communication tool. Every task or activity reported in the app is visible for both the project manager and the customer. And every change to a project in the management web page is visible in the app for the worker and the customer.

Before we jump into the guide, it is good to know the key elements of FieldO: Customers, Suppliers, Workers/Employees, and Projects.

Guide

Before you can create a project and assign it to your worker you must create a customer to which the project belongs, and workers to assign the project to. If your project requires materials, it is also good to register a supplier. Therefore, we start with how to add a customer.

Add a customer



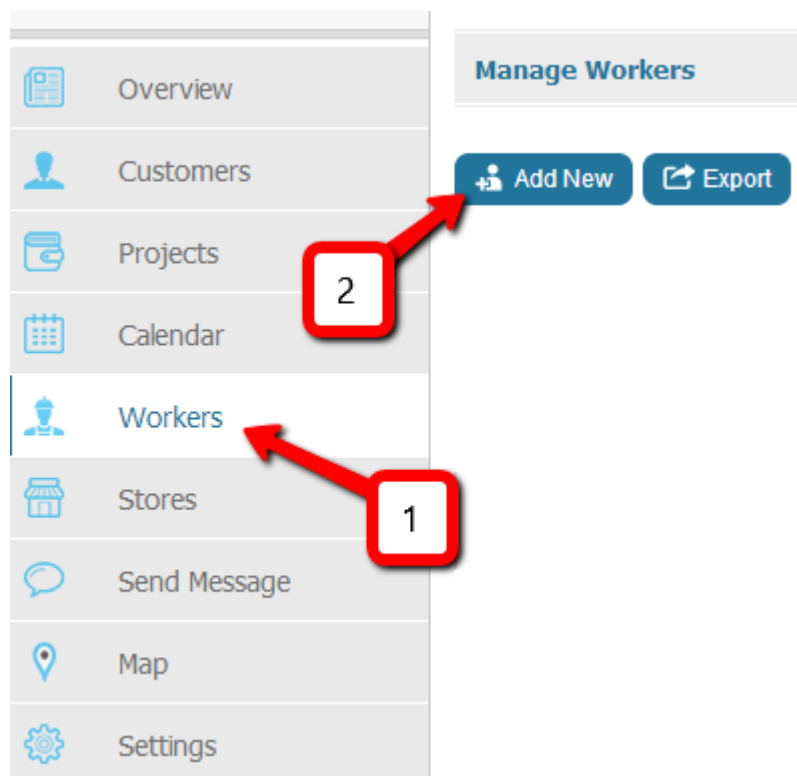
1. Go to the "Customer" tab.
2. Click "Add new".
3. Fill in all required fields
4. Click "Save".

The screenshot shows a form titled "Add New Customer". It contains several input fields for customer information. A red box with the number "3" is placed above the "Contact Name" field, with two red arrows pointing to the "Contact Name" and "Address" fields. Another red box with the number "4" is placed above the "Cancel" and "Save" buttons, with a red arrow pointing to the "Save" button.

Add New Customer			
Contact Name:	Andersson	Address:	Test Street 5
Password(App):	password	Zip Code:	12345
Company Name:	Test	City:	Test
Org/Pers Number:	1234	State:	Test State
Email:	andersson@test.se	Country:	Test Country
Mobile No.:	070123456		
		Cancel	Save

Done. You have added a new customer. The next step is to add a new worker/employee.

Add a worker



1. Go to the "Workers" tab.
2. Click "Add New"

Add New Worker

3

Name: Address:

Password(App): Zip Code:

Email: City:

Mobile No.: State:

Cost: Country:

Worker Skills :

Cancel Save

4

3. Fill in all required fields
4. Click "Save"

Skill Set

5

Skill Category

Skill Name
☐ Målare ☐ Rörmockare ☐ Snickare ☒ Elektriker ☐ Kakelsättare ☐ Golläggare ☐ Maskin Ingenjör

6 7

Save

5. Select a skills category
6. Select the worker's skills
7. Click "Save"

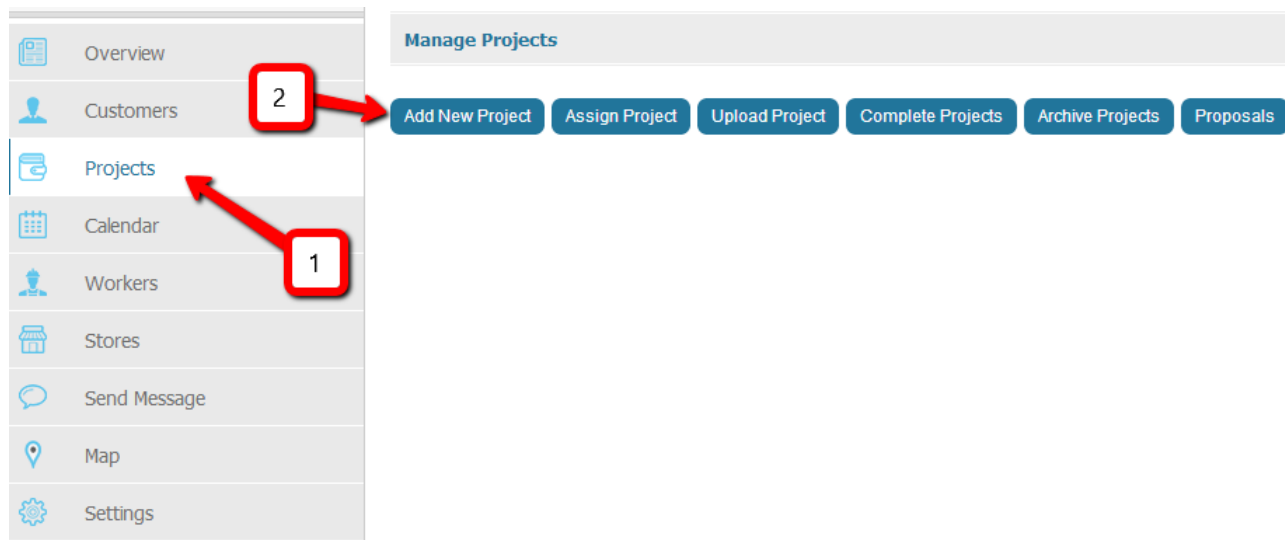
Block	Delete
8 ☒	☐ ×

8. The worker must be active in order to be able to log in to the app. Activate the worker by clicking on the red button. It will turn green, indicating the worker is now active.

Done. All workers you add will log in to the app with the email address and password you gave them when you created the user.

Add a project

Now that you have registered workers and customers, you can create projects for customers, and assign the projects to your workers. All workers will receive a notification in the app with details on their project when they are assigned to a project.



1. Go to the "Project" tab.

The image shows the 'Create New Project' form. It has a header 'Create New Project' and a red box with the number '3' around it. The form is divided into two columns. The left column contains fields for: Project Name (Test Project), Mode (Simple Mode), Customer Name (Andersson), Description (This is a test project), Street Address (Testgatan 5), Zip Code (12345), City (Testgatan 5), State (Testlännet), Country (Testland), Mobile No. (070123456), and Customer view in App (--Select--). The right column contains fields for: Start Date (2014-08-14), End Date (2014-08-14), Time From (09:00), Time To (17:00), Tax Reduction Code (123), Priority (Normal), Project Type (Fixed Price), Price Per Hour/Fixed Price (123), Estimated Hours (123), Comment (This is a test project), and Floor Plan (Choose Files, No file chosen). There are checkboxes for 'Incl. VAT', 'Incl. Material', and 'Incl. Travel'. A red box with the number '4' is around the 'Save' button at the bottom right.

2. Click "Start a new project".

3. Fill in all required fields.

- a) Select customer.
- b) Chose Simple mode or Advance mode (Simple mode for small projects ex. "Paint a Room", all tasks will be created automatically, Advanced mode is for larger projects with many tasks to be planned - ex. "Paint a house" - the project manager will create the tasks manually)
- c) If you do not set start and end date, you will find the project under proposal. All projects where the date is not set are in proposal mode.

4. Click "Save".

Project Assign

6

Project Name:

Test Project

Add New Worker:

Johansson

Start Date:

2014-08-14 09:00:00

End Date:

2014-08-14 17:00:00

Comment:

This is a test assignment

7

Cancel

Save

5. When a project is created you will see that the project is inactive via the red circle to the left. This is because the project has no workers assigned to it. Click "Assign Project"

Manage Projects				
5				
Add New Project	Assign Project	Upload Project	Complete Projects	Archive Projects
Proposals				
Project Name [Project Id]	View Details	Customer [Company]	Start Date	Status
Test Project [1058] View All Images		Andersson [Test AB]	2014-08-14	In Progress 0%

Project Assign

6

Project Name: Test Project

Add New Worker: Johansson

Start Date: 2014-08-14 09:00:00

End Date: 2014-08-14 17:00:00

Comment: This is a test assignment

7

Cancel Save

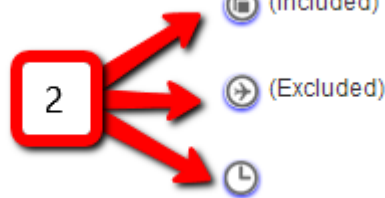
6. Select the project, and a worker to assign the project to.
7. Click "Save"

Done. The worker is now assigned to the project and will receive the work details, location and other information necessary to complete the job.

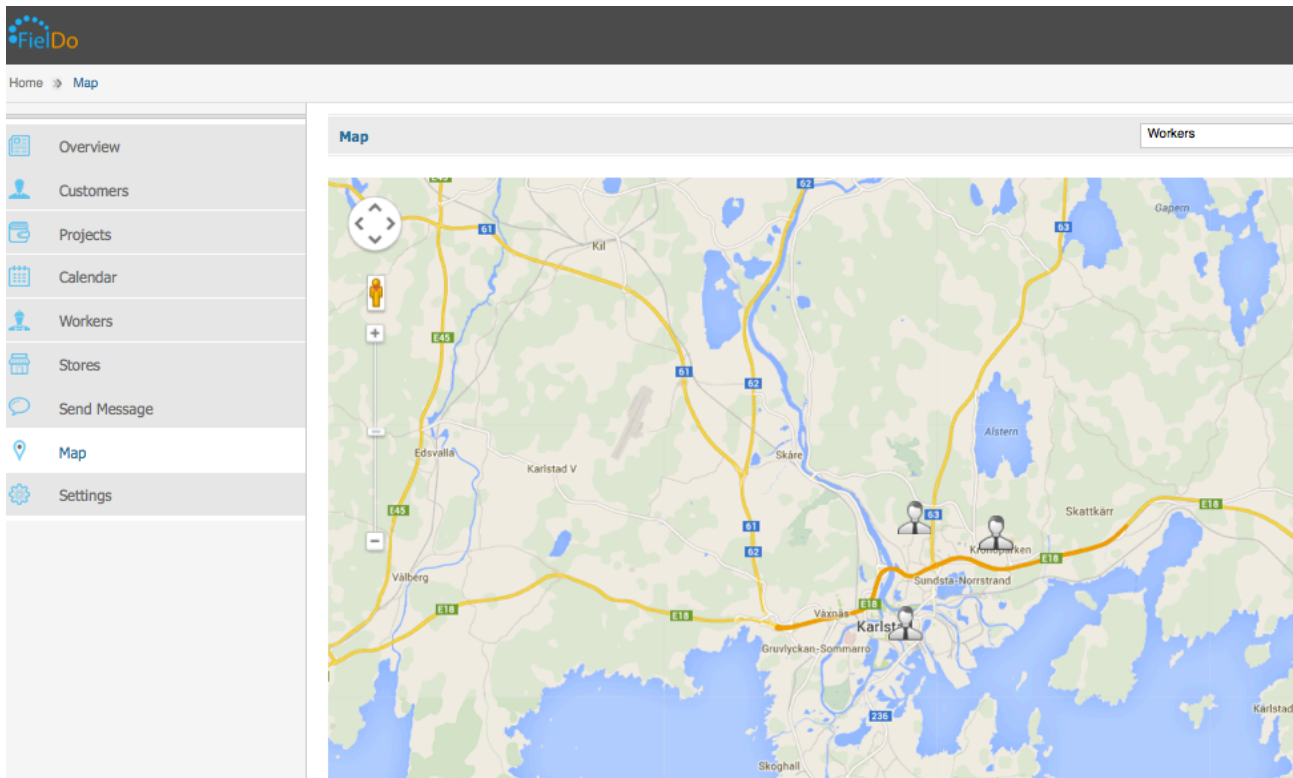
The worker will also log expenses, time and travel from the app, which can be viewed in the project details by clicking here

Project Name [Project Id]	1 View Details	Customer [Company]
 Test Project [1058] View All Images		Andersson [Test AB]

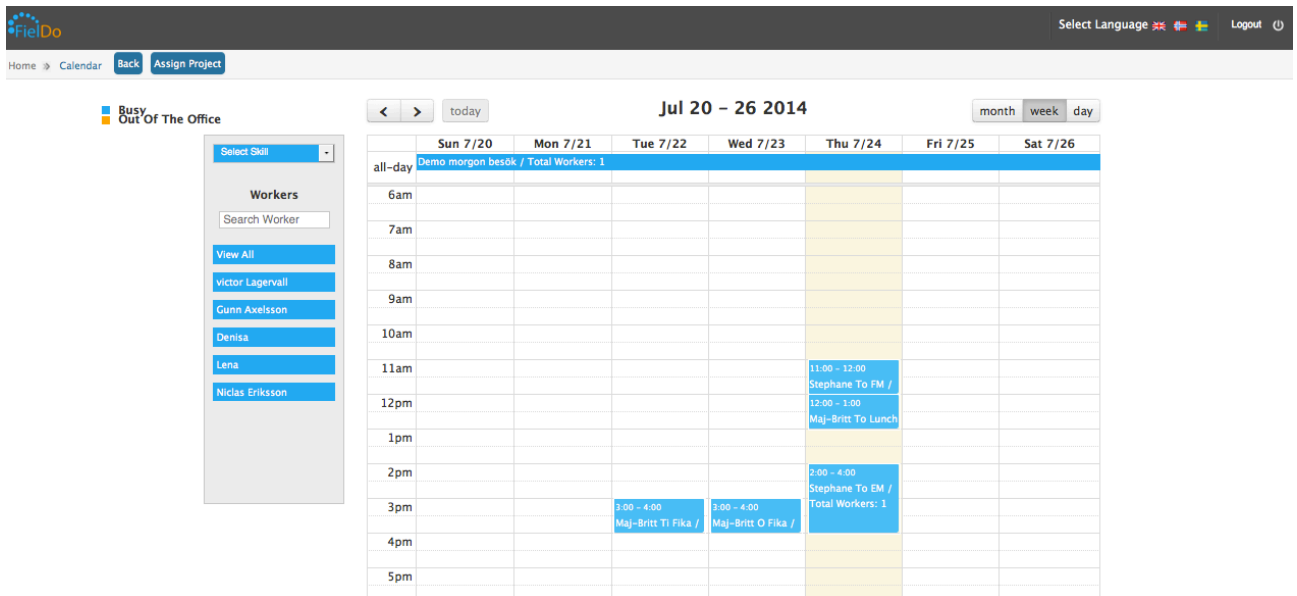
Project Name:	Test Project
Customer Name :	Andersson
Workers:	☒ Johansson (Pending For Approval)
Material Log	☐ (Included)
Travel Log	☐ (Excluded)
Time Log:	☐



From the management web page a project manager can also track the worker on the map (Note: workers' locations are only updated when they input new information into the app)



The project manager can also track the calendar of all workers in the calendar tab



Thank you for using FielDo

For any additional questions, please contact us at support@fieldo.se