

QuikOne FSM

User Guide - Explore Section

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1. About This Manual

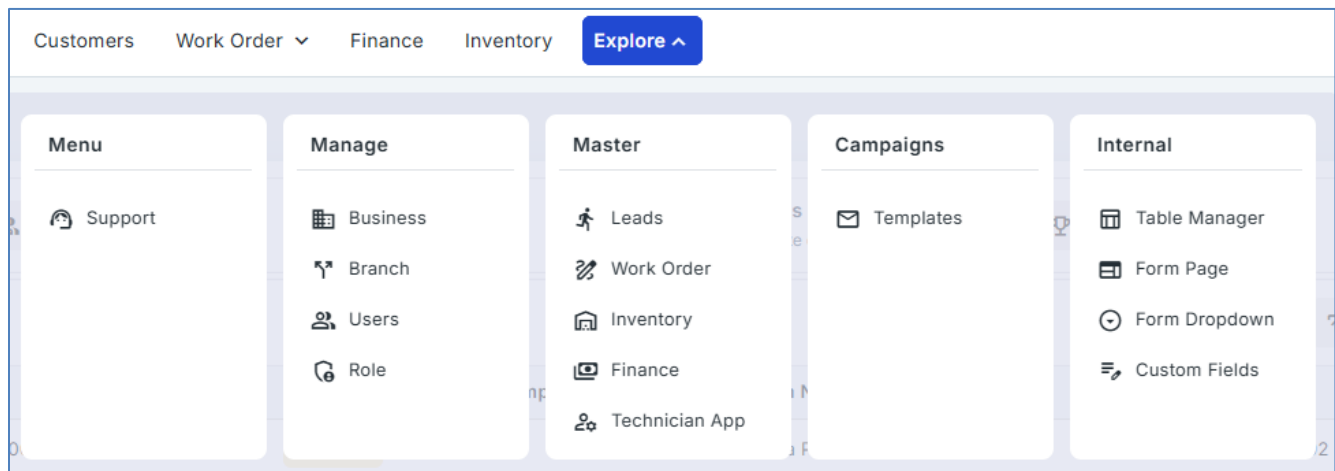
This manual explains the configuration and administration options available under the Explore section of QuikOne FSM. It is intended for tenant administrators and users who are responsible for setting up business data, user access, service masters, communication templates, and configurable forms.

The manual focuses on the information that users may need to understand before using a screen. Common controls such as Search, Add, Save, Cancel, pagination, and column sorting are not described individually unless their use affects the configuration.

1.1 Explore Menu

The Explore section is organized into five groups:

Group	Menus covered
Menu	Support
Manage	Business, Branch, Users, Role
Master	Leads, Work Order, Inventory, Finance, Technician App
Campaigns	Templates
Internal	Table Manager, Form Page, Form Dropdown, Custom Fields



2. Menu – Support

2.1 Support

Support allows a tenant user to raise a support ticket with the QuikOne Support team when assistance is required with the application.

Create Ticket

Basic Information

Ticket Title *

Short description of your issue

Category *

Select

Priority

Medium

Related Module (Optional)

Select

Device / Browser

Example: Chrome on Windows

Page URL (If Applicable)

Example: /work-orders/create

Description & Details

Description *

[Undo] [Redo] [Bold] [Italic] [Underline] [Text Color] [Background Color] [List Bulleted] [List Numbered] [Link] [Unlink] [Indent Left] [Indent Right] default Times New Roman 3 Clear Class [Fullscreen] [Exit Fullscreen] [Code] [Table] [Image]

Start typing here...

Create a Support Ticket

1. Enter a short and meaningful Ticket Title describing the issue.
2. Select the Category that best matches the issue, such as Bug Report, Feature Request, Performance Issue, UI / UX Issue, or Login & Authentication.
3. If applicable, select the Related Module so the support team can identify the affected area.
4. Enter the Device / Browser information when the issue may be related to the user's environment.
5. If the issue occurs on a specific page, enter the Page URL.
6. Provide a clear Description. Include what was expected, what actually happened, and any relevant steps to reproduce the issue.
7. Attach screenshots or supporting files when they help explain the issue.
8. Select the appropriate Priority and submit the ticket.

After Submission

After the ticket is submitted, a unique Ticket ID is generated. The ticket is sent to the QuikOne Support team for review and resolution. The tenant can use the ticket reference when communicating with the support team. Once the support team resolves or updates the ticket, the corresponding information is made available to the tenant.

3. Manage – Business

3.1 Business

Business is used to maintain the tenant's Business Types. Business Types can be used to identify the nature of the services or operations handled by the tenant.

Add a Business Type

- Business Type Name – Enter the name that should appear when a business type is selected elsewhere in the application.
- Status – Keep the business type Active when it is available for selection. Use the available inactive status when it should no longer be used.

Save the record after entering the required information. Maintain separate business types when the tenant operates different service categories or business areas that need to be identified separately.

4. Manage – Branch

4.1 Branch

Branch is used to maintain the tenant's operational branches. Branch information is used as a reference for users, technicians, operational settings, communication, localization, and branch-level processing.

Branch Information

- Country, Name and Code identify the branch. The branch code should be maintained consistently because it is used as the branch's short identifier.
- Branch Type identifies whether the branch is the main branch or a sub branch.
- The Main Branch option identifies the primary branch when applicable.

Branch Contact

Maintain the contact person's name, email, phone number, default dial number, WhatsApp number, and alternative phone number as applicable. These details provide the branch's operational contact information.

Branch Address

Enter the branch address and select the applicable State, City, PIN/ZIP Code and Time Zone. The time zone is particularly important for schedules and time-based operations.

Communication & Setup

- From Email is used as the branch's configured sender address where applicable.
- CC and BCC allow additional email recipients to be configured for applicable communications.

- Enable Notifications controls the communication channels available for the branch, including Mail, SMS and Push Notification.

Default Assignment Settings

Use the Lead Assigned setting to define the default assignment behavior for leads where applicable.

Default Localization

Set the branch Currency, Date Format and Time Format according to the branch's operating region.

Prefix Settings

Maintain document prefixes such as Invoice, Quotation, Receipt, Refund, Credit Note and Proforma prefixes. These prefixes are used when the corresponding document numbers are generated.

Operational Comments and Logo

Operational Comments can be used to store branch-specific notes. Upload the branch Logo when the branch's branding needs to appear in supported documents or screens.

Branch Setup Guidance

Create the branch before assigning users or other branch-dependent configuration. Review the time zone, communication settings and document prefixes before the branch begins operational use.

4.2 Business Hours

Business Hours defines the working availability of a branch. The settings can be used by scheduling and other time-sensitive functions that need to know when the branch is open.

Edit Business Hours

Business Working Hours

Day	Status	Start Time	End Time
Monday	☒ Open	HH:mm 🕒	to HH:mm 🕒 🗑️
+ Add Hours			
Tuesday	☒ Open	HH:mm 🕒	to HH:mm 🕒 🗑️
+ Add Hours			
Wednesday	☒ Open	HH:mm 🕒	to HH:mm 🕒 🗑️
+ Add Hours			

- Each day can be set as Open or Closed.
- For an open day, enter a Start Time and End Time.
- Use Add Hours when the branch has more than one working period in the same day, such as a morning and evening shift.
- Remove an unnecessary time slot when it is no longer part of the branch's working hours.

Ensure that the configured time slots do not overlap and that the end time is later than the start time.

4.3 Public Holidays

Public Holidays is used to define non-working holidays for a branch.

Add Public Holidays

 Public Holidays

Holiday Name *

Holiday Date *



Description

Status

Active

▼

Cancel

Save

- Holiday Name – Enter the name of the holiday.
- Holiday Date – Select the date on which the holiday occurs.
- Description – Add additional information when required.
- Status – Keep the holiday Active when it should be treated as an applicable holiday. Maintain holidays for the correct branch so that branch-specific working calendars remain accurate.

5. Manage – Users

5.1 Add User

Users is used to create user accounts for people who need access to the tenant application.

Add User

Basic Information

First Name*
Last Name
Email*

Password*
Phone Number*
Alternative Phone Number

Additional Information

Branch*
Default Branch
Role*

Default Role
Employee Id
Joining Date

Status
Active

Comments

Basic Information

- First Name and Last Name identify the user.
- Email is used as the user's email identity.
- Password is configured when the account is created.
- Phone Number and Alternative Phone Number provide the user's contact details.

Additional Information

- Branch determines the branch associated with the user.
- Default Branch identifies the branch used by default when the user works across multiple branches.
- Role determines the permissions available to the user.
- Default Role can be used to identify the user's default role where applicable.
- Employee ID can be used to associate the account with the organization's employee identifier.
- Joining Date records the user's joining date.
- Status determines whether the user is active.

Comments can be used for internal notes, and a supporting file can be attached when required.

Before Saving

Confirm that the user's branch and role are correct. The role is important because it determines which modules and actions the user can access.

6. Manage – Role

6.1 Add Role

Roles are used to control what users can access and which actions they can perform in QuikOne FSM.

Add Role

Role Name*

Role Name

Role Code*

Role Code

Status

Active

Default Redirect

Dashboard

Super Admin Access

Technician Access

Customer Access

All Lead Access

Modules

Select All

Dashboard

Lead Management

Customer Management

Dashboard Permissions

PRIVILEGES	LIST	ADD	EDIT	VIEW	DELETE	DOWNLOAD
Dashboard (Module)	☐					
Lead	☐	☐	☐	☐	☐	☐

Role Details

- Role Name – Name of the role.
- Role Code – Short code used to identify the role.
- Status – Controls whether the role is available.
- Default Redirect – Defines the initial page to which users assigned this role are directed.

Access Options

The role screen provides higher-level access options such as Super Admin Access, Technician Access, Customer Access and All Lead Access. Enable an option only when the role should receive the corresponding level of access.

Module Permissions

Module permissions allow the administrator to control access at a more detailed level. For each module or privilege, permissions can be provided for actions such as List, Add, Edit, View, Delete and Download.

Select only the permissions required for the user's job responsibility. This keeps access aligned with the role instead of giving every user unrestricted access.

Recommended Setup

1. Create the role.
2. Set the required high-level access options.
3. Select the applicable modules.
4. Configure the required privileges for each module.
5. Save the role.
6. Assign the role when creating or updating the relevant user.

7. Master – Leads

7.1 Lead Phases

Lead Phases defines the stages through which a lead progresses. The phase sequence is used to represent the lead lifecycle in the application.

Maintain stages such as Leads, Pipeline, Deals, Won and Lost according to the tenant's sales process. The sequence should represent the actual progression of a lead from initial creation through its final outcome.

7.2 Lead Source

Lead Source identifies where a lead originated, such as a website, referral, campaign or other business channel. Maintain the sources that the tenant wants users to select when recording leads.

7.3 Lead Status

Lead Status provides the status values used to describe the current condition of a lead. Maintain statuses that are meaningful to the tenant's lead management process.

8. Master – Work Order

8.1 Work Order Phases

Work Order Phases controls the stages displayed in the Work Order process. The configured stages represent the navigation or progression of the Work Order workflow.

Work Order Stage						Search...
☐		Workorder Stage Name	Workorder Stage Code	Status	Created At	
☐		Customer	Create Customer	Active	15-09-2026, 12:48 pm	
☐		Request	Create Request	Active	15-09-2026, 12:48 pm	
☐		Quotations	Create Quotations	Active	15-09-2026, 12:48 pm	
☐		Work Order	Create Work Order	Active	15-09-2026, 12:48 pm	
☐		Scheduler	Create Scheduler	Active	15-09-2026, 12:48 pm	
☐		Reports	Reports	Active	15-09-2026, 12:48 pm	
				Items per page:	10	1 - 6 of 6

Maintain the phases in the sequence in which the organization expects users to work. The configured order should match the operational workflow used by the tenant.

8.2 Company Type

Company Type maintains the company-type values used where company classification is required. Add only the classifications that the tenant actually uses.

8.3 Service Hub

Service Hub is used to create service hubs and associate technicians with the appropriate operational hub. This helps users identify technicians through the relevant service hub when creating or assigning a Work Order.

Add Service Hub

Hub Name*

Enter Hub Name

Hub Code*

Enter Hub Code

Hub Manager*

Select

Hub Location*

Select Hub Location

Status

Active

Description

Enter Description

Cancel

Save

- Hub Name and Hub Code identify the service hub.
- Hub Manager identifies the person responsible for the hub.
- Hub Location identifies where the hub operates.
- Status controls whether the hub is available for use.
- Description can be used to record additional information.
- Technicians assigned to the hub become associated with that hub for technician selection and assignment activities.

8.4 Service Setup

Service Setup allows the tenant to configure a complete service hierarchy on one page: Service Category, Service Type and Service Charges.

Service Category

Create the broad service category and provide a description. The category groups related service types.

Service Type

Within a category, add the service types that users may select when defining or processing a service.

Service Charge

Within each service type, define the applicable service charges. A charge can have a name, charge code, unit type, price, description and status.

This structure allows the tenant to maintain the relationship between a category, its service types and the charges that can be applied to those services.

8.5 Service Category

Service Category provides the category-level values used in service configuration.

8.6 Service Type

Service Type provides the individual services under the configured service categories.

8.7 Service Charge

Service Charge maintains the charges associated with services, including the charge name, code, unit type and price.

8.8 Warranty Type

Warranty Type maintains the warranty classifications used in the application.

8.9 Contract Type

Contract Type maintains the contract classifications used when creating and managing customer contracts.

9. Master – Inventory

The Inventory masters provide the reference data required for maintaining products, materials and stock-related processing. Configure the master values before creating inventory transactions so that users can select consistent information throughout the system.

9.1 Inventory Master Data

Use the Inventory section to maintain the tenant's item-related reference information, including the classifications and units required by the inventory process.

- Item / Product information should identify what is being stocked or used.
- Category and Brand provide classification for items.
- Base Unit defines the unit used for stock tracking.
- Purchase Unit can be used where items are purchased in a different unit from the stock-tracking unit.
- Conversion information should be maintained when one purchase unit represents multiple base units.
- Cost and selling-price information should be maintained where pricing is required.
- Reorder Level can be used to identify when replenishment is required.
- Where supported, tracking options such as batch, expiry, rack/bin or box tracking should be configured according to the tenant's operational needs.

Only configure tracking options that the tenant actually uses. Consistent master data is important because inventory transactions depend on these values.

9.2 Inventory Configuration Guidance

Before users start inventory transactions, ensure that the required categories, units, products/materials and related reference values are available. Changes to master values should be made carefully when existing transactions already use those values.

10. Master – Finance

Finance masters provide the configuration values used by financial documents and transactions.

10.1 Tax

Tax configuration is used to maintain the tax details applicable to the tenant's business. The tenant can create and manage the required tax details from Explore → Finance → Tax.

Configure the tax information according to the tenant's operating region and invoicing requirements. The configured tax details are used by the application when applicable financial documents are generated.

Add Tax

Tax Name*

Tax Name

Tax Code*

Tax Code

Tax Rate *

Tax Rate

Tax Type *

Percentage

Description

Description

Status

Active

☐ State Based

Cancel

Save

10.2 Other Finance Master Values

Use the remaining Finance master screens provided by the application to maintain the reference values required by the tenant's invoicing and payment processes. Maintain these values before users begin creating financial transactions.

Where a financial master contains codes, names, percentages, payment classifications or status values, use consistent naming so that users can easily select the correct value during transaction entry.

10.3 Finance Configuration Note

Tax and financial configuration can affect generated documents. Review the tenant's regional tax requirements before activating the corresponding configuration.

11. Master – Technician App

Technician App masters control information that is used by the field technician application. These settings help determine the additional information technicians capture while attending and completing Work Order schedules.

11.1 Custom Attribute

Custom Attribute is used to create custom input forms for the Technician App. It can be used for activities such as Pre Checklist, Post Checklist, Installation and other technician activities that require structured information to be captured.

Add Custom Attribute

Attribute Details

Attribute Name*
Attribute Name

Related To*
Related To

Attribute Description
Attribute Description

Status
Active

Attribute Type*
Attribute Type

Questions + Add Question

S.No	Question Type*	Question*	Answer	Mandatory	Action
1	Select	Question	Answer	☐	

Cancel Save

- Select the appropriate Attribute Type for the activity.
- Define the custom inputs that the technician needs to complete.
- Use the configured attribute when the corresponding technician workflow requires that information.
- The submitted information becomes part of the technician's Work Order activity record.

11.2 Reason Type

Reason Type provides the reason values that a technician can select when the Technician App requires a reason while attending or updating a Work Order..

Maintain reason values that clearly describe the operational situations for which a technician may need to provide an explanation.

12. Campaigns – Templates

12.1 Templates

Templates is used to manage communication templates used by QuikOne FSM. The available template types are Email, SMS and System.

12.2 Email Templates

Email templates are used for email communications generated by the application.

Add Custom Attribute

Attribute Details

Attribute Name*

Attribute Name

Related To*

Related To

Attribute Description

Attribute Description

Status

Active

Attribute Type*

Attribute Type

Questions

+ Add Question

S.No	Question Type*	Question*	Answer	Mandatory	Action
1	Select	Question	Answer	☐	

- Template Name identifies the template.
- Template Subject defines the email subject.
- Template For determines whether the template is intended for a Client or Internal User.
- CC and BCC can be configured when additional recipients are required.
- Status controls whether the template is active.
- Content contains the email message and can be formatted using the available editor.

When creating or modifying a template, ensure that the content is appropriate for the event for which the template will be used. Where the application provides supported placeholders, retain the placeholder syntax so that dynamic information can be populated.

12.3 SMS Templates

SMS templates are used for SMS-based communications. Maintain the message content according to the application's supported SMS configuration and any applicable tenant requirements.

12.4 System Templates

System Templates are predefined templates supplied with the application for standard system communications and documents.

A tenant can update a system template when customization is required. Before modifying a system template, review its purpose and existing dynamic placeholders. Removing or changing required placeholders may prevent the system from populating information correctly.

Updating a System Template

1. Open the required system template.
2. Review the existing subject and content.
3. Make only the required wording or formatting changes.
4. Retain system placeholders used to populate dynamic information.
5. Save the template and verify the resulting communication or document where applicable.

13. Internal – Table Manager

Table Manager provides configuration for how selected application data tables are presented and mapped.

13.1 Table Mapping

- Mapping Table Name identifies the application table being configured.
- Alternate Table Name defines the alternate name used for the configured table.
- Business Type associates the configuration with a business type.
- Enable Row Selection controls whether users can select rows.
- Clone Table can be used when a similar table configuration needs to be duplicated.

13.2 Column Configuration

Each mapped column can be configured with its mapping key, alternate key, label, field type and filter type. Header and CSS class settings can be used when the table requires presentation customization.

Row Click Type controls what happens when a user selects a row. Additional options can control behaviors such as Download, Sortable, Filterable and visibility-related functions, depending on the configured table.

Configuration Guidance

Table Manager is an advanced configuration screen. Change mappings only when the administrator understands the underlying table and the intended user experience. Incorrect mappings can affect the way data is displayed or interacted with.

14. Internal – Form Page

Form Page is used to create dynamic forms. The available Form Types include Lead Form, Requirement Form and Customer Form.

The screenshot displays the 'Edit Form Page' interface, which is divided into several sections for configuring a dynamic form.

Form Configuration Section:

- Form Name:** Tenant Requirement Form Pest
- Form Code:** RFP
- Form Type:** Requirement Form (dropdown menu)
- Branch:** Al Rasa Pest Control and Bui... (dropdown menu)
- Set as Default:** A checkbox that is currently checked.

Fields Configuration Section:

- Default:** A table for defining field properties.

Label	Name
First Name	first_name
- Placeholder:** First Name
- Field As Dynamic:** A checkbox that is currently unchecked.
- Control:** Normal (dropdown menu)
- Group Array Name:** normal
- Style:**
 - Height:** 40 px
 - Group Class:** form-group col-md-
 - Input Class:** form-control form-cr
 - Label Class:** Label Class

Form Layout Section:

- Property Details:**
 - Type Of Property:** Select (dropdown menu)
 - Approximate Property Size:** Enter Approximate Property Si (text input)
 - Number Of Floors:** Number of Floors (text input)
 - Any Pets On The Property:** Select (dropdown menu)
 - Specific Areas Affected:** Select (dropdown menu)
- Services:**
 - Services Category:** Select (dropdown menu)
 - Service Type:** Select (dropdown menu)
 - Types Of Pest:** Select (dropdown menu)
 - Severity Of Infestation:** Select (dropdown menu)
 - Preferred Treatment Method:** Select (dropdown menu)

14.1 Form Details

- Form Name identifies the dynamic form.
- Form Code provides the form's code.
- Form Type determines where the form is used.
- Branch associates the form with the applicable branch.
- Set as Default makes the configured form the default form where applicable.

14.2 Fields Configuration

The Fields Configuration area is used to define the fields that can be inserted into the dynamic form. Configure the field label, name, placeholder and other available field properties according to the information the form needs to capture.

14.3 Form Layout

Form Layout controls how the configured fields are arranged into sections and groups. Use the layout to organize related questions together so that users can complete the form logically.

14.4 Creating a Dynamic Form

1. Create the form and select the required Form Type
2. Associate the form with the applicable branch.
3. Configure the fields that the form needs to capture.
4. Arrange the fields into logical sections in the Form Layout.
5. Set the form as default when it should be used as the standard form.
6. Save the configuration and verify the form in the relevant application workflow.

15. Internal – Form Dropdown

Form Dropdown is used to create dropdown lists for dynamic forms. Dropdowns can be configured for Lead Form, Requirement Form and Customer Form.

Add Form Dropdown

Dropdown Name*

Form Type*

Dropdown Name

Select

Business Type*

Select

Add Dropdown option

Label	Value	Action(s)
Label	Value	

Cancel

Save

15.1 Dropdown Details

- Dropdown Name identifies the dropdown.
- Form Type determines which dynamic form uses the dropdown.
- Business Type associates the dropdown with the relevant business type.

15.2 Dropdown Options

Each dropdown option has a Label and Value. The Label is the text presented to the user, while the Value represents the configured value associated with that selection.

1. Enter the dropdown name.
2. Select the Form Type and Business Type.
3. Add the required options.
4. Enter a clear Label and corresponding Value for each option.
5. Arrange the options in the required order.
6. Remove obsolete options when necessary.
7. Save or update the configuration.

Dropdown configuration should be completed before building or finalizing a dynamic form that depends on those options.

16. Internal – Custom Fields

Custom Fields allows the tenant to add additional fields to standard application forms when the standard fields do not capture all required information.

16.1 Supported Areas

The Type selection determines where the custom field is used. The available types shown on the screen are Customer, Request, Work Order and Schedule.

16.2 Custom Field Details

- Name identifies the custom-field configuration.
- Type determines the application area in which the field is used.
- Description explains the purpose of the custom field.
- Status controls whether the configuration is active.

16.3 Sub Fields

Sub Fields define the individual inputs that appear in the selected form.

- Field Name – identifies the input.
- Field Type – determines the kind of value the user enters or selects.
- Field Value – provides the configured value where applicable.
- Placeholder – gives the user guidance inside the input.
- Visibility – controls whether the field is displayed.
- Mandatory – controls whether the user must provide a value.

16.4 Creating a Custom Field

1. Enter the Custom Field details.
2. Select the required Type.
3. Add the required sub fields.
4. Configure the field type and placeholder.
5. Set Visibility and Mandatory according to the business requirement.
6. Save the configuration.
7. Verify the custom field in the corresponding Customer, Request, Work Order or Schedule form.

17. Recommended Explore Setup Sequence

For a new tenant, the following sequence provides a practical order for configuring the Explore section. The exact sequence may vary depending on the tenant's enabled modules and business process.

1. Create the required Business Types.
2. Create branches and configure Business Hours and Public Holidays.
3. Create Roles and configure the required permissions.
4. Create Users and assign the correct Branch and Role.
5. Configure Lead Phases, Lead Sources and Lead Statuses.
6. Configure Work Order phases and the required service setup.
7. Create Service Hubs and associate the appropriate technicians.
8. Configure Inventory master data.
9. Configure Finance and Tax information.

10. Configure Technician App attributes and reason values.
11. Review Email, SMS and System Templates.
12. Configure dynamic forms, dropdowns and custom fields where required.
13. Use Table Manager only for approved advanced table configurations.

18. Administration Guidelines

- Use clear and consistent names for master values so users can identify the correct option easily.
- Keep inactive values for historical reference when they are already used by existing records, rather than creating unnecessary duplicates.
- Review branch time zone, business hours and holidays whenever a new branch is created.
- Assign users only the permissions required for their responsibilities.
- Test dynamic forms after changing fields, dropdowns or custom fields.
- Do not remove system placeholders from templates unless their purpose is understood.
- Review financial and tax configuration carefully before generating live documents.
- Make advanced Table Manager changes only with a clear understanding of the affected table and workflow.

19. Quick Reference – Explore Menu

Group	Menu	Primary Purpose
Menu	Support	Raise and track support requests with QuikOne Support
Manage	Business	Maintain Business Types
Manage	Branch	Manage branches, working hours and public holidays
Manage	Users	Create and maintain application users
Manage	Role	Define user access and permissions
Master	Leads	Configure lead phases, sources and statuses
Master	Work Order	Configure work order stages, services, hubs and related masters
Master	Inventory	Maintain inventory-related master data
Master	Finance	Maintain finance and tax-related configuration
Master	Technician App	Configure technician-side attributes and reason values
Campaigns	Templates	Manage Email, SMS and System templates
Internal	Table Manager	Configure advanced table mappings and presentation
Internal	Form Page	Create dynamic forms
Internal	Form Dropdown	Create dropdown values for dynamic forms
Internal	Custom Fields	Add additional fields to standard forms