

QuikOne FSM

User Guide – Technician Management

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6. Technician Management

6.1 Add Technicians

The screenshot shows the 'Add Technician' form within the 'Tracking' application. The breadcrumb trail is 'Tracking / Tracking / Technicians / Add Technician'. A navigation bar at the top contains links for 'Technician' (Create Technician), 'Request' (Create Request), 'Stocks' (Technician Stocks), 'Allocation' (Allocation), 'Duty Log' (Duty), and 'Tracking' (Tracking). The form itself is titled 'Add Technician' and contains several input fields: 'First Name' (required), 'Last Name' (optional), 'Email' (required), 'Password' (required with a toggle for visibility), 'Phone Number' (required with a country code dropdown set to '+91'), 'Role' (required dropdown menu with 'Select' as the current value and a red error message 'Role is required.' below it), 'Skill' (dropdown menu with 'Select' as the current value), and 'Service Hub' (dropdown menu with 'Select Service Hub' as the current value). At the bottom left, there is a 'Choose File' button with a document icon.

The **Add Technician** page allows administrators to create technician accounts and assign them to the appropriate role, skills, and service hub. Technician accounts are used to assign work orders, track field activities, and manage service operations.

Navigate to:

Work Order → Technician Operations → Add Technician

To create a new technician:

Basic Information

1. Enter the **First Name**.
2. Enter the **Last Name** (optional).
3. Enter the **Email Address**.
4. Enter a **Password**.
5. Enter the **Phone Number**.
6. Select the **Role**.

Technician Information

7. Select the **Skill**.

8. Select the **Service Hub**.

9. Upload a **Profile Picture** by clicking **Choose File** (optional).

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

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

6.2 Technicians Request

Technicians Request								
Technicians Request								
Technician Create Technician Technicians Request Technicians Request Allocation Allocation Work Orders Stocks Technician Stocks Duty Log Duty Tracking Tracking								
Technicians Request Search...								
Request Type	Remarks	Status	Approved By	Approved At	UpdatedAt	Technician Name	Request Date	
☐ Material Request	-	Pending	-	-	09-08-2026, 09:25 am	Thilak Varma	09-08-2026, 09:25 am	
☐ Material Request	-	Pending	-	-	09-08-2026, 09:25 am	Thilak Varma	09-08-2026, 09:25 am	
☐ Leave	tt	Pending	-	-	09-08-2026, 09:25 am	Thilak Varma	09-08-2026, 09:25 am	
☐ Leave	test	Pending	-	-	09-08-2026, 09:25 am	Thilak Varma	09-08-2026, 09:25 am	
☐ Reschedule	test moved to reschedule	Pending	-	-	09-08-2026, 09:22 am	Thilak Varma	09-08-2026, 09:22 am	
☐ Customer Unavailable	test schedule	Pending	-	-	09-08-2026, 09:13 am	Thilak Varma	09-08-2026, 09:13 am	
☐ Other Reasons	unable to attend	Pending	-	-	09-08-2026, 09:12 am	Thilak Varma	09-08-2026, 09:12 am	
☐ Closed By Customer	cancelled	Pending	-	-	09-08-2026, 09:07 am	Thilak Varma	09-08-2026, 09:07 am	

The **Technician Requests** page allows supervisors and administrators to view, review, and manage requests submitted by technicians during their daily field operations. These requests help streamline communication between field technicians and the office while maintaining a complete record of approvals and request history.

Navigate to:

Work Order → Technician Operations → Technician Requests

The Technician Requests page displays the following information:

- Request Type
- Remarks
- Request Status
- Approved By
- Approval Date
- Last Updated Date
- Technician Name

- Request Date

Request Types

Technicians can submit different types of operational requests, including:

- Material Request
- Leave Request
- Reschedule Request
- Customer Unavailable
- Closed by Customer
- Other Requests

Review and Manage Requests

Administrators or supervisors can:

- View technician requests.
- Review the request details and remarks.
- Approve or reject requests.
- Monitor the current request status.
- Track approval information and request history.

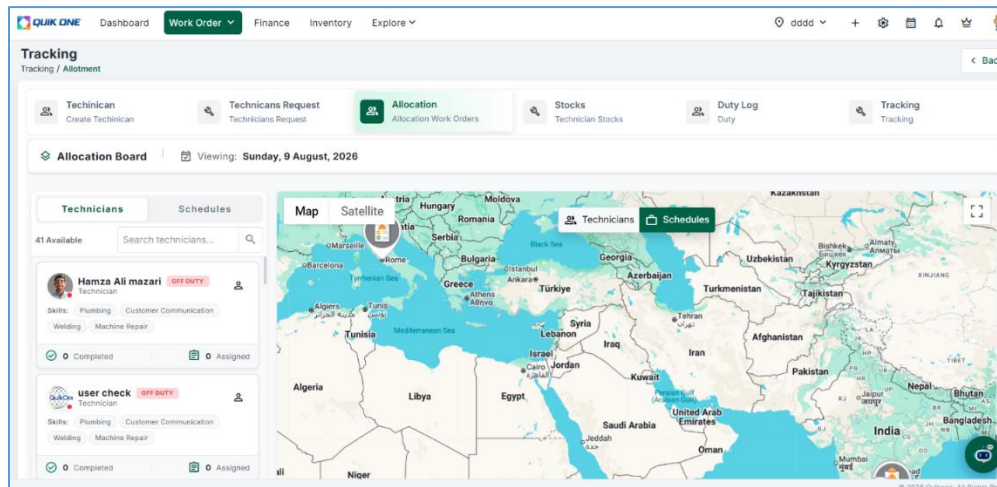
Search and Export

Use the available options to:

- Search requests by technician, request type, or status.
- Export the request list for reporting or analysis.

Note: All technician requests are recorded with the request date, last updated date, and approval details, providing a complete audit trail for operational activities.

6.3 Allocation



The **Work Order Allocation** page enables dispatchers and supervisors to assign work orders and schedules to technicians. It provides a centralized allocation board with technician availability, schedules, and a live map to support efficient workforce planning.

Navigate to:

Work Order → Technician Operations → Allocation

The Allocation Board displays the following information:

- Technician List
- Technician Availability
- Assigned Work Orders
- Completed Work Orders
- Technician Skills
- Daily Schedule
- Interactive Map View

View Technicians

The **Technicians** tab displays all available technicians along with their:

- Name
- Availability Status
- Skills
- Completed Work Orders

- Assigned Work Orders

Use the **Search** box to quickly locate a technician.

View Schedules

Select the **Schedules** tab to view all work orders and schedules for the selected date.

Allocation Board

The Allocation Board provides a visual interface for assigning work orders to technicians.

Users can:

- View available technicians.
- Review technician workloads.
- View technician skills.
- View assigned schedules.
- Allocate work orders to suitable technicians.

Map View

The integrated map displays technician and schedule locations.

Use the map to:

- View technician locations.
- Review scheduled work locations.
- Support efficient work order allocation based on location.

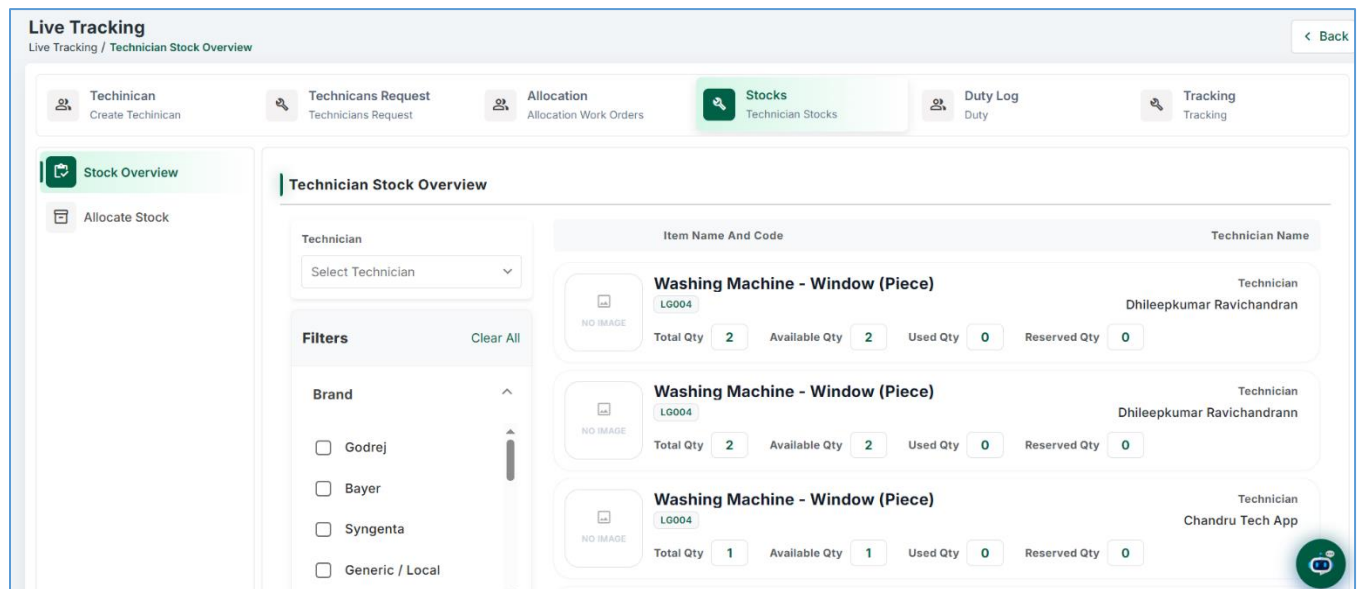
Date Selection

The selected date is displayed at the top of the Allocation Board.

Change the date to view and manage technician allocations for a different day.

Note: Technician availability, schedules, and allocation details are displayed based on the selected date and may vary depending on user permissions and operational data.

6.4 Stocks



The **Technician Stocks** page provides a centralized view of inventory assigned to technicians. It enables supervisors and inventory managers to monitor stock availability, utilization, and reservations for each technician.

Navigate to:

Work Order → Technician Operations → Stocks

The Technician Stocks page displays the following information for each allocated item:

- Item Name
- Item Code
- Technician Name
- Total Quantity
- Available Quantity
- Used Quantity
- Reserved Quantity

View Technician Stock

1. Select a **Technician** from the dropdown list.
2. The system displays all inventory items currently assigned to the selected technician.

Filter Stock

Use the available filters to refine the stock list based on product attributes, such as:

- Brand
- Product Category
- Product Type
- Other available filter options

Click **Clear All** to remove the applied filters.

Stock Overview

For each inventory item, the system displays:

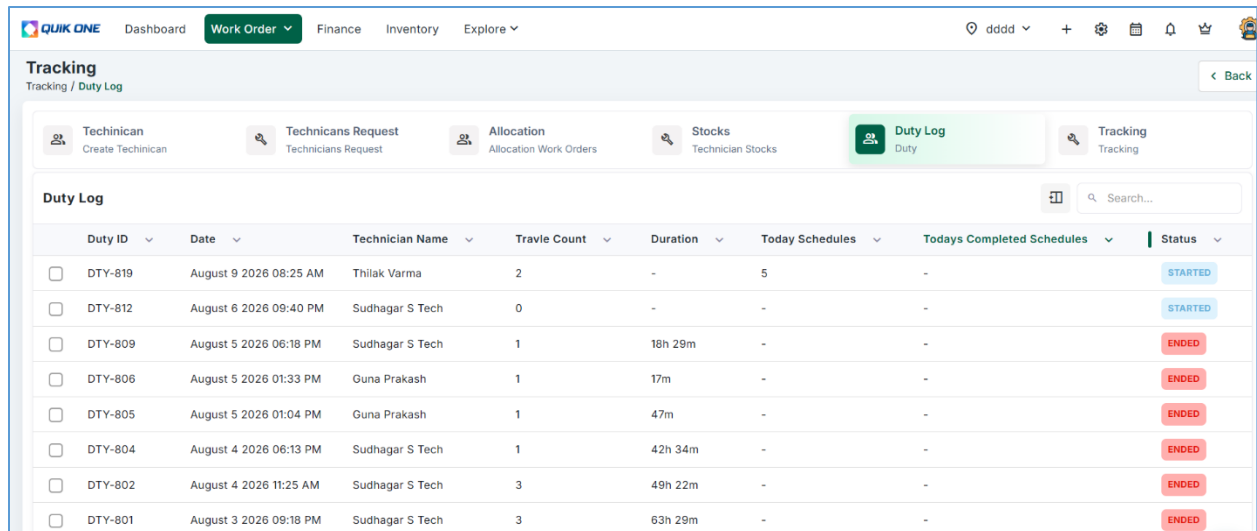
- **Total Quantity** – Total quantity allocated to the technician.
- **Available Quantity** – Quantity currently available for use.
- **Used Quantity** – Quantity already consumed or issued.
- **Reserved Quantity** – Quantity reserved for scheduled work orders.

Allocate Stock

Select **Allocate Stock** from the left navigation menu to assign additional inventory items to technicians.

Note: The displayed stock quantities are updated based on inventory allocations, material consumption, and work order activities.

6.5 Duty Log



The screenshot displays the Quik One web application interface. The top navigation bar includes 'Dashboard', 'Work Order' (selected), 'Finance', 'Inventory', and 'Explore'. The 'Tracking' section is active, showing a sidebar with 'Technician', 'Technicians Request', 'Allocation', 'Stocks', 'Duty Log' (selected), and 'Tracking'. The main content area shows the 'Duty Log' table with columns: Duty ID, Date, Technician Name, Travle Count, Duration, Today Schedules, Todays Completed Schedules, and Status. The table lists 9 entries with various dates and technician names, showing their duty status (STARTED or ENDED).

Duty ID	Date	Technician Name	Travle Count	Duration	Today Schedules	Todays Completed Schedules	Status
DTY-819	August 9 2026 08:25 AM	Thilak Varma	2	-	5	-	STARTED
DTY-812	August 6 2026 09:40 PM	Sudhagar S Tech	0	-	-	-	STARTED
DTY-809	August 5 2026 06:18 PM	Sudhagar S Tech	1	18h 29m	-	-	ENDED
DTY-806	August 5 2026 01:33 PM	Guna Prakash	1	17m	-	-	ENDED
DTY-805	August 5 2026 01:04 PM	Guna Prakash	1	47m	-	-	ENDED
DTY-804	August 4 2026 06:13 PM	Sudhagar S Tech	1	42h 34m	-	-	ENDED
DTY-802	August 4 2026 11:25 AM	Sudhagar S Tech	3	49h 22m	-	-	ENDED
DTY-801	August 3 2026 09:18 PM	Sudhagar S Tech	3	63h 29m	-	-	ENDED

The **Duty Log** module enables supervisors and managers to monitor technicians' daily attendance and work activities. It provides a consolidated view of each technician's duty status, schedules, travel count, working duration, and completed jobs, helping track workforce productivity and availability.

Navigation:

Work Order → Technician Operations → Duty Log

The Duty Log displays the following information for each technician:

- Duty ID
- Duty Start Date and Time
- Technician Name
- Travel Count
- Duty Duration
- Total Scheduled Jobs for the Day
- Completed Jobs
- Current Duty Status

View Duty Log

1. Navigate to **Work Order → Technician Operations → Duty Log**.
2. The system displays the list of technician duty records.
3. Review each record to monitor technician attendance and daily work progress.

Search Duty Records

1. Use the **Search** box in the upper-right corner.
2. Enter the Technician Name or Duty ID.
3. The matching duty records are displayed instantly.

Understand Duty Status

The Duty Log displays the current status of each technician's duty:

- **Started** – The technician has started the workday and is currently on duty.
- **Ended** – The technician has completed the workday and ended the duty session.

Monitor Technician Performance

The Duty Log provides operational metrics including:

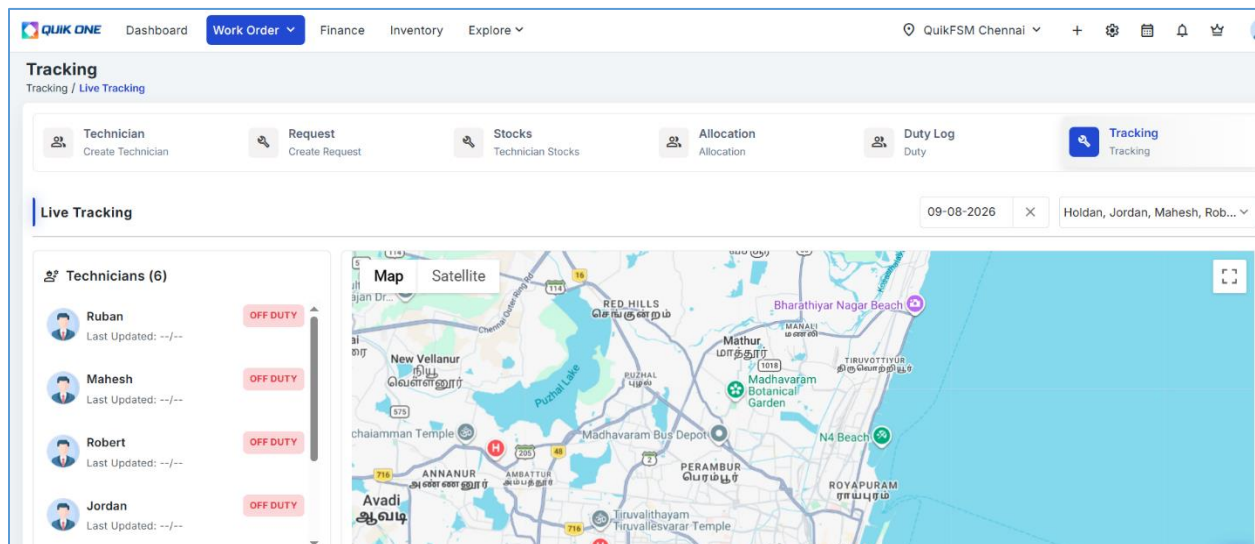
- Number of customer visits (Travel Count)

- Total duty duration
- Number of schedules assigned for the day
- Number of completed schedules
- Current duty status

These metrics help supervisors monitor technician productivity and daily field activities.

Note: Duty information is automatically updated based on technician activities performed through the Technician Mobile Application.

6.6 Tracking



The **Live Tracking** module enables supervisors and dispatchers to monitor the real-time location and availability of field technicians on an interactive map. It provides a centralized view of technician locations, duty status, and the last location update, allowing efficient monitoring and quick decision-making.

Navigation:

Work Order → Technician Operations → Tracking

The Live Tracking screen provides the following features:

- Real-time map displaying technician locations.
- Technician list with current duty status.
- Date filter to view tracking information for a selected day.
- Technician filter to display one or more selected technicians.
- Live location updates from the Technician Mobile App.

View Live Tracking

1. Navigate to **Work Order → Technician Operations → Tracking**.
2. The system displays:
 - A list of technicians on the left panel.
 - An interactive map showing technician locations.
3. Select a technician from the list to focus on their location on the map.

Filter Tracking Information

You can filter the displayed tracking information using:

- **Date** – Select a specific date to view tracking records.
- **Technician Filter** – Select one or multiple technicians to display only their locations.

Technician Information

Each technician card displays:

- Technician Name
- Current Duty Status (On Duty / Off Duty)
- Last Location Update Time

This information helps supervisors quickly identify technician availability and field activity.

Map View

The interactive map allows you to:

- View technician locations.
- Switch between **Map** and **Satellite** view.
- Zoom in or out for better visibility.
- Monitor technicians across different service areas.

Note: Live location tracking is available only when technicians are logged into the Technician Mobile App, have started their duty, and location services are enabled on their device.