

**fieldd**

**Onboarding Manual**  
**Adding admin and fieldd staff users**

# Welcome to fieldd!

We are excited to have you onboard, the following guide is to support your fieldd setup for both admin and field staff.

It's time to take control of your operations and become an industry leader.

Let's get started!

**fieldd**

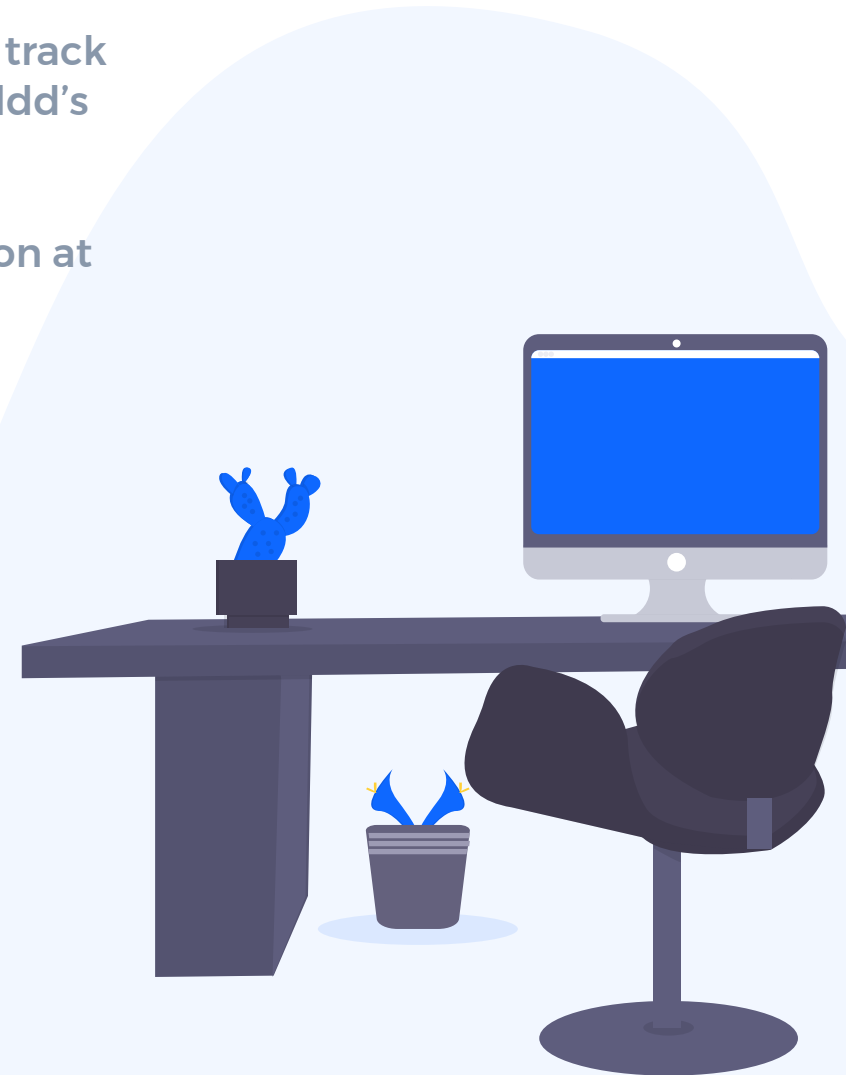


# Administrative Access

As an administrator of your fieldd CRM, you have administrative rights to view and edit your CRM portal.

Here you can save customer details, manage and add staff, keep track of payments, setup your online booking portal, and access all fieldd's customisable features.

Team members who spend time on office admin have automation at their fingertips, exporting reports, managing integrations with accounting software, view and edit booking details, customer management and marketing tools.



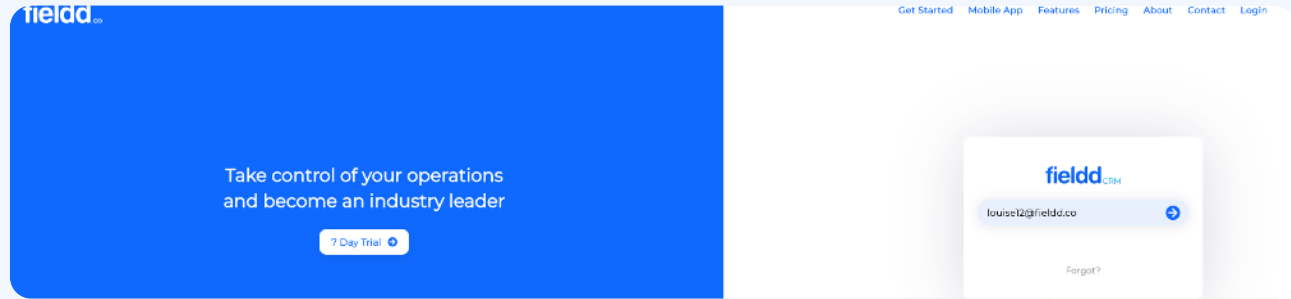
# Assigning Administrative Access

- 1) Login to your CRM
- 2) Click on staff/ admin staff
- 3) +Add
- 4) Fill out the data fields, and save
- 5) To edit the staff profile or delete, click on “i” icon next to a staff member’s name

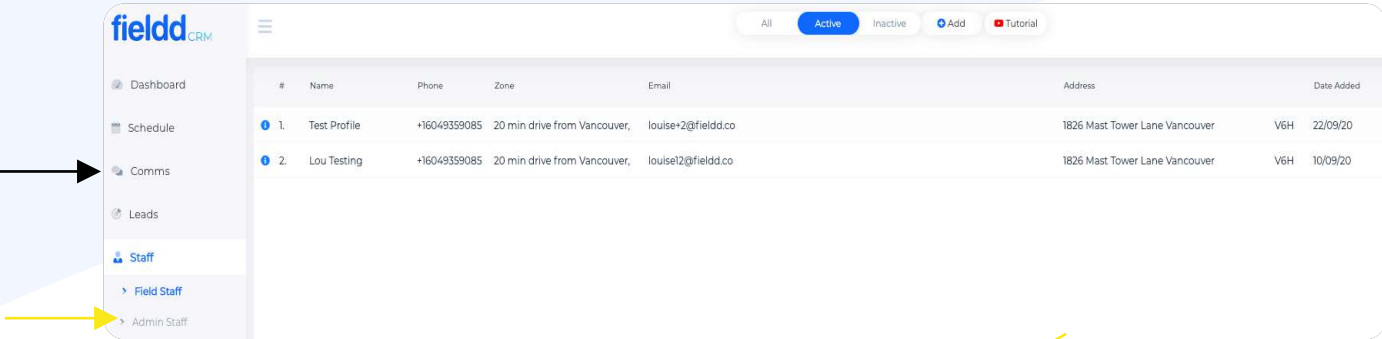
## Note:

Added staff will receive a branded email notification that they have been added to the system

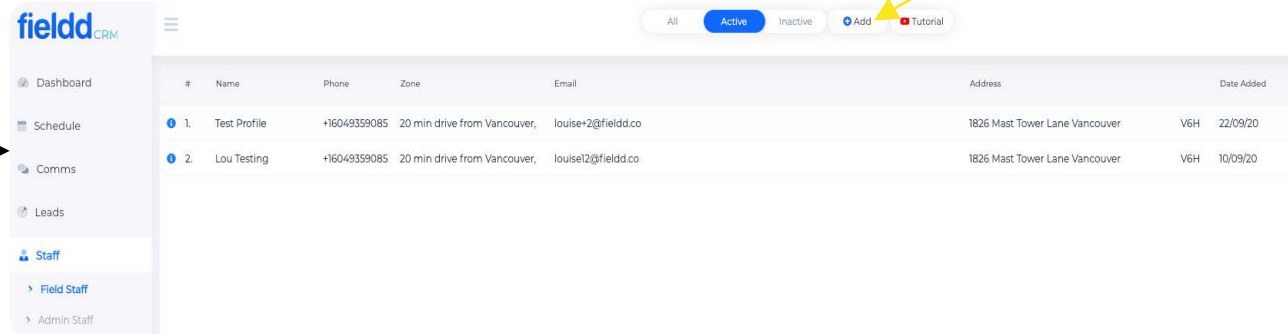
Step 1:



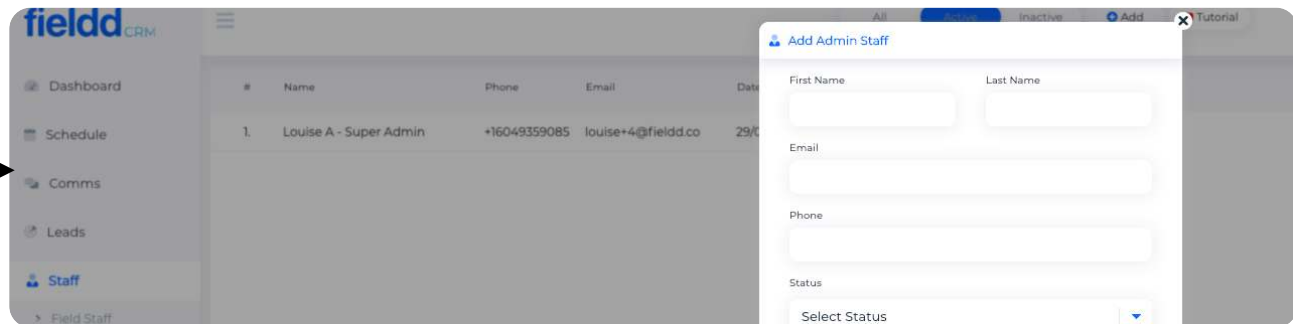
Step 2:



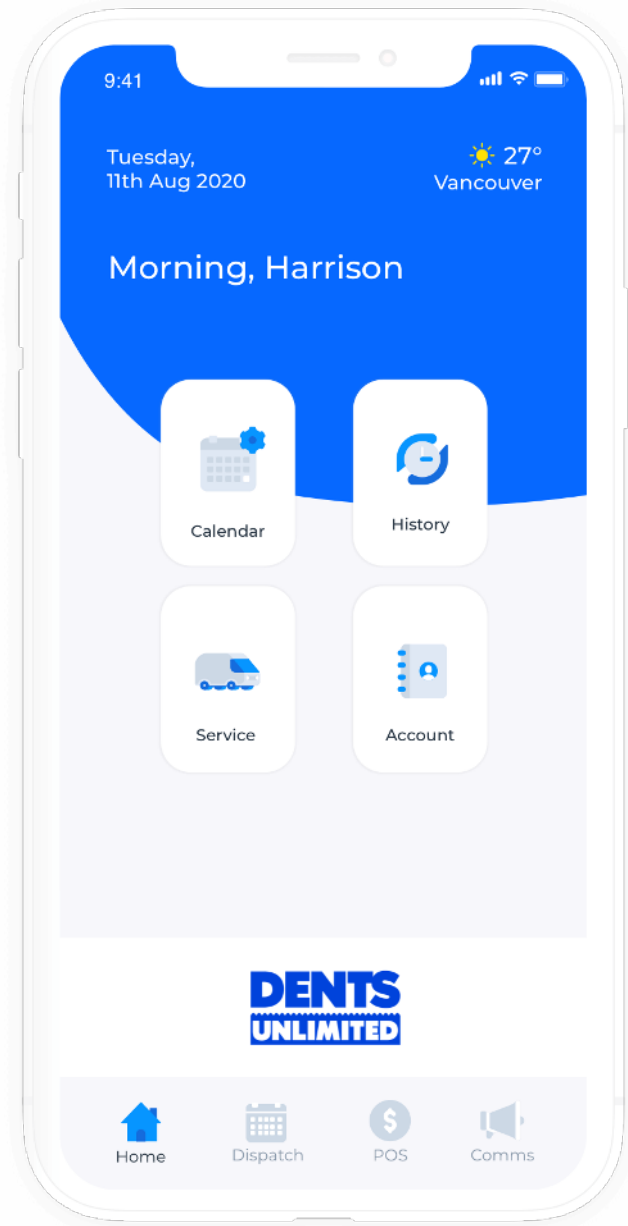
Step 3:



Step 4:



# Field Staff App Access



Your field staff will have access to all the information they need to perform their role including inbuilt job notes, photos, and checklists.

They have access to their dispatched jobs, manage their schedule and mobile point of sale from the field.

# Assigning staff to fieldd's Staff App

- 1) Login to your CRM
- 2) Click on staff/ field staff
- 3) Click +Add
- 4) Fill out the data fields
- 5) Assign operational zone under "setup" - add city and then operation zone
- 6) Add services qualified for, select all or individually select
- 7) Save

## Note:

Added staff will receive a branded email notification that they have been added to the system with a link to download the app

# fieldd staff - How to login to the staff app

1. When your fieldd staff have been added in the crm they will receive a welcome email with a link to download the staff app
2. Tap login and input your email address. As a first time user you will be prompted to generate a password
3. Login



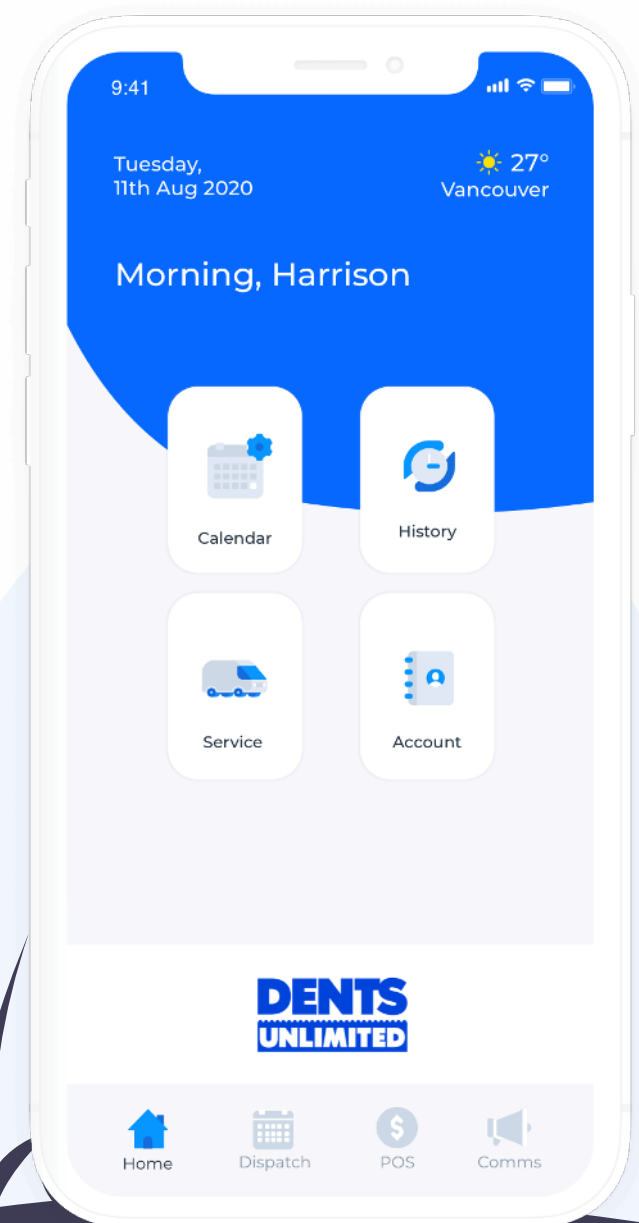


# What you need to know

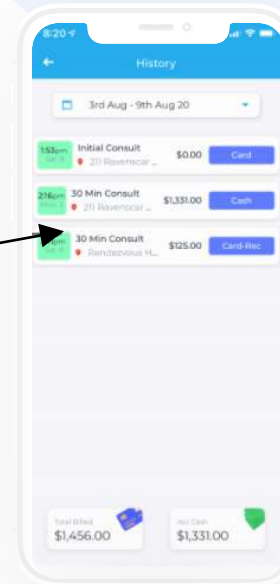
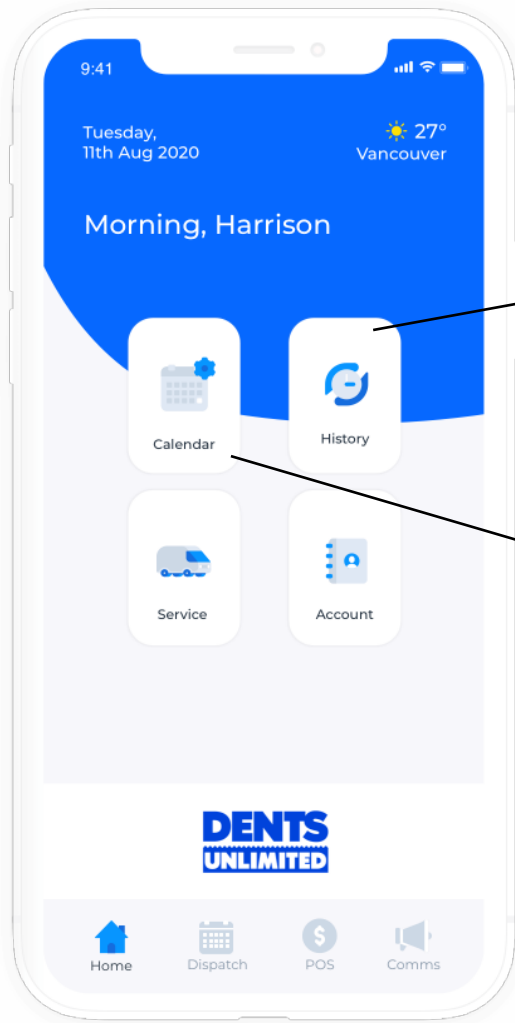
This is the Service App, here your field staff will check their job schedule, job history, a list of their services, their work zones as well as update profile information.

In the 'Comms' tab your staff member will be able to communicate with the admin team live.

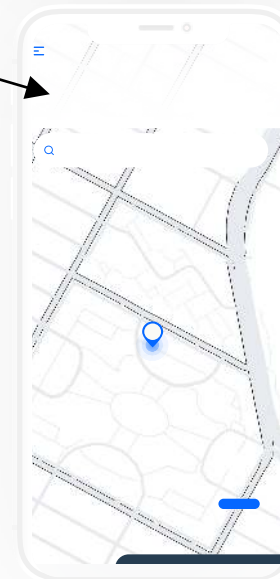
The Dispatch tab is where you will see scheduled jobs in chronological order, as well as overdue jobs and on-demand jobs to be accepted (if turned on in CRM)



# Updating Calendar, Schedule and View Job History

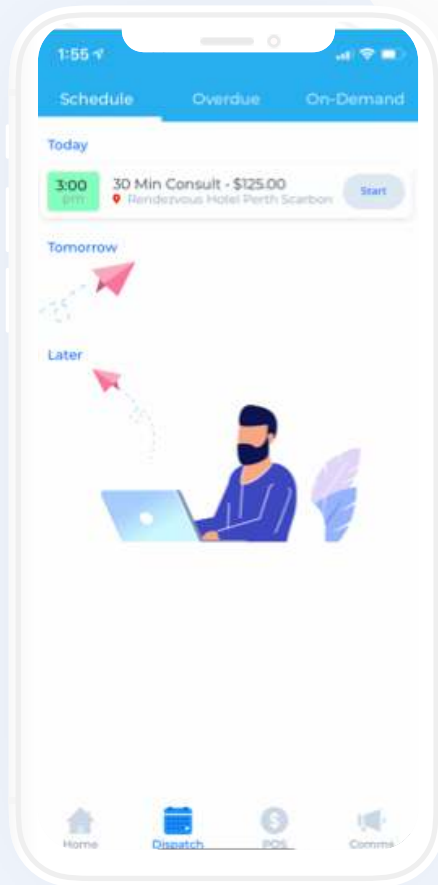


1. Staff can view their job history, payments and job details

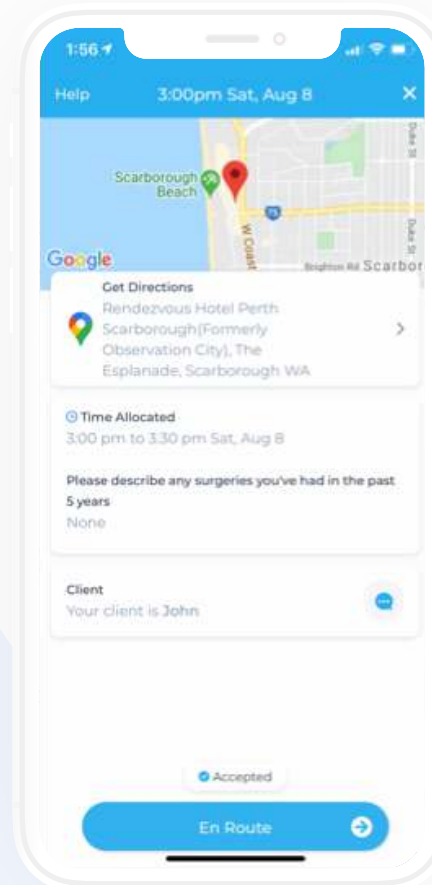


2. The calendar allows your staff to sync their field jobs with their personal google calendar. The schedule tab is where the contractor manages their hours of work and their time off.

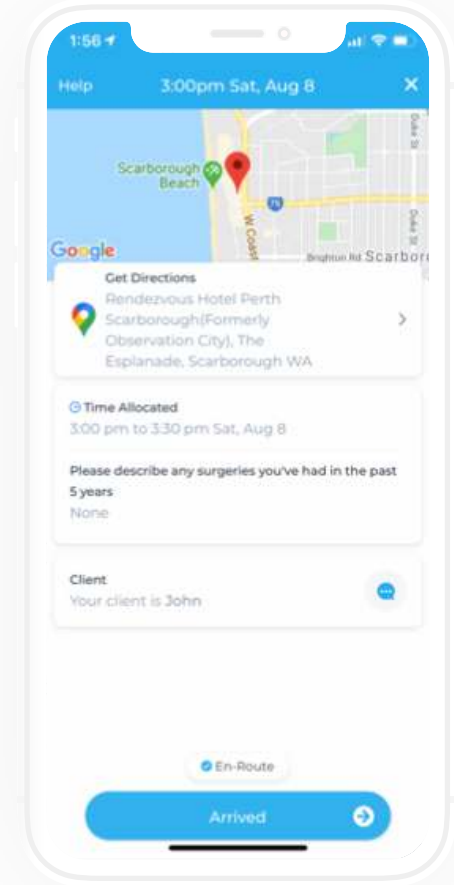
# Accepting, Starting and Completing Jobs



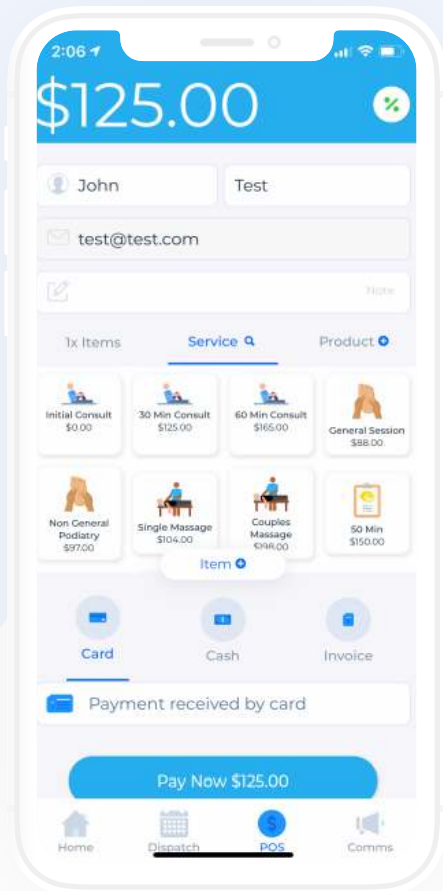
To start your first job click 'start'



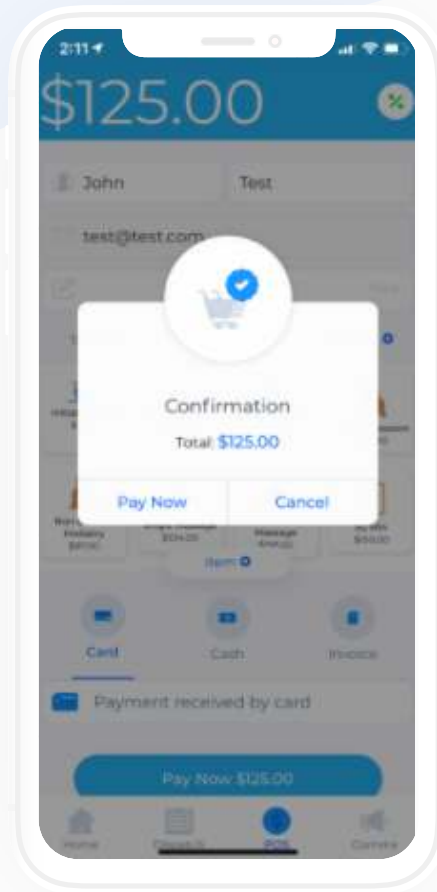
Job details, extra information and map directions are available at your staff's finger tips



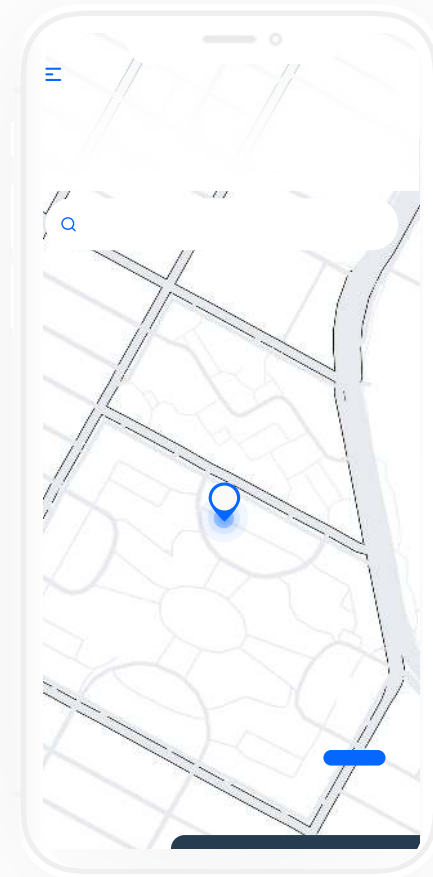
When at the job, click and hold the arrived button, continue through next steps of



Once job is completed the job will take you to POS, carrying over the job details



You have the ability to add extra add ons or charges before billing



Once billed by card, cash or invoice the customer will receive an instant invoice/receipt. Completing the job