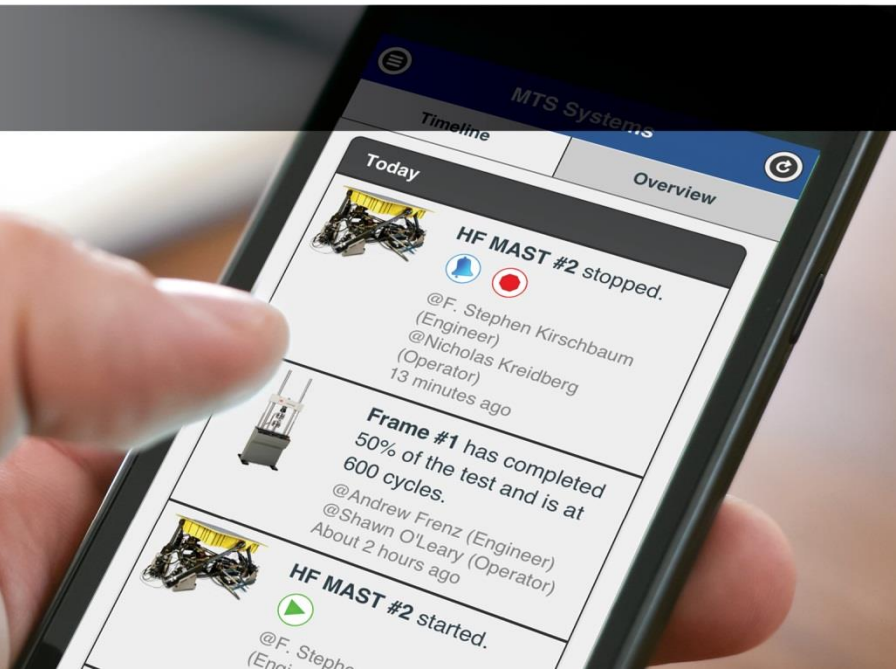




MTS SERVICE SOLUTIONS



Introduction to Zinier Z-Web & Z-Mobile – EU & Asia

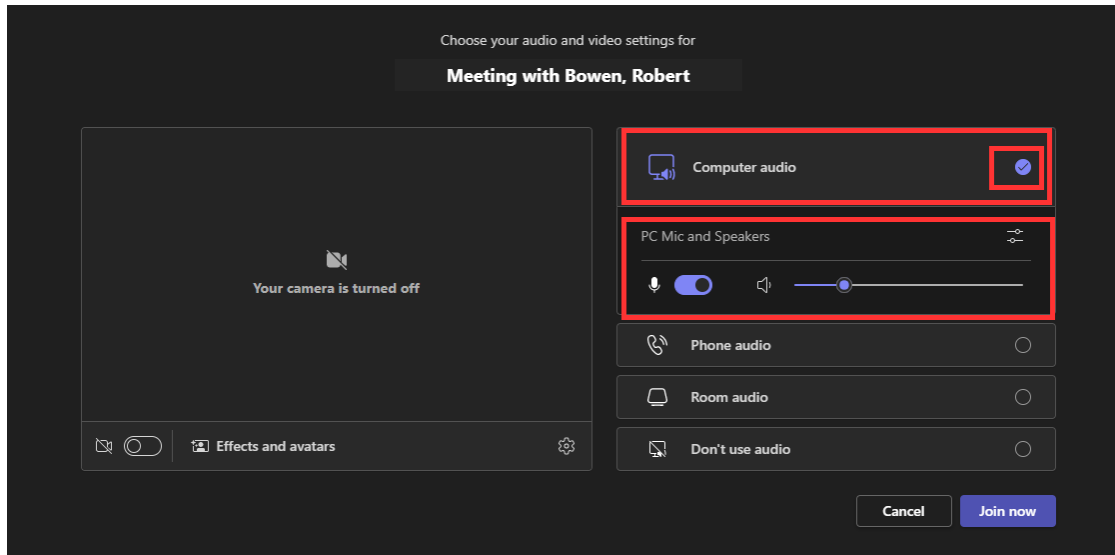
Jessica White & Robert Bowen - October 2023 - Rev. A (45m video)



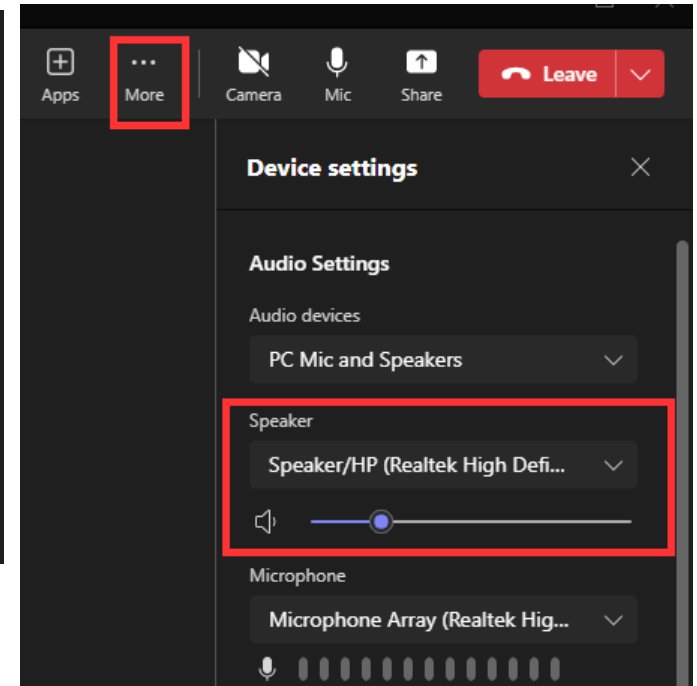
be certain.

Please, turn on your Laptop Speakers.

Prior to Joining the Teams Call....



After Joining the Teams Call....



Introduction - How-To Videos



» The Zinier Training is divided into two presentations:

The 1st presentation:

– An Introduction to Z-Web & Z-Mobile consists of the following:

1. Z-Web – Account activation
2. Z-Mobile – How to Install Z-Mobile on iPad/iPhone
3. Z-Web – How to Schedule a Service Order
4. Z-Mobile – Introduction to the Z-Mobile App
5. Z-Mobile – How to Execute the Service Order/Task on your Mobile Device
6. Z-Web – Attaching a Calibration Report
7. Z-Web – How to Review the Closeout Package
8. Z-Web – How to Submit a Timesheet

Advanced Training - How-To Videos



» The 2nd presentation:

- **Advanced Z-Web & Z-Mobile Training consists of the following:**

“Day 1 – Advanced Training”

1. Z-Mobile – How to Perform RM on an HPU
2. Z-Mobile – Completing a Calibration Task
3. Z-Mobile – Completing an Hourly Task
4. Z-Mobile – Completing an Installation Order
5. Z-Mobile – Completing a Parts Planned Task

“Day 2 – Advanced Training”

1. Z-Web – How to schedule Non-Availability
2. Z-Web – How to Find the Service Order Quote
3. Z-Web – How to Assign one or more tasks to an FSE
4. Z-Web – How to Unschedule a Task

Agenda



- » **Good-Bye Click, Hello Zinier!**
 - Why now?
- » **Zinier | MTS Product Documentation**
 - Where do I find more information?
- » **New Terms & Features**
 - Understanding the terminology
- » **Getting Started**
 - Installing Zinier Mobile and Zinier Web
- » **Introduction to the Z-Web User Interface**
 - Schedule a Service Order – (How-to Videos)
- » **Introduction to the Z-Mobile App**
 - Complete a RM, Calibration and Service Order (How-to Videos)
- » **Questions & Comments**
 - Go Live Dates!

Goals/Expectations

- » At the end of this presentation, you will be able to successfully perform the following:
 - Where to find the Zinier | MTS Online Documentation
 - Understanding the Zinier Terms & Features
 - How-to activate your Zinier Account and log into Z-Web
 - How-to install the Zinier Mobile App
 - How-to Schedule a Service Order (Z-Web)
 - Execute the Service Order on your Mobile Device (Z-Mobile)
 - » Start a task
 - » Assign asset
 - » Create new asset
 - » Complete a Task (Signature Task)
 - Attaching a calibration report and approving the service order (Z-Web)
 - Reviewing the Closeout Package (Z-Web)
 - Submit your Timesheet

Good-Bye Click, Hello Zinier!



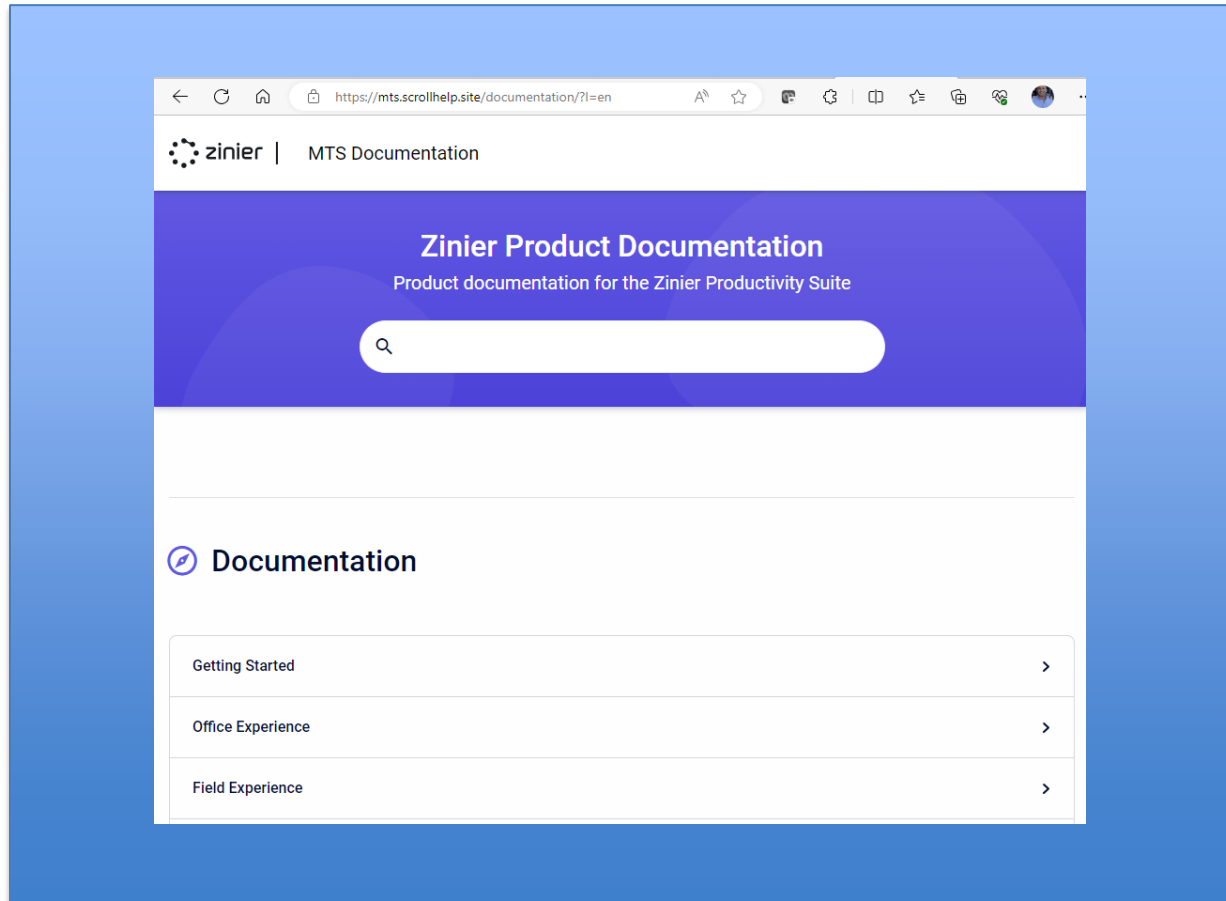
- » ClickSchedule/Mobile will reach it's EOL December 31, 2023

- » In 2020, MTS Evaluated other Service Scheduling Software Solutions
 - SAP – Field Service Management
 - Salesforce – Field Service Lightning
 - **Zinier** was voted for and chosen by our FSE/Management Team

- » **Zinier** is a global company with office locations around the world, including
 - Silicon Valley, California
 - London, UK
 - Lisbon, Portugal
 - India

Zinier | MTS Product Documentation Online

- The **Zinier | MTS** Product Documentation is located online and can be found here: <https://mts.scrollhelp.site/documentation/>
- It is a searchable document and includes How-to Videos



New Terms & Features



» New Zinier Terms & Features:

- Zinier Web App replaces ClickSchedule
- Zinier Mobile App replaces ClickMobile
- We'll refer to the Mobile App as "**Z-Mobile**" and the Web App as "**Z-Web**"
- The Closeout Package replaces the Service Report
- We've simplified it for you by removing the "End of Day", "Needs Action", and "Unplanned" options.
- With Zinier, a task will either be "**Unscheduled**" or "**Scheduled**".
- Quotes will be attached to the service order within Zinier, so everything is in one place!
- Calibration Reports will be attached to the Service Order. The report is included in the Closeout Package that will be sent to the customer.

» We've included MTS Smart Service into Z-mobile!

- No more Android Tablets
- No more RFID Tags
- No more having to sign into another system!
- All Smart Service Routine Maintenance Forms/Checklist is provided in the Z-Mobile App!

Getting Started

» Recommended Browsers and Devices

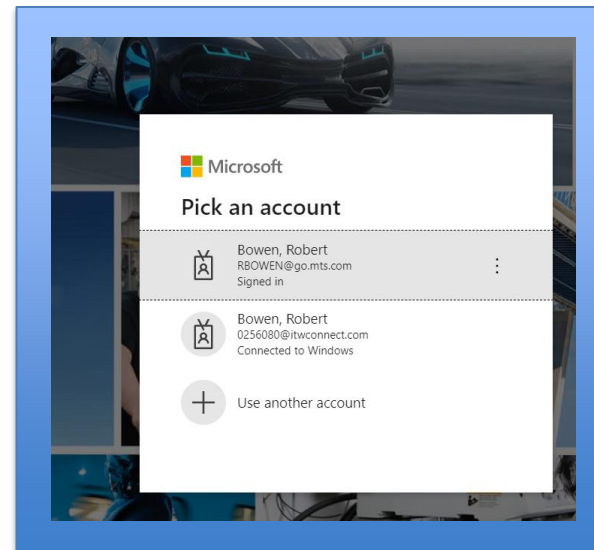
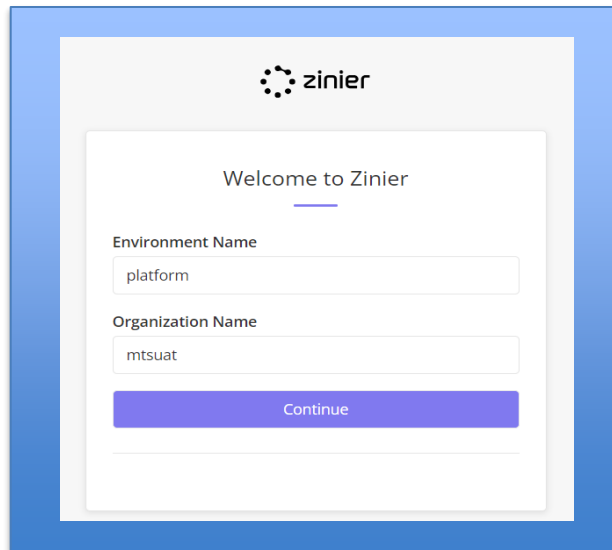
- Zinier Web App is compatible with the following browsers:
 - » **Google Chrome** – Full support for the most current releases. (Mac, Windows 10)
 - » **Microsoft Edge** – Limited support for the most recent stable version. (Mac, Windows 10)
 - » **Safari** – Limited support for the most recent safari release. (Mac)

- Zinier Mobile App is compatible with the following devices:
 - » Android
 - » iOS (iPhone, iPad)

Account Activation and Login Z-Web

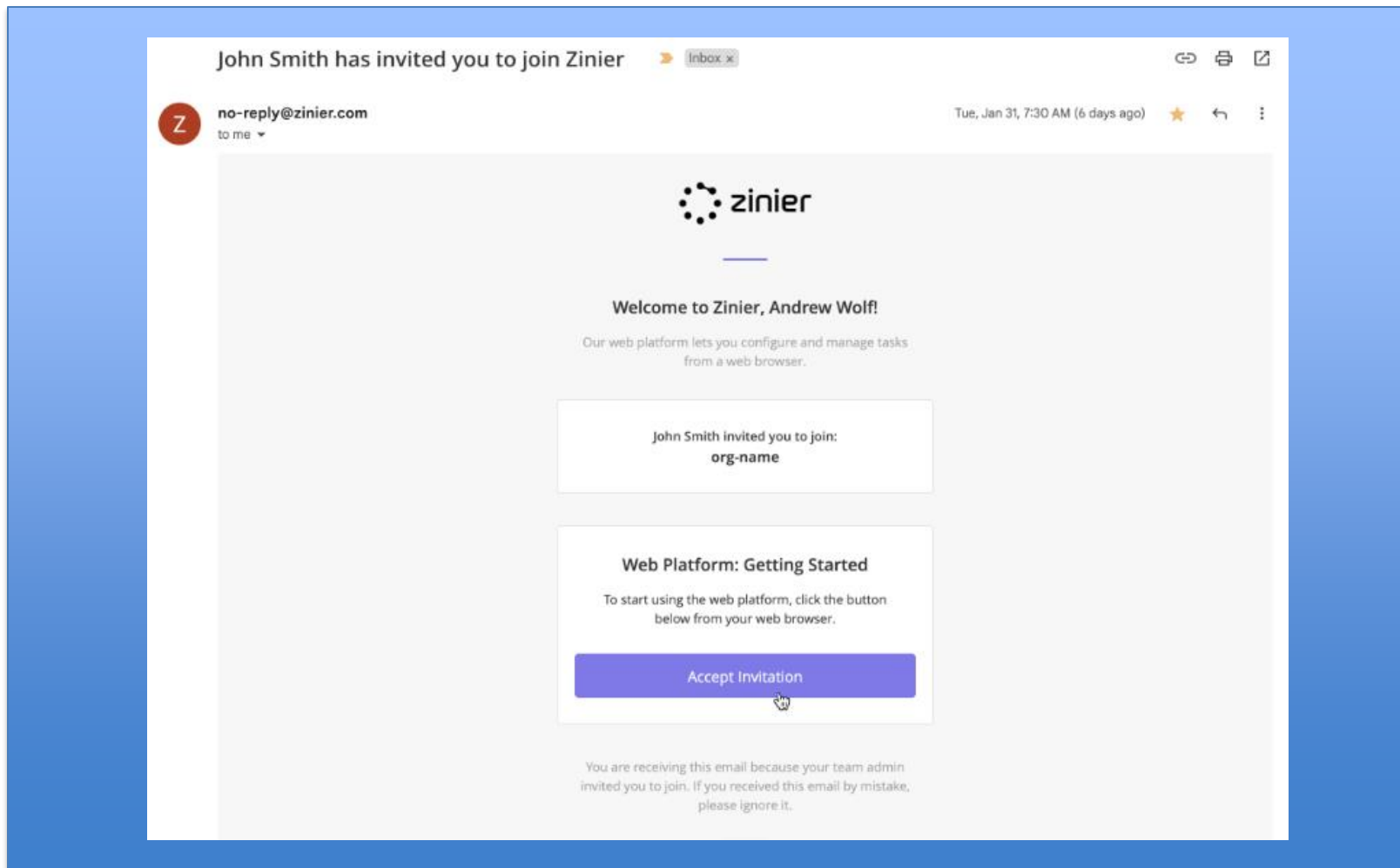
- » After a new user is invited to join Zinier as a web user, they receive an email inviting them to create and activate their account.

- » Step 1: Open the invitation email
 - 1. Enter Organization Name:
 - » For Testing: **mtsuat**
 - » For Production: **mts**



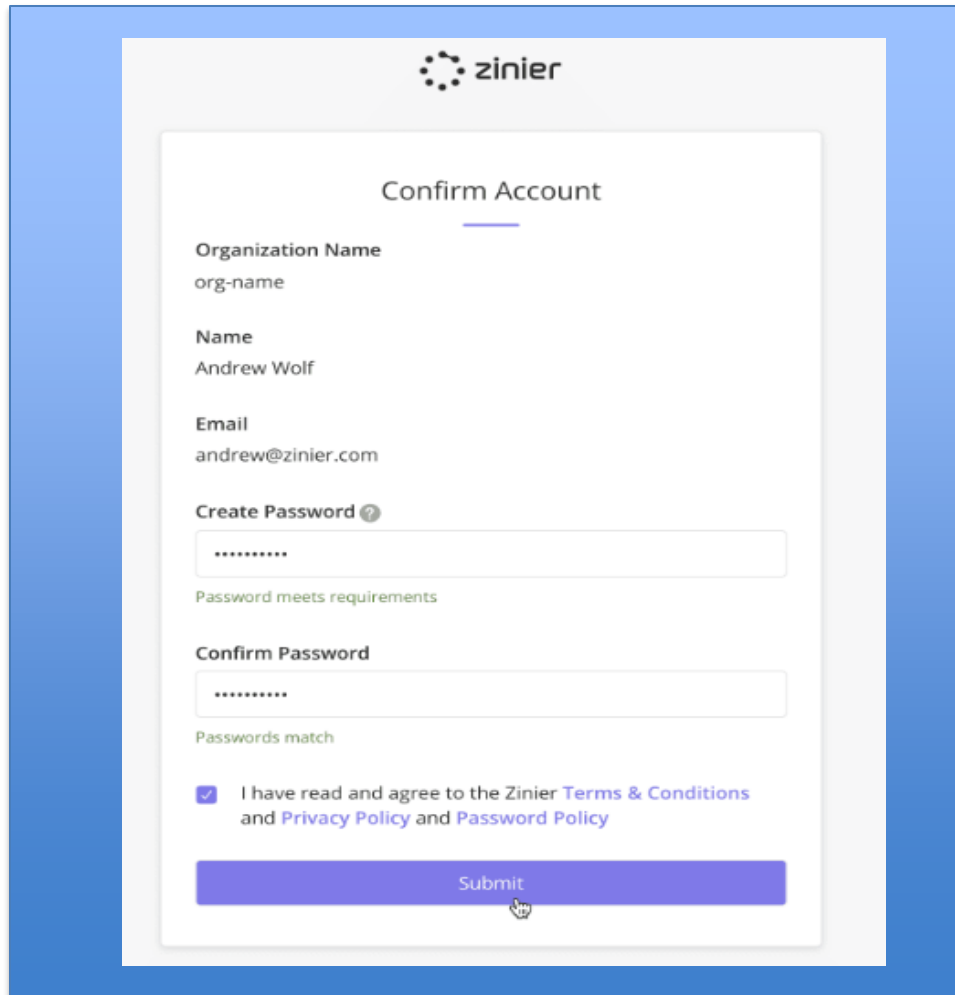
Account Activation and Login Z-Web

2. Click the “Accept Invitation” button in the body of the email



Account Activation and Login Z-Web

Step 2: Create a password to complete your account setup



The screenshot shows a web form titled "Confirm Account" for the Zinier platform. The form is set against a light gray background with the Zinier logo at the top. It contains several input fields and a checkbox. The "Organization Name" field is pre-filled with "org-name". The "Name" field is pre-filled with "Andrew Wolf". The "Email" field is pre-filled with "andrew@zinier.com". There are two password fields: "Create Password" and "Confirm Password", both containing masked characters (dots). Below the "Create Password" field, the text "Password meets requirements" is displayed. Below the "Confirm Password" field, the text "Passwords match" is displayed. At the bottom of the form, there is a checked checkbox and the text "I have read and agree to the Zinier Terms & Conditions and Privacy Policy and Password Policy". A blue "Submit" button is located at the bottom center of the form, with a mouse cursor hovering over it.

zinier

Confirm Account

Organization Name
org-name

Name
Andrew Wolf

Email
andrew@zinier.com

Create Password ?
.....
Password meets requirements

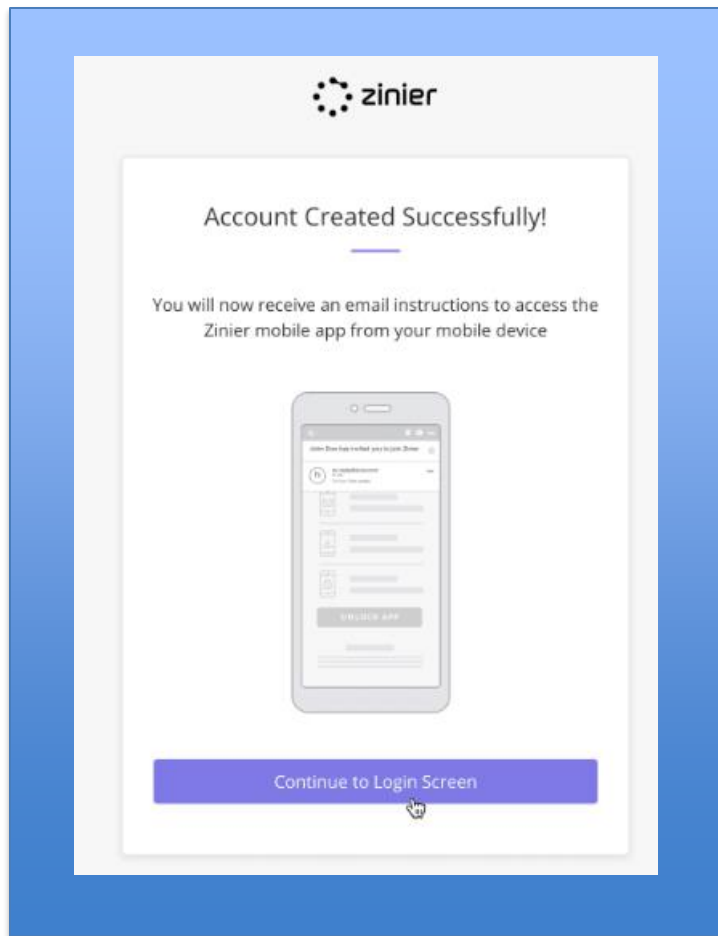
Confirm Password
.....
Passwords match

I have read and agree to the Zinier [Terms & Conditions](#) and [Privacy Policy](#) and [Password Policy](#)

Submit

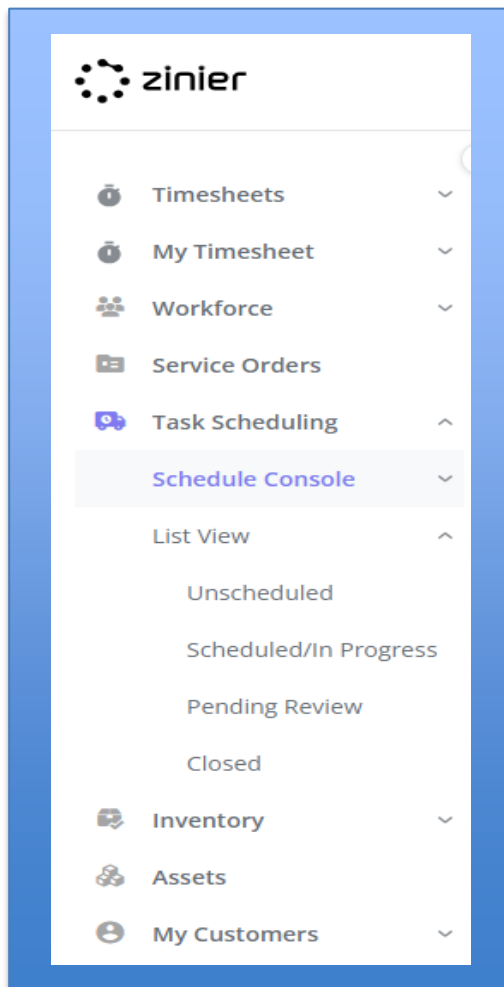
Account Activation and Login Z-Mobile

Step 3: Log in to your account



Z-Web User Interface

The Left Navigation Pane



Timesheets: Displays the FSE's Open and Closed timesheets. Includes the date of the active timesheet along with non-billable and billable hours.

Workforce: Non-availability times such as holidays/vacations and reserving time for upcoming projects will be entered here.

Service Orders: Where to view the top level of a service order. This is also where you can download and view the closeout package for an order..

Task Scheduling: The Task Scheduling module helps coordinators intelligently assign, schedule and dispatch tasks that have been added to a Service Order. It provides both a 'Calendar View' – Gantt Chart and 'Map View' – displays both map/satellite views of all active Service Orders.

The 'List View' – Displays all Unscheduled, Scheduled, Pending Review & Closed Service tasks.

Inventory: Displays the FSE Stock Locations, including Parts and Materials.

Assets: Displays the Customer Sites and amount of assets at each location.

My Customers: Displays the Customer Functional Location, Sold to Name, City and Country.

How-to Video's

- » The following is a list of How-to-Videos that will walk you through process of scheduling a Service Order, assigning a task to an FSE, then completing the service order on your mobile device and finally, viewing the closeout package.

- » Performing the basics
 - Schedule a Service Order (Z-Web)
 - Execute the Service Order on your Mobile Device (Z-Mobile)
 - » Start task
 - » Assign asset
 - » Create new asset
 - » Save progress on task (no more end-of-day)
 - » Complete a Task/Signature Task
 - Attaching a calibration report and approving the service order (Z-Web)
 - Reviewing the Closeout Package (Z-Web)
 - Submitting your Timesheet