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Field Technician App – Installation Guide

Overview

This guide provides step-by-step instructions to install and configure the Field Technician App within your organization. The application enables field service teams to manage work orders, assign technicians, and update job status in real time.

Prerequisites

Before installing the application ensure the following:

- An active Microsoft 365 or organizational account
- Access to the required backend system (Dataverse, APIs, or enterprise systems)
- User permissions configured for administrators and technicians
- Internet connectivity for synchronization

Step 1 – Install the Application

1. Open the marketplace listing for the Field Technician App.
2. Select Install or Get It Now.
3. Choose the environment where the application will be deployed.
4. Confirm installation and wait for deployment to complete.

Step 2 – Configure Environment

After installation, connect the application to your backend environment. This may include Dataverse, APIs, or enterprise systems such as ERP or CRM platforms.

Step 3 – Configure User Roles

- Administrator – Manages configuration and system settings
- Dispatcher – Assigns and manages work orders
- Technician – Views assigned tasks and updates job progress

Step 4 – Test the Application

Create a sample work order and assign it to a technician to verify the application is working correctly.

Support

If you encounter issues during installation, contact the support team with the following details:

- Organization name
- Application version
- Description of the issue
- Screenshots if available

Admin installation Guide

Introduction

This guide helps administrators configure and deploy the Field Technician App within their organization.

Prerequisites

Before installation ensure:

- User access permissions are configured
- Backend system integration is available
- Network connectivity is enabled

Application Setup

Step 1 – Install Application

Install the application from the marketplace listing.

Step 2 – Configure Environment

Connect the application to the backend environment.

Possible integrations include:

- Dataverse
- REST APIs
- Enterprise ERP systems

Step 3 – Configure Roles

Define roles such as:

Administrator

- Full access to configuration

Dispatcher

- Assign work orders
- Manage technician schedules

Technician

- View assigned tasks
- Update job status

Step 4 – Configure Notifications

Enable alerts for:

- New work orders
- Job completion
- Escalations