

QuikOne FSM

User Guide – User Management

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3. User Management

3.1 Create Admin Users

The screenshot shows the 'Add User' form within a 'Users' management interface. At the top, there's a breadcrumb 'Users / Add User' and a '< Back' button. The form is titled 'Add User' and is divided into two main sections: 'Basic Information' and 'Additional Information'. The 'Basic Information' section includes fields for 'First Name*', 'Last Name', 'Email*', 'Password*', 'Phone Number*' (with a '+40' dropdown), and 'Alternative Phone Number' (with a '+40' dropdown). The 'Additional Information' section includes 'Branch*' (a dropdown), 'Default Branch' (a dropdown), 'Role*' (a dropdown), 'Default Role' (a dropdown), 'Employee Id' (a text field), 'Joining Date' (a date picker), and a 'Status' toggle set to 'Active'. Below these fields is a 'Comments' section with a rich text editor toolbar and a large text area. At the bottom left, there is a 'Choose File' button with a document icon.

The **Add User** page allows administrators to create new users and assign them to a branch and role within the organization. User accounts can be created for administrators, managers, supervisors, customer support executives, finance users, inventory users, and other office staff based on the assigned role.

Navigate to:

Explore → Users → Add User

To create a new user:

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. Enter the **Alternative Phone Number** (optional).

Additional Information

7. Select the **Branch**.
8. Select the **Default Branch**.
9. Select the **Role**.
10. Select the **Default Role**.
11. Enter the **Employee ID** (if applicable).
12. Select the **Joining Date**.
13. Enable or disable the **Active** status.
14. Enter any additional comments or notes (optional).
15. Upload a **Profile Picture** by clicking **Choose File** (optional).

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

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

3.2 Create Office Staff

The **Add User** page allows administrators to create office staff accounts and assign them to the appropriate branch and role within the organization. Office staff may include administrators, managers, supervisors, customer support executives, finance users, inventory users, sales executives, and other internal users.

Navigate to:

Explore → Users → Add User

To create a new office staff account:

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. Enter the **Alternative Phone Number** (optional).

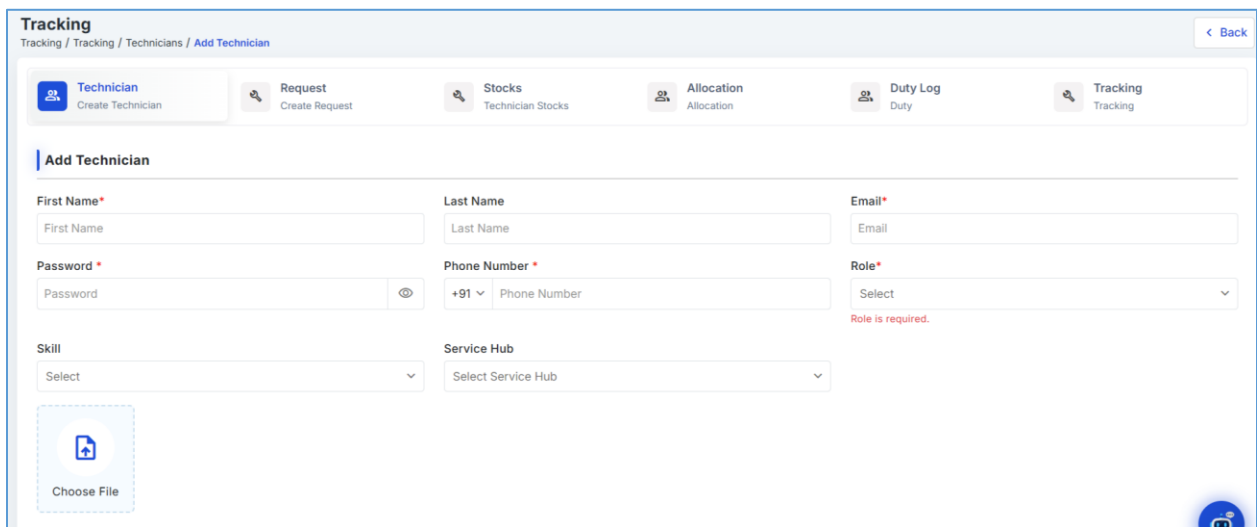
Additional Information

7. Select the **Branch**.
8. Select the **Default Branch**.
9. Select the **Role**.
10. Select the **Default Role**.
11. Enter the **Employee ID** (if applicable).
12. Select the **Joining Date**.
13. Enable or disable the **Active** status.
14. Enter any additional comments or notes (optional).
15. Upload a **Profile Picture** by clicking **Choose File** (optional).

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

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

3.3 Create Technician



The screenshot shows the 'Add Technician' form within the 'Tracking' system. The form is titled 'Add Technician' and is part of the 'Tracking' system. It includes the following fields and options:

- First Name***: Text input field.
- Last Name**: Text input field.
- Email***: Text input field.
- Password ***: Text input field with a toggle for visibility.
- Phone Number ***: Text input field with a dropdown for country code (+91).
- Role***: Dropdown menu with 'Select' as the current option. A red error message 'Role is required.' is displayed below the dropdown.
- Skill**: Dropdown menu with 'Select' as the current option.
- Service Hub**: Dropdown menu with 'Select Service Hub' as the current option.
- Choose File**: Button for uploading a profile picture.

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.

[3.4 User Roles & Permission](#)

Role

Role / Add Role

< Back

Add Role

Role Name*

Role Code*

Super Admin Access

Technician Access

Customer Access

All Lead Access

Status

Active

Modules

>

Select All

Dashboard Permissions

Dashboard

>

Work Order Management

>

Finance Management

>

Inventory Management

>

Setting

>

Main Menu

>

Manage

>

Main Master

>

Internal

>

PRIVILEGES	LIST	ADD	EDIT	VIEW	DELETE	DOWNLOAD
Dashboard (Module)	☐					
Workorder	☐	☐	☐	☐	☐	☐
Finance	☐	☐	☐	☐	☐	☐
Inventory	☐	☐	☐	☐	☐	☐

The **Add Role** page allows administrators to create user roles and configure access permissions for different modules and features within QuikFSM. Role-based access control helps ensure that users can only access the functions required for their responsibilities.

Navigate to:

Explore → Role → Add Role

To create a new role:

Role Information

1. Enter the **Role Name**.
2. Enter the **Role Code**.
3. Enable or disable the **Active** status.

Access Type

Select the appropriate access type for the role:

- Super Admin Access
- Technician Access
- Customer Access
- All Lead Access

Module Permissions

Select the modules that the role should have access to.

Available modules include:

- Dashboard
- Work Order Management
- Finance Management
- Inventory Management
- Settings
- Main Menu
- Manage
- Main Master
- Internal

Configure Permissions

For each module, assign the required permissions by selecting the appropriate privileges.

The available permissions include:

- List
- Add
- Edit
- View
- Delete
- Download

Assign permissions based on the responsibilities of the role.

After configuring the required permissions, click **Save** to create the role.

Note: Users assigned to a role will inherit all permissions configured for that role. Any changes made to the role permissions will automatically apply to all users assigned to that role.

3.5 Deactivate Users

The **Deactivate User** feature allows administrators to temporarily disable an office staff account without permanently deleting it. Deactivated users cannot log in to QuikFSM until their account is reactivated.

Navigate to:

Explore → Users

To deactivate an office staff account:

1. Navigate to the **Users** list.
2. Locate the user you want to deactivate.
3. Click **Edit** for the selected user.
4. In the **Status** section, change the status from **Active** to **Inactive**.
5. Click **Update** to save the changes.

Once the account is deactivated, the user will no longer be able to access QuikFSM using their existing login credentials.

To reactivate the user, edit the user record, change the status back to **Active**, and click **Update**.

Note: Deactivating a user does not delete the user's information or transaction history. All assigned records and historical data remain available in the system.