

QuikOne FSM

User Guide – Customer Management

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4. Customer Management

4.1 Add Customers

The screenshot shows the 'Add Customer' form in the QuikFSM application. The form is titled 'Add Customer' and is part of the 'Work Order' module. It contains several sections: 'Company Details' with fields for Company Name, Company Type, and Company Address; 'Contact Information' with fields for Email, Contact Person, Phone Number, and Website; 'Additional Information' with a checkbox for 'Send Mail to Customer' and a text area for 'Description / Remarks'; 'Customer Image' with a 'Choose File' button; and 'Branch Management' with a table for adding branches. The 'Branch #1' section includes fields for Branch Name, Branch Address, Email, Contact Person, Phone Number, Dedicated Technician, and Status. The form has 'Cancel' and 'Save' buttons at the bottom right.

The **Add Customer** page allows users to create and maintain customer records in QuikFSM. Customer information is used throughout the application for requests, quotations, contracts, work orders, invoices, and other service activities.

Navigate to:

Work Order → Customer

To create a new customer:

Company Details

1. Enter the **Company Name**.
2. Select the **Company Type**.
3. Select or enter the **Company Address**.

Contact Information

4. Enter the **Email Address**.
5. Enter the **Contact Person**.

6. Enter the **Phone Number**.
7. Enter the **Website** (optional).

Additional Information

8. Enable or disable **Send Mail to Customer** as required.
9. Enter the **Description / Remarks** (optional).
10. Upload the **Customer Image** by clicking **Choose File** (optional).

Branch Management

If the customer has multiple branches or service locations:

1. Click **Add Branch**.
2. Enter the **Branch Name**.
3. Enter the **Email Address**.
4. Enter the **Contact Person**.
5. Enter the **Phone Number**.
6. Select or enter the **Branch Address**.
7. Select the **Dedicated Technician** (if applicable).
8. Select the **Branch Status**.

Repeat the above steps to add additional branches as required.

After entering the required information, click **Save** to create the customer.

Note: Fields marked with an asterisk (*) are mandatory and must be completed before creating the customer.

4.2 Customer Contacts

The screenshot shows a software interface for managing customer contacts. The top navigation bar includes tabs for Customer, Request, Quotations, Work Order, Scheduler, and Reports. The 'Customer' tab is active, showing a 'BASIC INFO' section with fields for Company Name, Email, Direct Line, and Location. The main form area is titled 'Add Additional Contact' and contains two sections: 'Contact Details' and 'Company Address'. The 'Contact Details' section has fields for First Name, Last Name, Mobile Number (with a dropdown for country code, currently showing +91), and Email. The 'Company Address' section has a dropdown for Customer Address, a plus sign to add more addresses, and fields for Address Line 1, City, State, Country, and Pincode. There is also a checkbox for 'Is Primary'. At the bottom right of the form are 'Cancel' and 'Save' buttons.

The **Additional Contacts** page allows users to add and manage multiple contact persons for a customer. This feature is useful when a customer has multiple representatives or points of contact for communication and service coordination.

Navigate to:

Work Order → Customer → Additional Contacts

To add an additional contact:

Contact Details

1. Enter the **First Name**.
2. Enter the **Last Name** (optional).
3. Enter the **Mobile Number**.
4. Enter the **Email Address**.

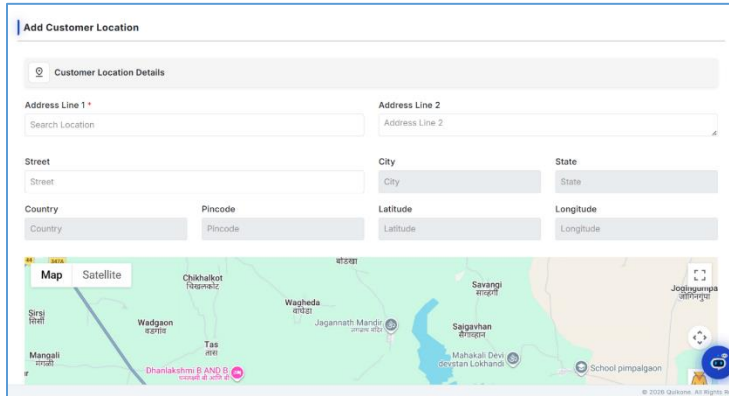
Company Address

5. Select the **Customer Address**.
6. Verify or update the **Address Line 1**, **City**, **State**, **Country**, and **Pincode**, if required.
7. Select **Is Primary** if the contact should be designated as the primary contact for the customer.

Click **Save** to add the contact person or **Cancel** to discard the changes.

Note: Fields marked with an asterisk (*) are mandatory and must be completed before saving the additional contact.

4.3 Customer Locations



The **Customer Location** page allows users to add and manage customer service locations. Customer locations are used when creating work orders, scheduling technician visits, and tracking service activities.

Navigate to:

Work Order → Customer → Customer Location

To add a customer location:

Customer Location Details

1. Enter or search for the **Address Line 1**.
2. Enter **Address Line 2** (optional).
3. Enter the **Street** (if applicable).
4. Verify or update the **City**.
5. Verify or update the **State**.
6. Verify or update the **Country**.
7. Enter or verify the **Pincode**.
8. Verify the **Latitude** and **Longitude** coordinates.

Map Location

The integrated map displays the selected customer location.

- Use the map to verify the location.

- Adjust the location, if required, to ensure accurate navigation for field technicians.

After entering the required information, click **Save** to add the customer location.

Note: Fields marked with an asterisk (*) are mandatory and must be completed before saving the customer location.

4.4 Customer Products

Add Customer Products

Product Details

Product*

Model*

Serial Number

Ordered Date

Purchase Date

Price

Description

Installation Details

Installation Status

Warranty Information

AMC Information

Service Tracking

Select

Select

Serial Number

Ordered Date

Purchase Date

0

Description...

Installed

Not Installed

Warranty Available

Yes

No

AMC Available

Yes

No

Last Service Date

Next Service Date

The **Customer Products** page allows users to register products or equipment owned by a customer. Product records are used to manage installations, warranty information, Annual Maintenance Contracts (AMC), and future service schedules.

Navigate to:

Work Order → Customer → Customer Products

To add a customer product:

Product Details

1. Select the **Product**.
2. Select the **Model**.
3. Enter the **Serial Number** (if applicable).
4. Select the **Ordered Date**.
5. Select the **Purchase Date**.
6. Enter the **Product Price**.
7. Enter a **Description** (optional).

Installation Details

8. Select the **Installation Status**:
 - **Installed**
 - **Not Installed**

Warranty Information

9. Specify whether **Warranty** is available by selecting **Yes** or **No**.

AMC Information

10. Specify whether an **Annual Maintenance Contract (AMC)** is available by selecting **Yes** or **No**.

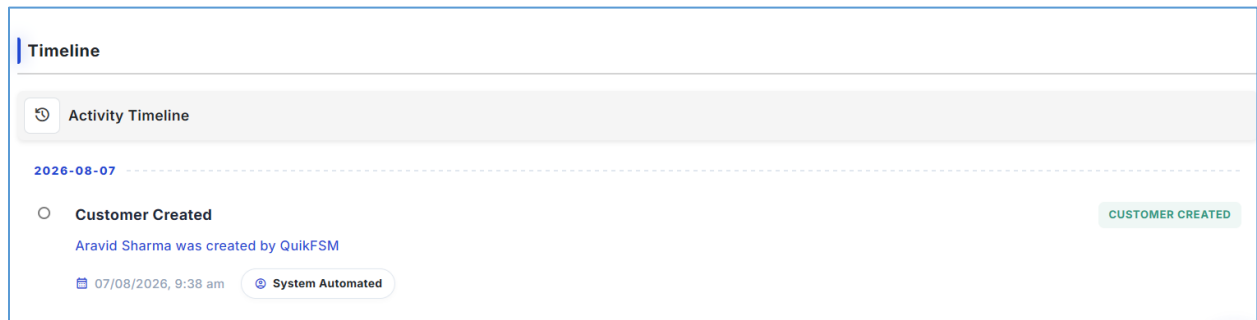
Service Tracking

11. Select the **Last Service Date**.
12. Select the **Next Service Date**.

After entering the required information, click **Save** to add the customer product.

Note: Fields marked with an asterisk (*) are mandatory and must be completed before saving the customer product.

4.5 Activity Timeline



The **Activity Timeline** provides a chronological history of all activities performed for a customer. It helps users track important events, monitor customer interactions, and maintain a complete audit trail throughout the customer lifecycle.

Navigate to:

Work Order → Customer → Timeline

The Activity Timeline records customer-related events, including:

- Customer Creation
- Requests
- Quotations
- Requirements
- Contracts
- Work Orders
- Scheduler Activities
- Invoices
- Receipts
- Customer Updates
- Other system and user activities

Each timeline entry displays:

- Activity Name
- Activity Description
- Date and Time
- User or System that performed the activity
- Activity Status (where applicable)

The timeline is displayed in chronological order, allowing users to easily review the complete history of customer interactions and service activities.

Note: Activities are recorded automatically as users perform actions within QuikFSM. The information displayed may vary depending on the customer's transaction history.