

QuikOne FSM

User Guide - Onboarding

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1. Onboarding

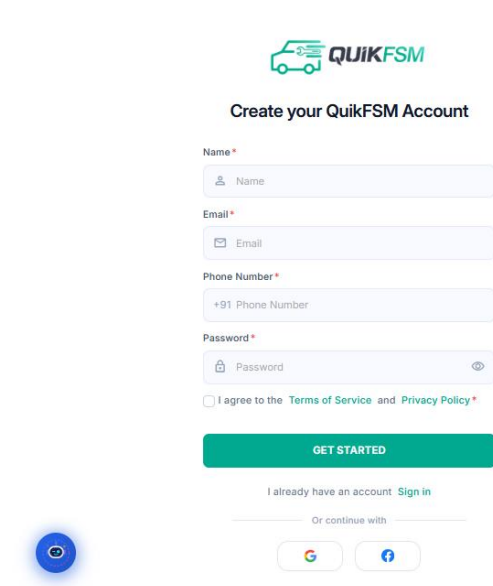
When you create a **QuikFSM** account for your organization, you will be guided through a simple onboarding process to configure your account and prepare your workspace for managing field service operations.

During the onboarding process, you will need to complete the following steps.

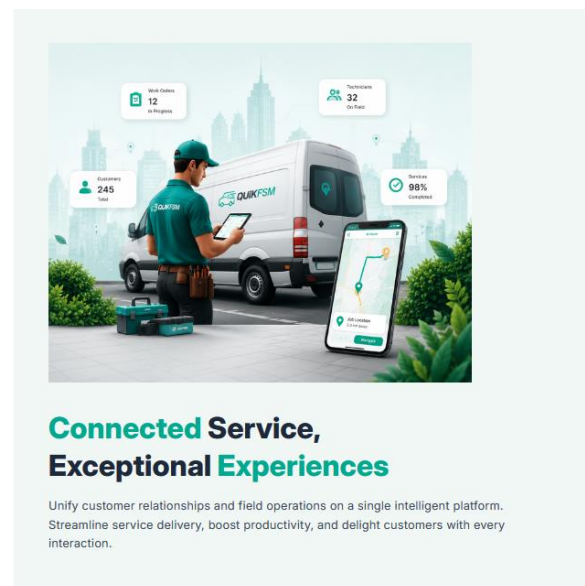
1.1 Create Your Account

To create your QuikFSM account:

1. Enter your **Full Name**.
2. Enter your **Email Address**.
3. Enter your **Phone Number**.
4. Create a **Password**.
5. Read and accept the **Terms of Service** and **Privacy Policy**.
6. Click **Get Started**.



The image shows the 'Create your QuikFSM Account' form. At the top is the QuikFSM logo. Below it, the title 'Create your QuikFSM Account' is centered. The form fields are: 'Name *' with a person icon, 'Email *' with an envelope icon, 'Phone Number *' with a plus sign and '91' prefix, and 'Password *' with a lock icon and a toggle for visibility. Below the password field is a checkbox for 'I agree to the Terms of Service and Privacy Policy *'. A green 'GET STARTED' button is at the bottom. Below the button, there is a link 'I already have an account Sign in' and a section 'Or continue with' with Google and Facebook icons.



After clicking **Get Started**, a One-Time Password (OTP) will be sent to your registered email address for verification.

Add OTP Verification Screenshot

Enter the OTP received in your email and click **Submit** to verify your account. Once the verification is successful, you will gain access to the QuikFSM application.

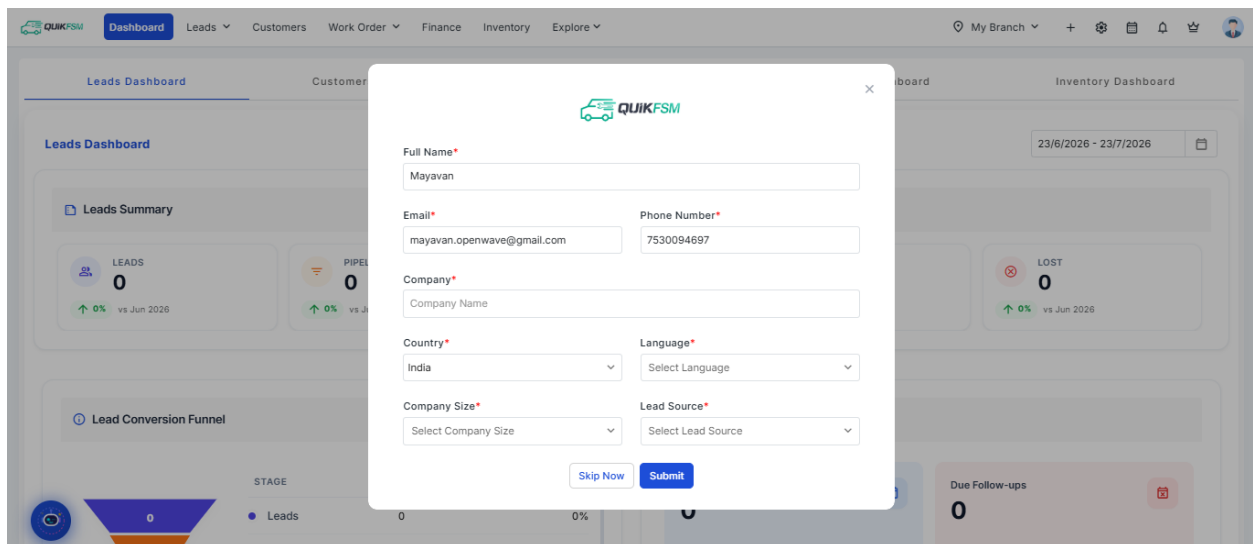
1.2 Complete Your Company Profile

After your first login, QuikFSM will prompt you to complete your company profile by providing the following information:

- Company Name
- Country
- Preferred Language
- Company Size
- Lead Source

If you do not wish to complete these details immediately, click **Skip**. You can update this information later by navigating to:

Profile Icon → My Account

A screenshot of the QuikFSM dashboard with a company profile setup modal open. The modal is titled 'QUIKFSM' and contains the following fields: 'Full Name*' with the value 'Mayavan', 'Email*' with 'mayavan.openwave@gmail.com', 'Phone Number*' with '7530094697', 'Company*' with 'Company Name', 'Country*' with a dropdown set to 'India', 'Language*' with a dropdown set to 'Select Language', 'Company Size*' with a dropdown set to 'Select Company Size', and 'Lead Source*' with a dropdown set to 'Select Lead Source'. At the bottom of the modal are 'Skip Now' and 'Submit' buttons. The background shows the dashboard with sections for 'Leads Dashboard', 'Leads Summary', 'Lead Conversion Funnel', and 'Inventory Dashboard'.

1.3 Company Setup

Configure your organization's information so it appears correctly across the application, customer communications, and service documents.

Navigate to:

Settings → Company Settings

Update the following information:

Basic Information

- Site Title
- Tagline
- Website URL
- Company Logo

Company Contact Information

- Email Address
- Phone Number
- Mobile Number

Company Address

- Address Line
- City
- State/Province
- Postal Code
- Country

The screenshot displays the QuikFSM Settings interface. The top navigation bar includes links for Dashboard, Leads, Customers, Work Order, Finance, Inventory, and Explore. The main header shows 'My Branch' and various utility icons. The left sidebar lists settings categories: Company Settings (selected), Theme Settings, Notifications, and Integrations. The main content area is titled 'Company Settings' and contains a 'Basic Information' section. This section includes the following fields:

- Site Title***: Mayavan's Company
- Company Name***: Mayavan's company
- Company Short Name***: Mayavan's Company
- Company Code**: Company Code
- Company Tagline**: Company Tagline
- Website**: Website
- Company Logo**: A placeholder showing the QuikFSM logo with the text 'document_type...' below it.
- Fav Icon**: A placeholder showing a colorful icon with the text 'logo-17806702...' below it.

1.4 Navigation Menu

The **Navigation Menu** provides quick access to the major modules and features available in QuikFSM. Depending on your user role and permissions, the available menu options may vary.

The main navigation bar is located at the top of the application and allows users to access different functional areas of the system.

Main Navigation Menu

The following menus are available in the application:

- **Dashboard** – Displays business dashboards, key metrics, and system overview.
- **Work Order** – Manage work orders and technician operations.
- **Finance** – Access finance-related transactions and records.
- **Inventory** – Manage inventory, products, and stock movements.
- **Explore** – Access system configuration, administration, templates, and other platform settings.

Work Order Menu

The **Work Order** menu provides access to:

- **Work Order**
- **Technician Operations**

Explore Menu

The **Explore** menu provides access to the following sections:

Play Menu

- Automation
- Support

Manage

- Branch
- Users
- Role

Master

- Work Order
- Inventory
- Finance
- Technician App

Campaigns

- Templates

Internal

- Table Manager
- Form Page
- Form Dropdown
- Custom Fields

Note: The menus and options displayed may vary depending on the user's role, permissions, and subscription plan.

1.5 Dashboard Overview

The **Dashboard** provides a centralized view of your organization's operational, financial, and inventory performance. It enables users to monitor key metrics, track daily activities, and access important business information from a single location.

Navigate to:

Dashboard

QuikFSM provides the following dashboard sections:

Work Order Dashboard

The **Work Order Dashboard** provides a real-time overview of field service operations and technician activities.

It includes:

- Graph Summary
- Work Order Summary
- Work Order Status Overview
- Today's Schedule
- Live Technician Map
- Work Orders by Technician
- Upcoming Schedules

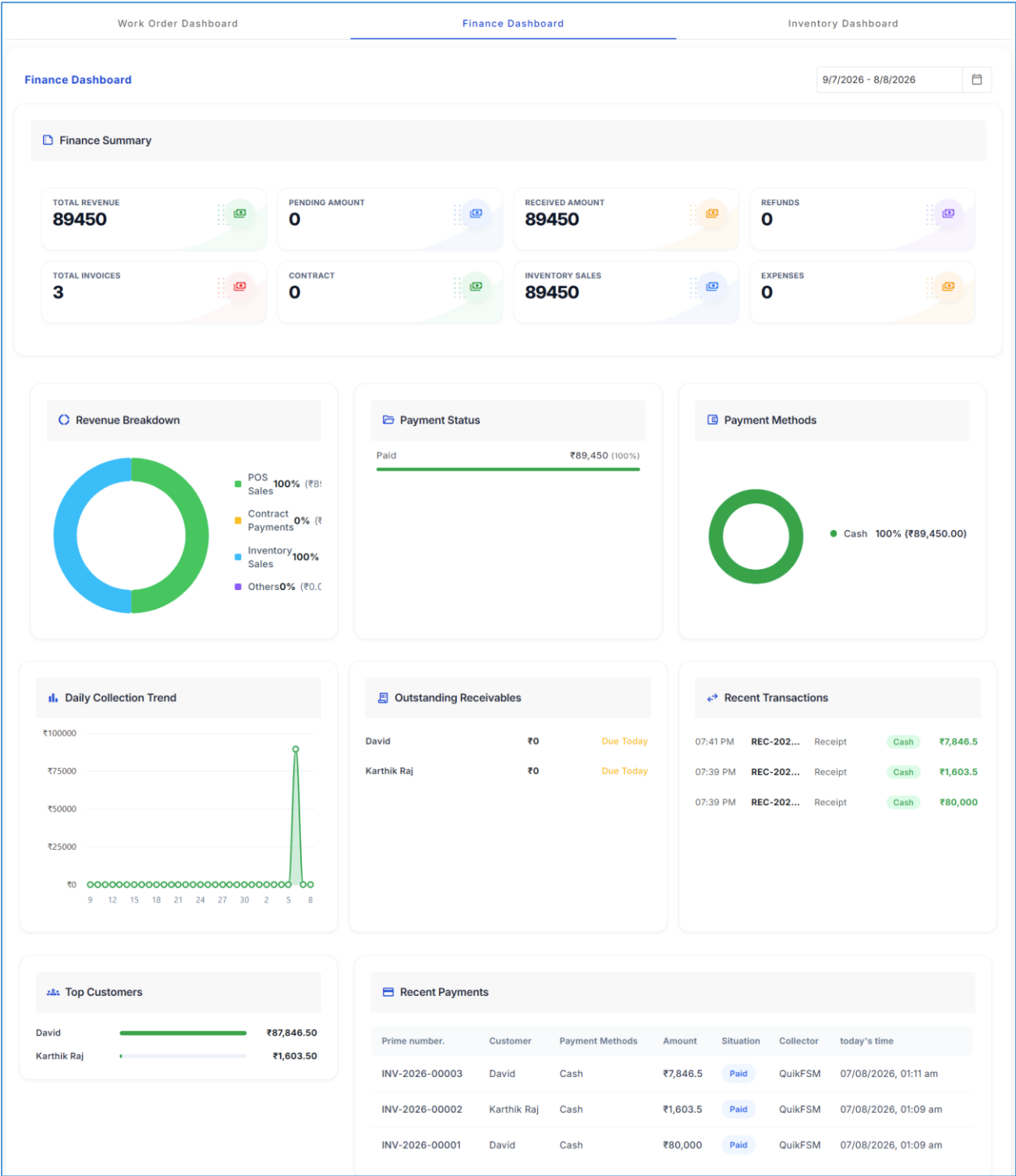
- Work Orders by Priority

Finance Dashboard

The **Finance Dashboard** provides a comprehensive overview of your organization's financial performance and transactions.

It includes:

- Finance Summary
- Revenue Breakdown
- Payment Status
- Payment Methods
- Daily Collection Trend
- Outstanding Receivables
- Recent Transactions
- Top Customers
- Recent Payments



Inventory Dashboard

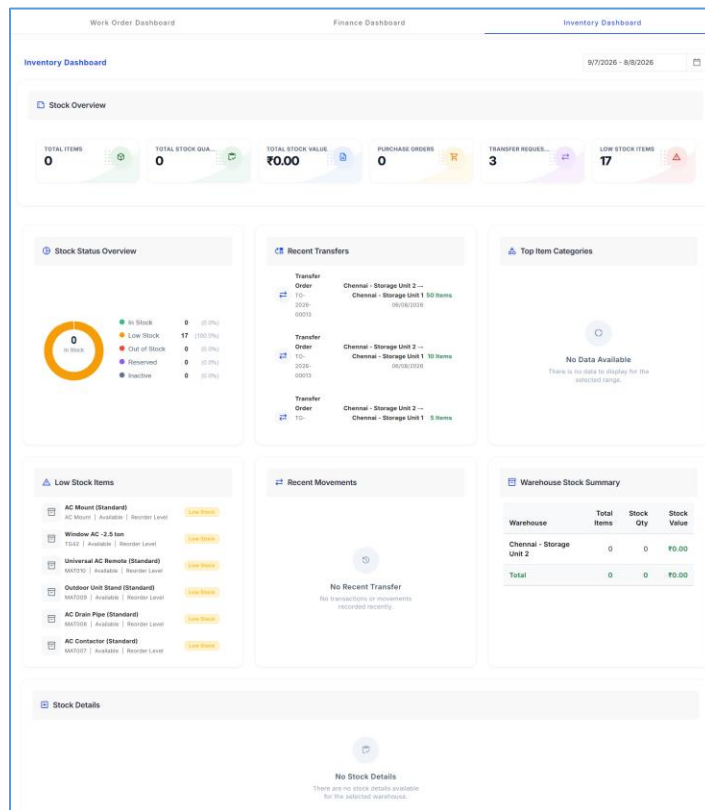
The **Inventory Dashboard** provides a real-time overview of inventory status across warehouses and storage locations.

It includes:

- Stock Overview
- Stock Status Overview
- Recent Transfers
- Top Item Categories
- Low Stock Items
- Recent Movements
- Warehouse Stock Summary
- Stock Details

Date Filter

Use the **Date** or **Date Range** selector available on each dashboard to view dashboard information for a specific period.



Note: The dashboard information displayed is based on the selected date or date range and may vary depending on your user role, permissions, and available business data.