

REQUIREMENT STUDY: WHAT IS YOUR REQUIREMENTS

# MOBILEERP

SERVICE MANAGEMENT

[www.mobileerp.in](http://www.mobileerp.in)

PH: 9925789204

# REQUIREMENT STUDY SHEET

## SYSTEM REQUIREMENTS CHECKLIST

FRONT OFFICE		MIDDLE OFFICE		BACK OFFICE	
END USER		EXECUTION USER		ADMIN USER	
A	FIX METHODS OF TICKET GENERATION	B	FIX METHODS TO EXECUTE TICKET WORKS	C	FIX TICKET BASED PROCESS WORKFLOWS
<b>1</b>	<b>Generate Support Tickets</b>	<b>Required</b>	<b>1</b>	<b>Execute Work for Ticket</b>	<b>Required</b>
a	Via Email	Y/N	a	EMAIL/CB/WP/MA TO TICKET GENERATION	Y/N
b	Via ESS - Web Portal	Y/N	b	TICKET WORK PROGRESS UPDATE	Y/N
c	Via Chatbot	Y/N	c	UPLOAD PROOF OF WORK	Y/N
d	Via Mobile App	Y/N	d	ENTER MATERIAL USED/TIMESHEET	Y/N
<b>2</b>	<b>Ticketing Applications</b>	<b>Required</b>	<b>2</b>	<b>Identify Helpdesks to solve tickets</b>	<b>Required</b>
a	Plant Maintenance Support	Y/N	a	Plant Maintenance Helpdesk	Y/N
b	IT - Computer Support	Y/N	b	IT Support HelpDesk	Y/N
c	AMC Customer Support	Y/N	c	Customer Support Helpdesk	Y/N
d	Training Support	Y/N	d	Training Helpdesk	Y/N
e	Machinery Maintenance	Y/N	e	Machinery Maintenance Helpdesk	Y/N
f	Conference Room Booking	Y/N	f	Secretary Service Helpdesk	Y/N
g	Asset Requirement Support	Y/N	g	Asset Management Helpdesk	Y/N
h	Travel Ticket Booking Support	Y/N	h	Ticket Booking Helpdesk	Y/N
i	Material Requirement Support	Y/N	i	Material Supply Helpdesk	Y/N
j	Travel Expense Support	Y/N	j	Expense Approval Heldesk	Y/N
<b>1</b>	<b>Execute Work for Ticket</b>	<b>Required</b>	<b>1</b>	<b>Execute Work for Ticket</b>	<b>Required</b>
a	DEFINE WORKPLACE	Y/N	a	DEFINE WORKPLACE PROCESS	Y/N
b	DEFINE WORKPLACE PROCESS	Y/N	b	DEFINE WORKPLACE RESPONSIBILT	Y/N
c	DEFINE WORKPLACE DASHBOARDS	Y/N	c	DEFINE WORKPLACE DASHBOARDS	Y/N
<b>2</b>	<b>Ticket Execution Process</b>	<b>Required</b>	<b>2</b>	<b>Ticket Execution Process</b>	<b>Required</b>
a	Plant Maintenance Process	Y/N	a	Plant Maintenance Process	Y/N
b	IT Support Process	Y/N	b	IT Support Process	Y/N
c	AMC Repair/Relace Process	Y/N	c	AMC Repair/Relace Process	Y/N
d	Training Process	Y/N	d	Training Process	Y/N
e	M/c Maintenance Process	Y/N	e	M/c Maintenance Process	Y/N
f	Conf Room Booking Process	Y/N	f	Conf Room Booking Process	Y/N
g	Asset Allocation Process	Y/N	g	Asset Allocation Process	Y/N
h	Ticket Booking Process	Y/N	h	Ticket Booking Process	Y/N
i	Material Supply Process	Y/N	i	Material Supply Process	Y/N
j	Expense Approval Process	Y/N	j	Expense Approval Process	Y/N

# A. REQUIREMENT 1: FIX METHODS OF TICKET GENERATION

## Generate Service Tickets via various Methods

How Tickets can be generated?.

1. Customer Scanning QRCode of product



0. EMAIL

2. Customer entering it from website/chatbot



3. Manual entry by HelpDesk at company when phone, email or whatsapp received.



4. Against Service Contract

- AMC
- CMC
- Warranty



FREE  
Business Design

### HVAC SERVICE ORDER INVOICE

1001

YOUR COMPANY NAME HERE  
123 Main Street  
YOUR TOWN, STATE and ZIP  
Phone 123-4567

METHOD OF PAYMENT		UNIT	UNIT	CHECK LIST
<input type="checkbox"/> CASH	DRIVER'S LIC NO. _____	MAKE _____	MAKE _____	<input type="checkbox"/> COMPRESSOR
<input type="checkbox"/> CHECK	_____	MODEL _____	MODEL _____	<input type="checkbox"/> MOTOR _____ PSI
<input type="checkbox"/> CREDIT CARD	<input type="checkbox"/> MC <input type="checkbox"/> VISA <input type="checkbox"/> AMEX	SERIAL NUMBER _____	SERIAL NUMBER _____	<input type="checkbox"/> HEAD _____ PSI
EXP. DATE _____		ENVIRONMENTAL CHECKLIST		<input type="checkbox"/> VOLTS _____ AMP
CC NO. _____				<input type="checkbox"/> ELECTRICAL CONNECTIONS
				<input type="checkbox"/> CONTACTS TIGHT & CLEAR
				<input type="checkbox"/> OIL LEVEL & CONDITION
				<input type="checkbox"/> CONDENSER COIL

NAME \_\_\_\_\_

STREET \_\_\_\_\_

CITY \_\_\_\_\_

PHONE (HOME) \_\_\_\_\_ PHONE (WORK) \_\_\_\_\_

TECHNICIAN \_\_\_\_\_

WORK TO BE PERFORMED \_\_\_\_\_

RECOMMENDATIONS \_\_\_\_\_

#### My Documents

Insert New TICKET Document

DESCRIPTION: \_\_\_\_\_

CUSTOMER: \_\_\_\_\_

INVOICE NO: \_\_\_\_\_

ORDER NO: \_\_\_\_\_

WARRANTY CARD: \_\_\_\_\_

STAFF: \_\_\_\_\_

DATE: \_\_\_\_\_

Under Warranty - Service Due Date Report for the month of May , 2015 Date:01/07/2015

SR NO.	CUSTOMER NAME	INST DATE	MACHINE NAME	AREA	ADD1	ADD2	ADD3	CITY	1ST SERVICE	2ND SERVICE	3RD SERVICE	4TH SERVICE	SERVICE NO
1	AAYUSHI SAREE	08/05/2015	5 STAR 1.5 TR BLUE STAR WINDOW AC -5W18GA	RING ROAD	2148.	NTM MARKET	RING ROAD	SURAT	08/08/2015	08/11/2015	08/02/2016	08/05/2016	4
2	APARNA SHAH	27/05/2015	3 STAR 1.0TR SPLIT AC 3-HW-12-FA-1	PARLE POINT	811.	VIRAT AALISHAN APPT.	ATHWAGATE	SURAT	27/08/2015	27/11/2015	27/02/2016	27/05/2016	4
3	APEKSHABEN RAJENDRA JOSHI	26/05/2015	5 STAR 1.5 TR MITSUBISHI MS-GK-18VA	PANDESARA	P-21, VISHNU NAGAR -1	GUJARAT HOUSING BOARD	PANDESARA	SURAT	26/08/2015	26/11/2015	26/02/2016	26/05/2016	4
4	ASHWINBHAI C MEHTA	29/05/2015	5 STAR 1.5 TR SPLIT AC BLUE STAR 5-HW-18-SA-1	PARLE POINT	49, SANKALP SOC.	NEAR JAMUNA NAGAR, BH. ST. XAVIERS SCHOOL	GHODDOD ROAD	SURAT	29/08/2015	29/11/2015	29/02/2016	29/05/2016	4

# A. REQUIREMENT 2: FIX SUPPORT ESS IT HELPDESK FORMATS

The screenshot displays the MobileERP Support Management interface. The top navigation bar includes the MobileERP logo, user profile (ASHISH G. KANTAWALA / Computer), and various notification icons. The left sidebar lists navigation options such as My Manpower Req, My Purchase Req, My Self Service, Field Service, Budget, Expenses, Attendance, Leave, Payroll, Benefits, Career, Training, and Support. The main content area is divided into three panels:

- Request for Support:** Features a 'Ticket/Issues Summary' table and a form for creating a new ticket.
- SelfHelp FAQ Search:** Includes a search bar with the text 'How to access ERP' and a 'Find' button. Below the search bar, it displays '7 items found...' and a list of search results.
- SelfHelp Chatbots:** Displays a list of 'Service Chatbots' categorized by type.

Raised	Solved	Pending
10	2	8

Search Results
Staff accounts & access
How to access email
Setup VPN Cloud Access
Login does not work
Screen or systems hang
Show all problems faced
Problems in installation


Hardware Related
Software Related
Access Related
Asset Related
Problems Related
SLAs Related
<a href="#">Customer Request</a>
<a href="#">Field Service</a>

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# B. REQUIREMENT 1: FIX METHODS TO EXECUTE TICKETS

☰ MobileERP

28 7424 0 0 0 0 0 0

 IMPLEMENT

🌐 ESS \_ ☐ ✕

## Field Service Management - Dated: 1st Feb 2020 - Hourly View

Technician 1	Customer X	Customer Y	Customer Z
Technician 2	Customer P	Customer Q	Customer R
Technician 3	Customer A	Customer B	Customer C

12:00 :30 13:00 :30 14:00 :30 15:00 :30 16:00 :30 17:00 :30 18:00 :30 19:00

### Work For Today

**Ticket/Issues Summary**

Raised	Solved	Pending
10	2	8

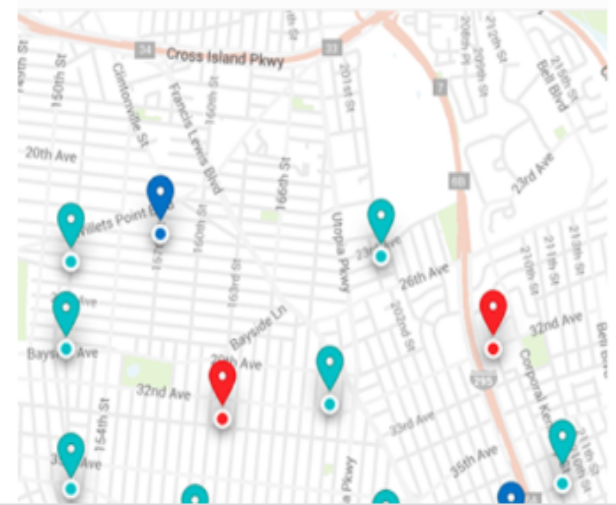
CUSTOMER	APPOINTMENT	CHECKIN	CHECKOUT
CUSTOMER X Repair	12 TO 14	In	OUT
CUSTOMER Y Diagonise	14 TO 16	In	OUT
CUSTOMER Z Install	16.30 TO 19	In	OUT

### Inventory For Today

Required:  QTY:

MATERIAL TOOLS	NEEDED QTY	HAVE QTY	TAKE FROM STORE
SCREW DRIVER KIT	1	0	1
AC GAS CM	70	20	50
SCREW 2 INCH	50	20	30
DRILL MACHINE	1	1	0

### Map View



ASHISH G. KANTAWALA / Computer

FY: 2324 - 07/04/2023

For Help Contact: 871

- ▶ Leave Application
- ▶ My Manpower Req
- ▶ My Purchase Req 0
- ▶ My Self Service
- Field Service
- ▶ Budget
- ▶ Expenses
- ▶ Attendance
- ▶ Leave
- ▶ Payroll
- ▶ Benefits
- ▶ Career
- ▶ Training
- ▶ Support

PMS PROJECT MANAGEMENT SYSTEM

- ▶ 632/HRRL Project
- ▶ 640/HRC Project

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# B. REQUIREMENT 2: FIX METHODS TO EXECUTE TICKETS

The screenshot displays the MobileERP Case/Ticket Management System interface. On the left is a navigation sidebar with categories like ETM ENTERPRISE TASK MANAGEMENT, ERP ENTERPRISE RESOURCE PLANNING, and ESS EMPLOYEE SELF SERVICE. The main content area is titled 'Case/Ticket Management System' and includes a breadcrumb 'Case Manager > Cases'. A 'TICKETS' section has tabs for 'ToDo', 'Unsolved', 'Solved', and 'Lifecycle'. A 'Dynamic Case Management' form is open, allowing users to assign tickets, set recurring status, problem type, status, impact, and priority. Below the form is a 'Work ToDo Message' field and a 'Create' button. At the bottom, a table lists 'All Active Unresolved Cases for this document' with columns for ID, Raised By, Solve By, Date, Subject, Message, and Delays.

**Dynamic Case Management Form Fields:**

- Ticket Assigned To:
- Recurring:
- Problem:
- Type:
- Status:
- Impact on:
- Priority:
- Subject/Case/Ticket/Work Title:
- Work ToDo Message:

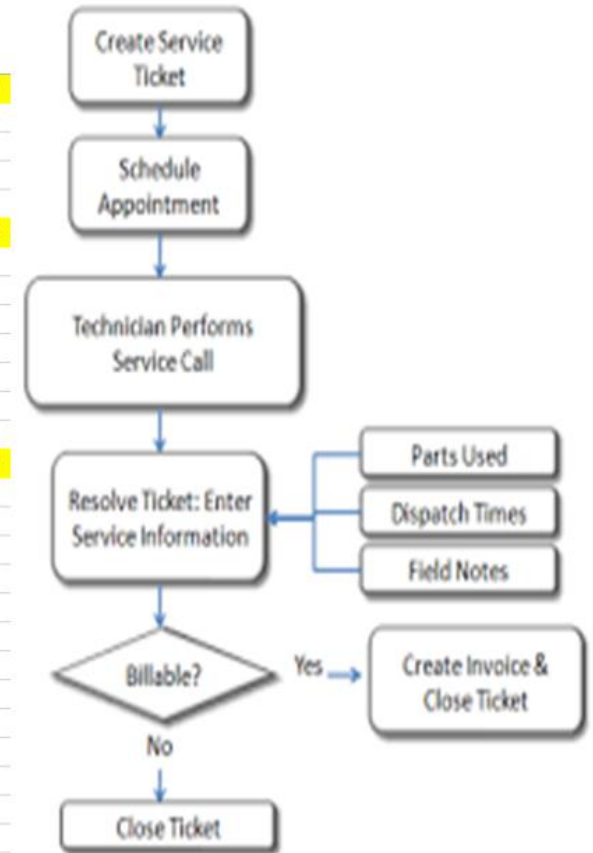
**All Active Unresolved Cases for this document**

#	ID	Raised By	Solve By	Date	Subject	Message	Delays
1	22	NIRAV N. MEHTA	NIRAV N. MEHTA	24/03/2021 10:58:08	SCRUM TEST	TESTING SCRUM THINGS AGAINST MEETINGS	747
2	62	NIRAV N. MEHTA	NIRAV N. MEHTA	03/01/2023	test ticket 3/1/2023	test ticket 3/1/2023	97
3	67	NIRAV N. MEHTA	NIRAV N. MEHTA	03/01/2023 14:57:35	test case 5 on 3/1/2023	test case 5 on 3/1/2023	97

# C. REQUIREMENT 1: FIX TICKET BASED WORKFLOW

## MobileERP Service Ticket based Flow Types

TYPE 1	CHARGEABLE SERVICE WITHOUT ADVANCE	USER	SERVICE	TYPE 5	SERVICE AGAINST WARRANTY	USER	SERVICE
	TICKET ENTRY	POST10	Installation Service		TICKET GENERATION	POST10	Warranty
	TICKET EXECUTION	POST5	Installation Service		TICKET EXECUTION	POST5	Warranty
	INVOICE ENTRY	POST10	Installation Service		FREE REPAIR PARTS REPLACED	POST5	Warranty
	COLLECTION ENTRY	POST10	Installation Service				
	RECEIPT VOUCHER	POST14	Installation Service				
TYPE 2	CHARGEABLE SERVICE WITH ADVANCE	USER	SERVICE	TYPE 6	INHOUSE PAID REPAIR SERVICE	USER	SERVICE
	INVOICE ENTRY	POST10	Installation Service		TICKET GENERATION	POST10	Repair
	COLLECTION ENTRY	POST10	Installation Service		TICKET EXECUTION	POST5	Repair
	RECEIPT VOUCHER	POST14	Installation Service		CHARGEABLE PARTS REPLACED	POST5	Repair
	TICKET ENTRY	POST10	Installation Service		INVOICE ENTRY	POST10	Repair
	TICKET EXECUTION	POST5	Installation Service		COLLECTION ENTRY	POST10	Repair
					RECEIPT VOUCHER	POST14	Repair
TYPE 3	AMC SERVICE AGAINST CONTRACT	USER	SERVICE	TYPE 7	FIELD PAID REPAIR SERVICE	USER	SERVICE
	INVOICE ENTRY	POST10	AMC		TICKET GENERATION	POST10	Repair
	COLLECTION ENTRY	POST10	AMC		TICKET EXECUTION	POST5	Repair
	RECEIPT VOUCHER	POST14	AMC		CHARGEABLE PARTS REPLACED	POST5	Repair
	SERVICE CONTRACT ENTRY	POST10	AMC		INVOICE ENTRY	POST5	Repair
	TICKET GENERATION	POST10	AMC		COLLECTION ENTRY	POST5	Repair
	TICKET EXECUTION	POST5	AMC		RECEIPT VOUCHER	POST14	Repair
TYPE 4	CMC SERVICE AGAINST CONTRACT	USER	SERVICE				
	INVOICE ENTRY	POST10	CMC				
	COLLECTION ENTRY	POST10	CMC				
	RECEIPT VOUCHER	POST14	CMC				
	SERVICE CONTRACT ENTRY	POST10	CMC				
	TICKET GENERATION	POST10	CMC				
	TICKET EXECUTION	POST5	CMC				
	FREE REPAIR PARTS REPLACED	POST5	CMC				



## Field Service Automation

MobileSRM	SERVICE CALL	WO TICKET	PLANNING			DELIVERY	INVOICE	COLLECTIONS
Maintenance Services	Service Call Received against Warranty, Chargeable Calls or Contracts AMC/CMC	WorkOrder Ticket for Call Created against APPROVED Service Call	Call Alloted to available Technician by Service Manager	Technician Accepts Planned Tickets to be Executed	Inventory Prepared for call execution	Technician Executes Tickets and delivers Service	Service Invoice Created for Chargeable Calls or Outside Warranty Calls	Collections against Service Invoice Monitored, Followups and collections done.
ROLES	CUSTOMER/HELPDESK/IOT	SERVICE	SERVICE	TECHNICIAN	TECHNICIAN	TECHNICIAN	SERVICE	SERVICE

# C. REQUIREMENT 2: FIX TICKET BASED WORKFLOW

The screenshot displays the MobileERP interface for user ASHISH G. KANTAWALA. The main dashboard is organized into five vertical columns, each representing a different workflow stage:

- BLUEPRINT**: IMPLEMENT, TODO=3, DOING=0, DONE=33. Description: Blueprint-BPR-Process Mapping & Data Collection.
- MASTERDATA**: IMPLEMENT, TODO=2, DOING=0, DONE=33. Description: Master Setup-Installation, Data Preparation, Migration, Rights.
- FORMS**: IMPLEMENT, TODO=2, DOING=0, DONE=31. Description: Forms/Wireframe-Identify and get Forms Fields freed.
- REPORTS**: IMPLEMENT, TODO=2, DOING=0, DONE=29. Description: ReportList-Identify and get Reports list and formats freed.
- DEVELOPMENT**: IMPLEMENT, TODO=3, DOING=0, DONE=26. Description: Development-Testing, Error Correction & Customization.

The interface includes a top navigation bar with various icons and a left sidebar with menu items like My Dashboard, My Workspace, Erp, Design, Develop, Testprocess, Released, Support, My Tasks, My Tickets, My Timesheet, My Masters, and Payment Request. The bottom of the screen shows the copyright information: © 2023 MobileERP.in Created with SoftRobot.biz.