



# FieldVision Implementation Plan

This document is intended to serve as guideline for a successful implementation of FieldVision within your organization. Please fill it out as completely as possible so that we can better assist your organization achieve a quick and successful implementation of FieldVision.

## Roles and Responsibilities

Please fill out the following table by entering the contact information for the people that are going to be assigned to the various roles.

Role	Responsibility	Contact Information
DTSI Software main contact	This person will be responsible for working with Customer's Technical Contact to answer questions all questions related to FieldVision and to guide customer through the process of successfully implementing FieldVision in their organization. This person will be the main point of contact for all customer issues.	Name: To be determined  Email: <a href="mailto:fvhelp@dtsisoftware.com">fvhelp@dtsisoftware.com</a>  Phone: 877-533-8554
Customer technical contact	Customer should designate at least one person to be the technical contact for FieldVision within their organization. This is the person(s) that will work with DTSI Software to ensure a successful implementation of Fieldvision and to ensure ongoing operations are running smoothly.	Name:  Email:  Phone:
Customer billing contact	Customer should designate a person to contact for billing and payment arrangements.	Name:  Email:  Phone:
Field Staff support contact	This person will be responsible for training the end users of their organization on the installation and use of FieldVision. This person is also the point of contact for all FieldVision questions from end users.  Unless a paid support contract between DTSI Software and Customer is signed, this person is an employee or representative of the Customer and is not an employee or representative of DTSI Software.	Name:  Email:  Phone:

## FieldVision Setup Tasks

FieldVision is very easy to setup. However, for larger organizations with lots of properties and users, it can be helpful to assign the following tasks to your staff and to let us know what your desired completion dates are so that we can support your organization to implement FieldVision in your desired timeframe.

Task	Relevant Information	Person Responsible	Desired Completion Date	Actual Completion Date
Initial Fieldvision Organization setup	<p>This is the initial creation of your FieldVision Organization.</p> <p>Please write down the following information in the space provided below for future reference.</p> <p>FieldVision Organization Name:</p> <p>FieldVision Organization Tag:</p>			
Data entry and system configuration	<p>The following information should be entered into Fieldvision before a rolling out FieldVision to all end users.</p> <ul style="list-style-type: none"> <li>• Work Order Types</li> <li>• Service Categories</li> <li>• Service Codes</li> <li>• Properties</li> <li>• Work Groups</li> <li>• Work Orders</li> </ul> <p>You can enter this information into FieldVision in the following ways:</p> <ol style="list-style-type: none"> <li>1. Through the FieldVision app</li> <li>2. Through the FieldVision Management Console</li> <li>3. By creating an Excel spreadsheet and importing the data into FieldVision</li> <li>4. By accessing the FieldVision REST API</li> </ol> <p>Please indicate which method you want to use to perform the initial data entry and system configuration:</p> <p>If you choose to import your data or use the FieldVision REST API please contact DTSI Software for further instructions.</p>			
FieldVision Administrators	(Optional) Please list the users within your organization who will be granted Organization Administrator access. Organization Administrators			

	<p>have access to all features of FieldVision and have access to all data for the Organization. It is recommended that only necessary personnel be granted Organization Administrator (OrgAdmin) access.</p>			
<p>Organization Administrator Training</p>	<p>DTSI Software will conduct a training webinar for all Organization Administrators to review features and functionality of FieldVision as well as best practices and strategies. Topics to include the following:</p> <ol style="list-style-type: none"> <li>1. Application Settings</li> <li>2. Service Categories</li> <li>3. Service Codes</li> <li>4. Work Order Types</li> <li>5. Manage Organizations</li> <li>6. Managing Users</li> <li>7. Sending Messages</li> <li>8. Reporting features</li> <li>9. Managing Work Groups</li> <li>10. Managing Properties</li> <li>11. Managing Work Orders</li> </ol> <p>Please indicate when you would like to have your Organization Administrators trained:</p>			
<p>Field Staff Training</p>	<p>Unless otherwise agreed upon, Customer is responsible for training its field staff on the use of FieldVision. Topics that should be covered are:</p> <ol style="list-style-type: none"> <li>1. How to download Fieldvision</li> <li>2. How to sign up as a new FieldVision user and how to join the Customers Organization</li> <li>3. How to set the desired language</li> <li>4. How to record work against a work order</li> </ol>			

## Service Level Questions

So that we may better service your organization, please answer the following questions.

Question	Answer
Approximately how many properties do you anticipate entering into FieldVision?	
Approximately how many users do you anticipate having within your organization?	
Will you be entering your data with the Fieldvision app or do you want to import your data or use the API?	
Are there any special reports or processes you need to integrate FieldVision with your existing systems?	

## Training Videos

The following YouTube Videos will help your organization become more familiar with FieldVision. Please feel free to direct your users to our YouTube training videos and website at any time.

YouTube Video Channel: FieldVision by DTSI)	URL
FieldVision Introduction	<a href="https://www.youtube.com/watch?v=R6kECtgjynU">https://www.youtube.com/watch?v=R6kECtgjynU</a>
FieldVision Overview	<a href="https://www.youtube.com/watch?v=J2pYPzAUprE">https://www.youtube.com/watch?v=J2pYPzAUprE</a>
FieldVision Sign Up Process	<a href="https://www.youtube.com/watch?v=ROdt6kdp880">https://www.youtube.com/watch?v=ROdt6kdp880</a>
FieldVision Setting up your Organization Part 1	<a href="https://www.youtube.com/watch?v=My033OXful0">https://www.youtube.com/watch?v=My033OXful0</a>
FieldVision Setting up your Organization Part 2	<a href="https://www.youtube.com/watch?v=PWZUGmZsSr0">https://www.youtube.com/watch?v=PWZUGmZsSr0</a>
FieldVision Setting up your Organization Part 3	<a href="https://www.youtube.com/watch?v=XUVzYVk-9ql">https://www.youtube.com/watch?v=XUVzYVk-9ql</a>
FieldVision Getting Started for Field Technicians	<a href="https://www.youtube.com/watch?v=cvmhefdAOgg">https://www.youtube.com/watch?v=cvmhefdAOgg</a>