

AxisField User Manual

Field service, work orders and maintenance operations.
A complete step-by-step guide for every role.

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1 About AxisField and who uses it

AxisField runs the whole life of a maintenance job: a request comes in, the office schedules a technician, the technician works from a phone (even without signal), the client signs off, and the job is costed and ready to invoice.

1.1 The roles

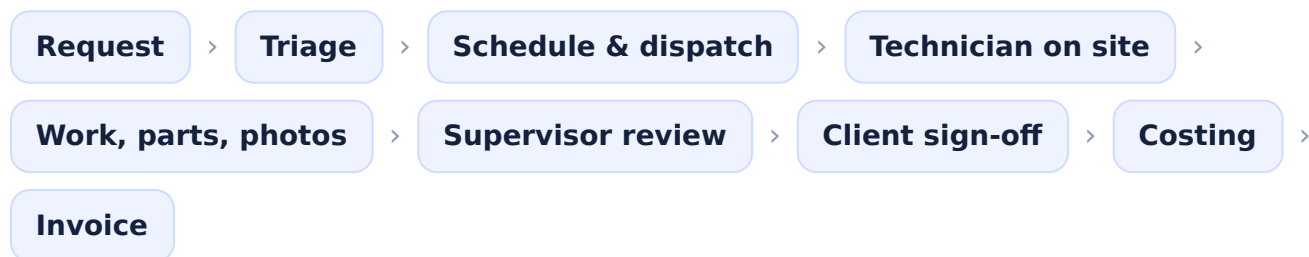
Everyone signs in with an email and password at `/login` and lands on the screen made for their role.

Role	What they do	Where they land
Administrator	Sets up the company (settings, skills, job types, users) and can do everything the office does.	Dashboard
Dispatcher	Logs requests, creates and assigns jobs, manages the schedule, clients, quotes and stock.	Dashboard
Supervisor	Everything a dispatcher does, plus reviews finished jobs, approves timesheets and records sign-off.	Dashboard
Technician	Works from the mobile app: jobs, checklists, photos, parts, time, client signature.	Technician app (Today)
Client	Sends requests, follows jobs, approves quotes, signs off work, downloads reports.	Client portal

1.2 What you need

- **Office staff:** any modern browser (Chrome, Edge, Safari, Firefox) on a computer or tablet.
- **Technicians:** an Android phone or iPhone. The site must use **HTTPS** so the app can work offline and ask for permissions.
- **Clients:** any phone or computer. Nothing to install.

1.3 How a job flows



If the technician finds extra work that was not planned, the job goes on hold, a **change authorization** (a small quote) is sent to the client, and the work continues once the client approves it.

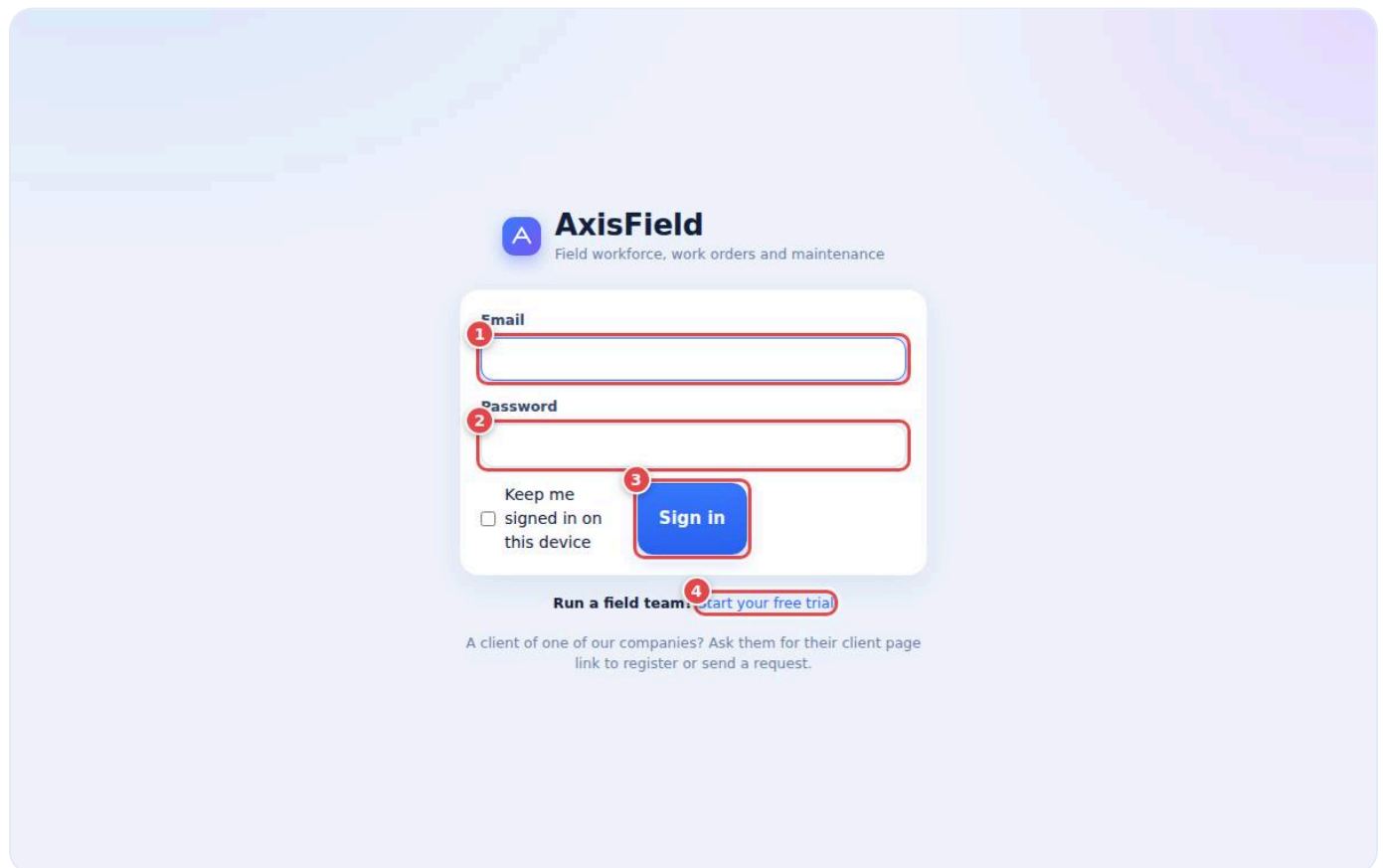
How to read this manual. Red numbered circles on the screens match the numbers in the steps. Each chapter says who it is for. Use the contents list on the left (or the Contents page in the PDF) to jump to a topic.

2 Getting started

Everyone

2.1 Sign in and sign out

- 1 Open your company's address in the browser, for example `https://your-site/login`.
- 2 Type your **email** (1) and **password** (2), then press **Sign in** (3). Tick *Keep me signed in on this device* on your own phone or computer.
- 3 To leave, press the sign-out icon next to your name at the bottom of the left menu (staff) or **Sign out** (clients).



The sign-in page

Forgot your password? Ask an administrator to set a new one: Users, open your name, type a new password, Save. After six wrong attempts the page waits a minute before allowing another try.

Technician waiting for approval? If you applied through the join form and the office has not approved you yet, the sign-in page tells you so. See chapter 4.

2.2 Finding your way around (office staff)

- 1 The **left menu** (1) holds every area: Dashboard, Dispatch Board, Requests, Jobs, Schedule, Technicians, Clients, Assets, Quotes, Maintenance, Timesheets, Inventory, Billing, Reports and Alerts. Administrators also see **Configuration** and **Settings**. Small coloured numbers show things waiting for you (new requests, timesheets to approve, alerts, technician applications).
- 2 The **cards** (2) at the top of the dashboard show total jobs, completed jobs, unassigned jobs and late check-ins. Click a card to open the matching list.
- 3 The **search box** (3) finds jobs, clients, assets and requests by number or name.
- 4 **New job** (4) starts a new work order from anywhere.

The screenshot shows the AxisField Dashboard for Thursday, 15 October 2026. The interface includes a left sidebar menu (1) with various navigation options and their associated counts. The main dashboard area (2) features four summary cards: Total Tasks (28, +833% vs last week), Completed Jobs (6, +100% vs last week), Unassigned Jobs (6, Needs attention), and Late Check-ins (2, Technicians not on site). A search box (3) and a 'Log request' button are located at the top right. A 'New job' button (4) is also present. Below the summary cards is a 'Dispatch Board' section for 15 Oct, 2026, which displays a grid of job cards. Each card includes a title, job number, location, time, priority, and category. A table at the bottom lists technicians and their availability percentages.

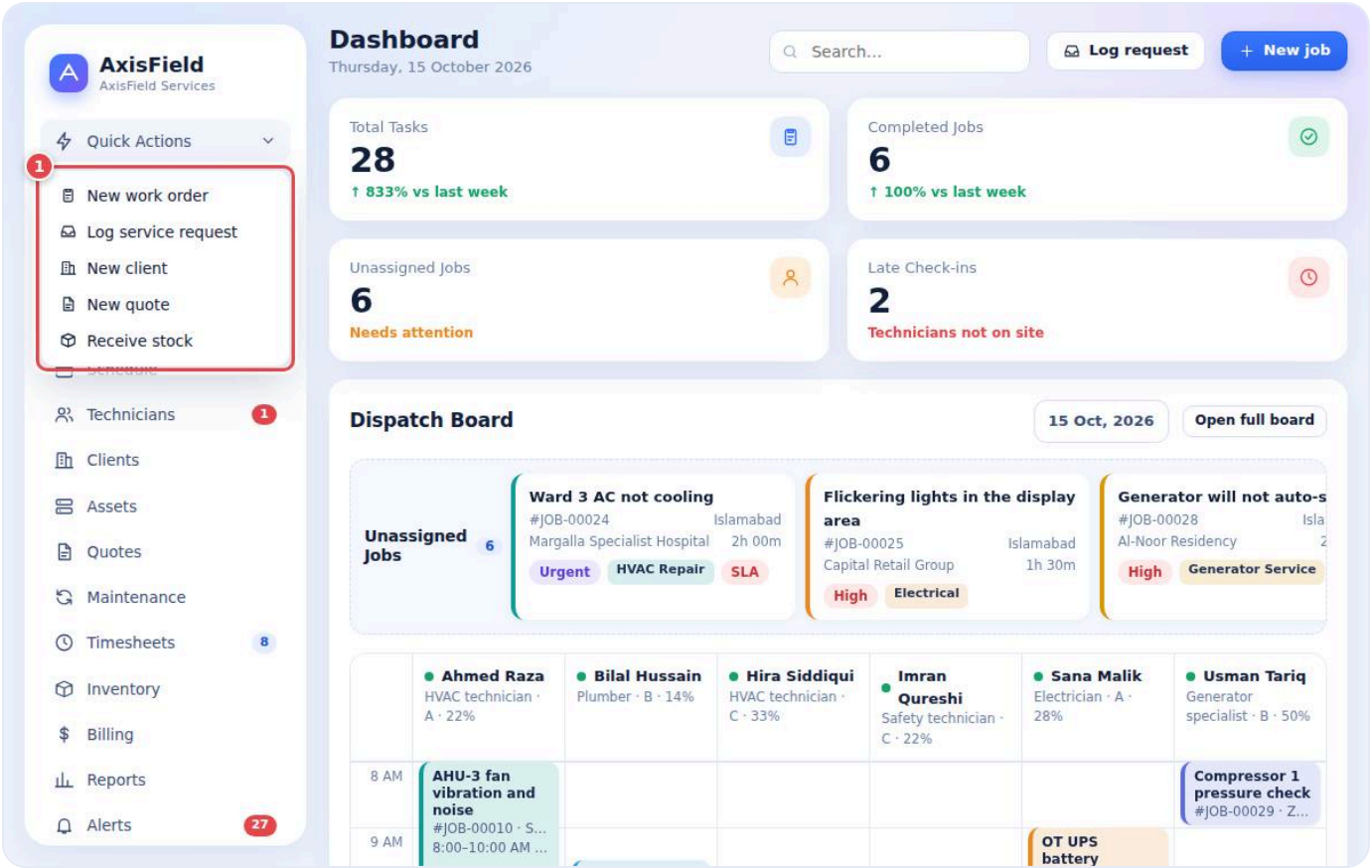
Unassigned Jobs	
Ward 3 AC not cooling #JOB-00024 Margalla Specialist Hospital 2h 00m Urgent HVAC Repair SLA	Flickering lights in the display area #JOB-00025 Capital Retail Group 1h 30m High Electrical
Generator will not auto-s #JOB-00028 Al-Noor Residency 2h 00m High Generator Service	

	Ahmed Raza HVAC technician · A · 22%	Bilal Hussain Plumber · B · 14%	Hira Siddiqui HVAC technician · C · 33%	Imran Qureshi Safety technician · C · 22%	Sana Malik Electrician · A · 28%	Usman Tariq Generator specialist · B · 50%
8 AM	AHU-3 fan vibration and noise #JOB-00010 · S...					Compressor 1 pressure check #JOB-00029 · Z...
9 AM	8:00-10:00 AM ...				OT UPS battery	

The dashboard

Quick Actions

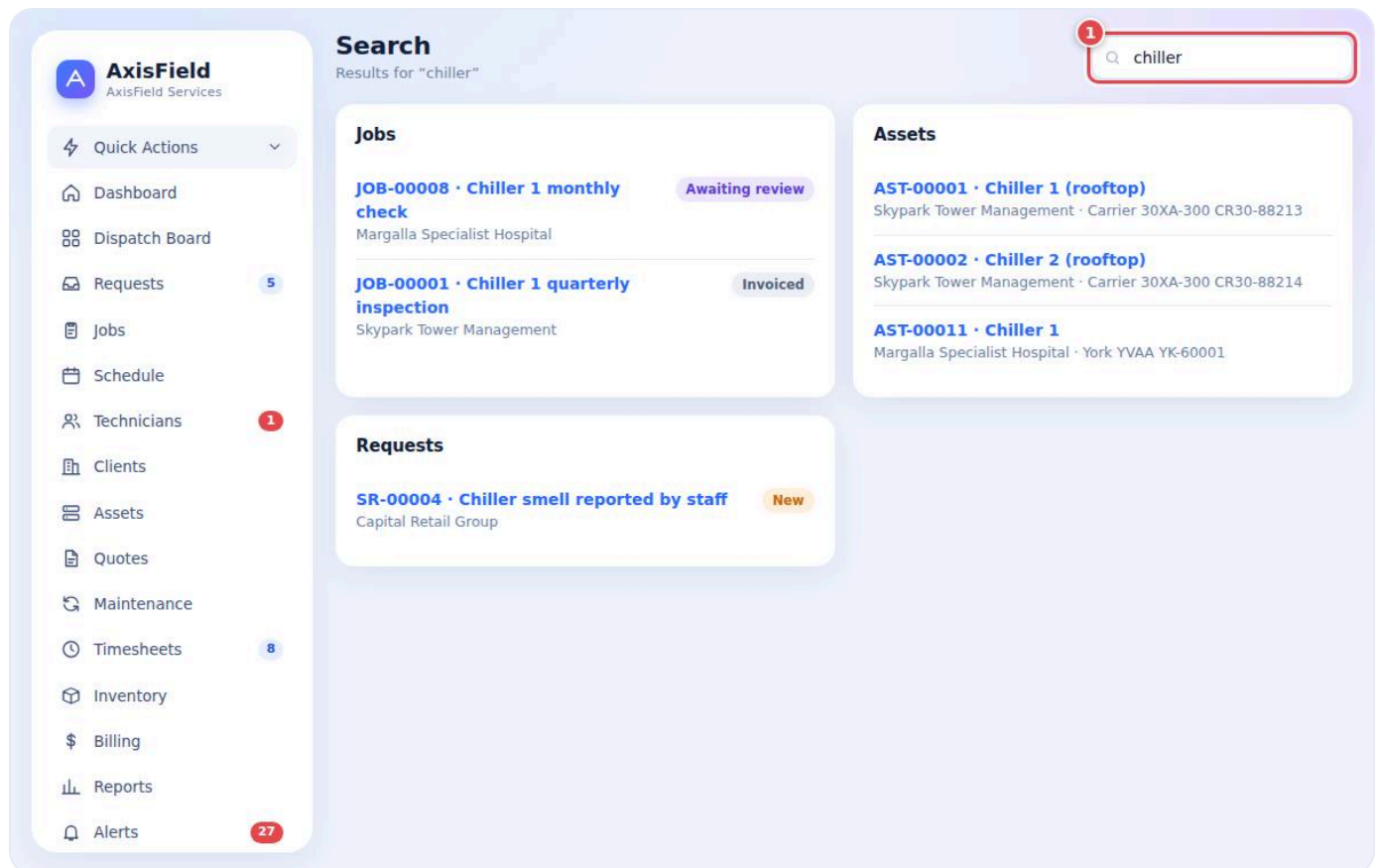
The **Quick Actions** menu at the top of the left menu (1) creates the things you add most often: a work order, a service request, a client, a quote, or a stock receipt.



Quick Actions menu

Search

Type at least two letters in the search box and press Enter. Results are grouped by jobs, clients, assets and requests.



Search results

2.3 Help

Help & Support in the menu lists the main links and addresses (technician app, billing API, email intake) for your company, and links to this manual.

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AxisField Services

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Help & Support

How a job moves through AxisField

Search...

Job life cycle

Request. From the web form, email, phone or the client portal. SLA clocks start here.

Triage. Set priority, link the client and site, then create a work order or reject it.

Schedule and dispatch. Drag the job onto a technician. Skill, working-hours and clash warnings appear before you confirm.

Field work. The technician starts travel, checks in, ticks the checklist, adds photos and parts, and completes the job on the phone. This works without signal and syncs later.

Additional work? The technician flags it. A change authorization is drafted and the job waits on hold for the client to approve.

Supervisor review then **customer sign-off** (on site or from the portal).

Job costing and billing. Labour, parts and extra costs are totalled. Ready-to-bill jobs export to AxisFinancial.

Good to know

Technician app. Technicians open `http://127.0.0.1:8020/tech` on a phone and use "Add to Home Screen". Use "Make jobs available offline" before going to a site with weak signal.

Checklists. Start a line with * in a job type to make that step required before the job can be completed.

Recurring maintenance. Maintenance contracts create the visits automatically every day at 02:00 (needs the scheduler, see the install guide). You can also press "Generate visits".

Billing handover. AxisFinancial can pull ready jobs from `http://127.0.0.1:8020/api/v1/billing/invoices` with the token in Settings, or you can download a CSV or JSON batch.

Email intake. Point your email provider's inbound webhook to `http://127.0.0.1:8020/api/intake/email`.

Support: `service@example.com` · +92 51 111 000 123

Help and Support

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3 Setting up your company

Administrator

Do this once when you start. Everything here is under **Settings** and the **Configuration** group in the left menu.

3.1 Company settings

- 1 Open **Settings**. Under **General** check the **company name** (1). It appears on quotes, reports and the public pages.
- 2 Choose your **time zone** (2) and **currency** (3). All times and prices follow them.
- 3 Type your default **Tax %** (4). It is added to quotes.
- 4 Press **Save settings** at the bottom of the form.

Settings
Company details, rates and integrations

General

1 **Company name**
AxisField Services

Company email
service@example.com

Phone
+92 51 111 000 123

Address
Plot 14, Blue Area, Islamabad

2 **Time zone**
Asia/Karachi

3 **Currency**
PKR

4 **Tax %**
16

Default markup %
20

Default labour rate / hour
2500

Overtime after (hours/day)
8

Overtime cost multiplier
1.5

Late check-in grace (minutes)
15

Create contract visits ahead (days)
14

Board starts
8

Board ends
19

Standard quote terms
Prices are valid for the period shown. Payment within 15 days of invoice. Additional work needs written approval before it starts.

Email intake token
Send inbound email to
http://127.0.0.1:8020/api/intake/email v
header X-Intake-Token.
sZEpsm9TkH2qoJyNTKIT9leCj7TaWoDyhZk09AI
Generate new token

AxisFinancial API token
Bearer token for GET
http://127.0.0.1:8020/api/v1/billing/in
and POST /api/v1/billing/acknowledge.
zsORxMB3uKwCk73albxV6yHMOUMKnby0ODC
Generate new token

Updates
After uploading a new version of AxisField, pres
once to apply database changes and add any r
default groups and skills. Existing data is kept.
Update database

Settings: general

Rates and rules

Setting	What it does
---------	--------------

Default markup %	Added to part prices on quotes.
Default labour rate / hour	Billed per hour when a technician has no personal billing rate.
Overtime after (hours/day) and multiplier	Hours beyond the daily limit are costed at the multiplier (for example 8 hours, 1.5 times).
Late check-in grace (minutes)	How long after the planned start a technician may stay "Scheduled" before the job shows as a late check-in alert.
Create contract visits ahead (days)	How far ahead maintenance contracts create their jobs.
Board starts / ends	Hours shown on the dispatch board.
Standard quote terms	Text printed on every new quote.

The screenshot displays the AxisField Settings interface. On the left is a sidebar with navigation links: Quick Actions, Dashboard, Dispatch Board, Requests (5), Jobs, Schedule, Technicians (1), Clients, Assets, Quotes, Maintenance, Timesheets (8), Inventory, Billing, Reports, and Alerts (27). The main content area is titled 'Settings: rates and rules' and contains the following fields:

- Contact Info:** Phone (+92 51 111 000 123) and Address (Plot 14, Blue Area, Islamabad).
- Time zone:** Asia/Karachi
- Currency:** PKR
- Tax %:** 16
- Default markup %:** 20
- Default labour rate / hour:** 2500 (marked with a red circle 1)
- Overtime after (hours/day):** 8 (marked with a red circle 2)
- Overtime cost multiplier:** 1.5 (marked with a red circle 3)
- Late check-in grace (minutes):** 15 (marked with a red circle 4)
- Create contract visits ahead (days):** 14 (marked with a red circle 5)
- Board starts:** 8
- Board ends:** 19
- Standard quote terms:** Prices are valid for the period shown. Payment within 15 days of invoice. Additional work needs written approval before it starts.

A 'Save settings' button is located at the bottom of the settings form. On the right side of the interface, there are three sections:

- AxisFinancial API token:** Includes a 'Generate new token' button, a Bearer token for GET and POST requests, and a token value: `zsORxMB3uKwCk73albxV6yHMOUMKnby0ODC`.
- Updates:** Includes an 'Update database' button and a note about applying database changes.
- Public request form:** Includes a link to share or embed on a website: `http://127.0.0.1:8020/c/axisfield-demo/request`.

Settings: rates and rules

Integration tokens

On the right of Settings you find the **Email intake token** and the **AxisFinancial API token**, and the address of your public pages. Press **Generate new token** to replace a token (the old one stops working immediately). See chapters 6 and 14.

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General

Company name
AxisField Services

Company email
service@example.com

Phone
+92 51 111 000 123

Address
Plot 14, Blue Area, Islamabad

Time zone
Asia/Karachi

Currency
PKR

Tax %
16

Default markup %
20

Default labour rate / hour
2500

Overtime after (hours/day)
8

Overtime cost multiplier
1.5

Late check-in grace (minutes)
15

Create contract visits ahead (days)
14

Board starts
8

Board ends
19

Standard quote terms
Prices are valid for the period shown. Payment within 15 days of invoice. Additional work needs written approval before it starts.

Save settings

Email intake token

Send inbound email to
<http://127.0.0.1:8020/api/intake/email> with header X-Intake-Token.

sZEpSm9TkH2qojyNtKIT9leCj7TaWoDyhZk09ANj

Generate new token

AxisFinancial API token

Bearer token for GET
<http://127.0.0.1:8020/api/v1/billing/invoices>
and POST [/api/v1/billing/acknowledge](http://127.0.0.1:8020/api/v1/billing/acknowledge).

zsORxMB3uKwCk73aibxV6yHMOUMKnby0ODCjEEW

Generate new token

Updates

After uploading a new version of AxisField, press this once to apply database changes and add any new default groups and skills. Existing data is kept.

Update database

Public request form

Share this link or embed it on your website:

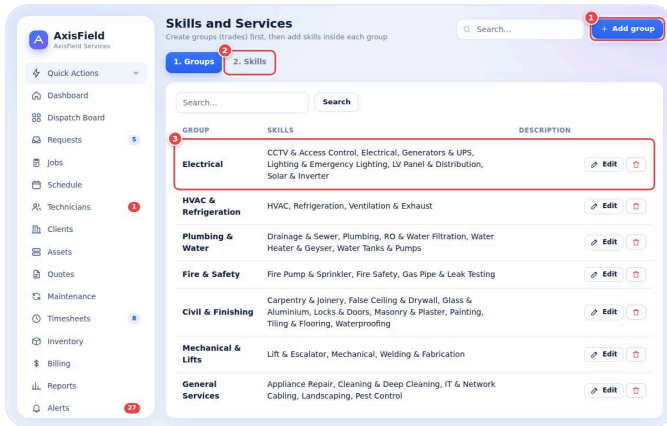
<http://127.0.0.1:8020/c/axisfield-demo>

Tokens and public page address

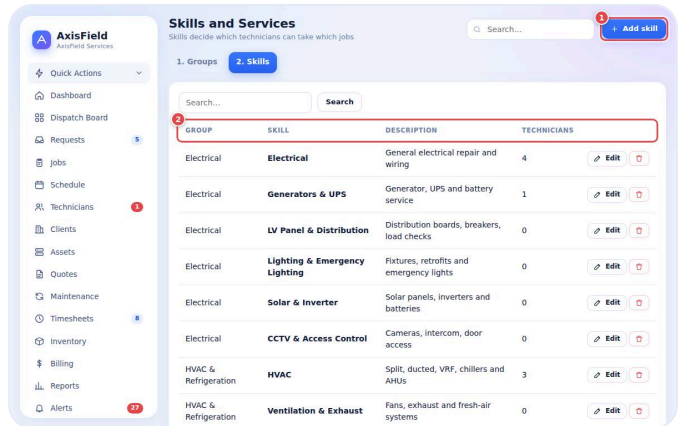
3.2 Skills and services

Skills decide which technician can take which job. They are arranged in **groups** (trades), for example *Plumbing & Water* contains *Plumbing*, *Water Tanks & Pumps* and *Drainage & Sewer*. The page has two tabs: **1. Groups** then **2. Skills**.

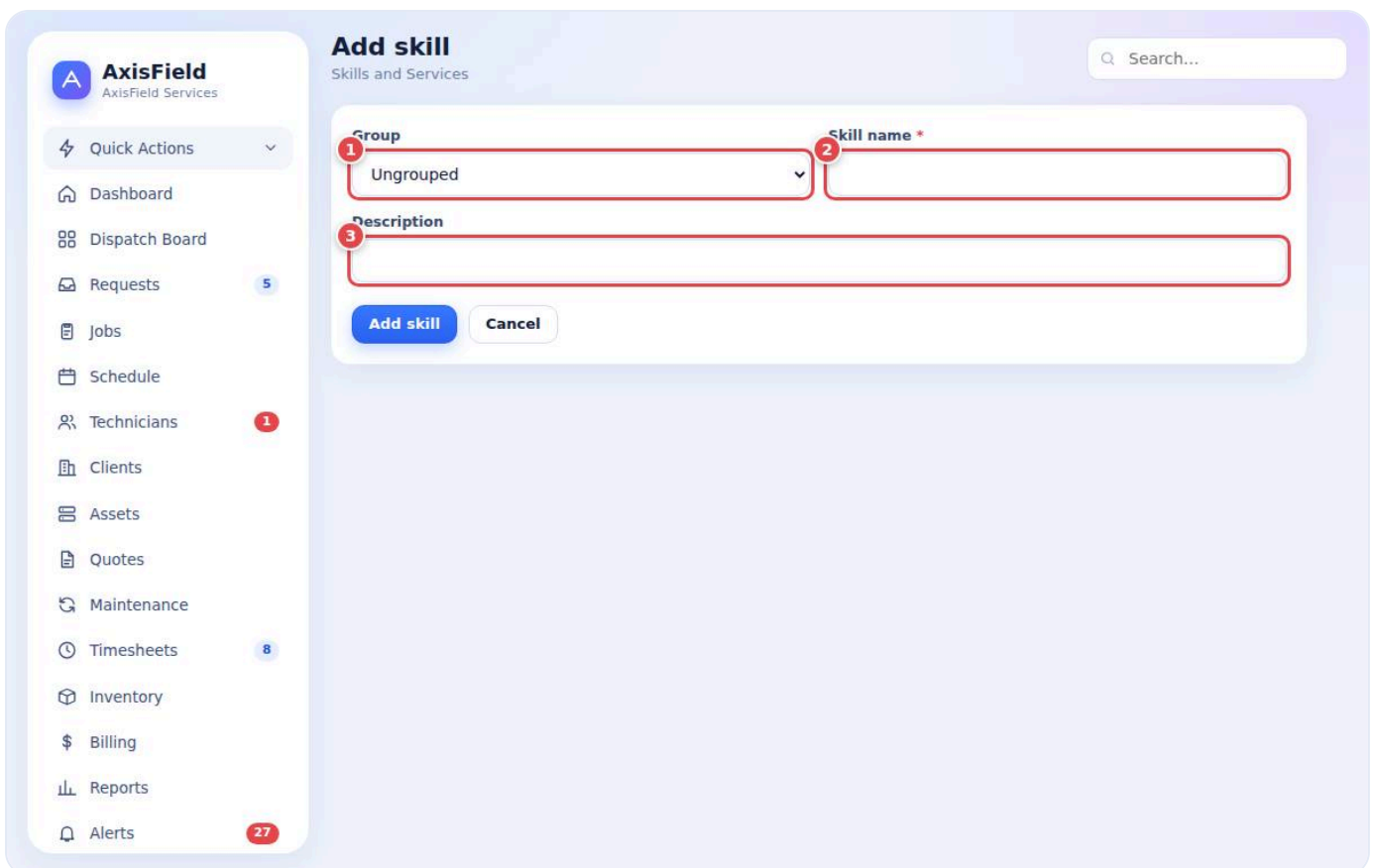
- 1** Open **Skills & Services**. The **Groups** tab shows each group with its skills (3). Press **Add group** (1) to create a trade group.
- 2** Type the group **name** and an optional sort order, then Save.
- 3** Open the **Skills** tab (2) and press **Add skill**. Choose the **Group** (1), type the **skill name** (2) and a **description** (3), then Save.



Groups tab



Skills tab



Adding a skill

Delete skills you never use so the technician form stays short. A skill that is already used cannot be deleted. Switch it off by editing instead.

3.3 Job types and checklists

A job type is a kind of work (AC Quarterly Service, Water Leak, Electrical Safety Audit). It sets the default duration, the skill needed and the **checklist** the technician follows on the

phone.

- 1 Open **Job Types** and press **Add job type**.
- 2 Type the **name** (1), the **default minutes** (2) and the **required skill** (3).
- 3 In **Checklist** (4) write one step per line. Start a line with * to make the step **required**: the technician cannot complete the job until required steps are ticked.
- 4 Save. New jobs of this type copy the checklist automatically.

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Job Types

Colour on the board, default duration, required skill and the checklist new jobs start with

Search...

Search

1

+ Add job type

Search...

Search

TYPE	DEFAULT TIME	REQUIRED SKILL	CHECKLIST	STATUS	
2					
● AC / Fan Installation	3h 00m	HVAC	5 steps	Active	Edit
● AC Not Cooling	1h 30m	HVAC	5 steps	Active	Edit
● AC Quarterly Service (PM)	1h 00m	HVAC	6 steps	Active	Edit
● CCTV / Access Control Installation	4h 00m	CCTV & Access Control	4 steps	Active	Edit
● Chiller / AHU Inspection (PM)	2h 30m	HVAC	5 steps	Active	Edit
● Door Lock / Hardware Repair	45m	Locks & Doors	3 steps	Active	Edit
● Electrical	1h 30m	Electrical	6 steps	Active	Edit
● Electrical Safety Audit	2h 30m	Electrical	4 steps	Active	Edit
● Emergency: Electrical Fault / Burning Smell	1h 00m	Electrical	4 steps	Active	Edit
● Emergency: Flooding /					

Job types list

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Quick Actions ▾

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- Dispatch Board
- Requests 5
- Jobs
- Schedule
- Technicians 1
- Clients
- Assets
- Quotes
- Maintenance
- Timesheets 8
- Inventory
- Billing
- Reports
- Alerts 27

Add job type

Job Types

Search...

1 Name *

2 Default minutes * 60

3 Required skill

Board colour *

☒ Active

4 Checklist (one step per line)

Start a line with * to make that step required before the job can be completed.

Add job type **Cancel**

Job type with checklist

Changing a job type later does not change jobs that already exist.

3.4 Teams and SLA policies

Teams group technicians (for example by area or crew). They colour the dispatch board and can be used as a filter.

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Teams

Group technicians so jobs can be allocated to a crew

Search...

Search

1

Add team

Search...

Search

TEAM	TECHNICIANS	
A	Ahmed Raza, Sana Malik	Edit
B	Bilal Hussain, Usman Tariq	Edit
C	Hira Siddiqui, Imran Qureshi	Edit

Teams

SLA Policies set how fast you promise to respond and to finish for each priority (Urgent, High, Standard, Low). Edit the minutes to match your promises. New requests and jobs get their due times from this table.

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SLA Policies

Response and resolution targets by priority. They set the due times on requests and jobs.

Search...

Add SLA policy

1

POLICY	PRIORITY	RESPOND WITHIN	RESOLVE WITHIN	
Urgent	Urgent	30m	4h 00m	Edit
High	High	2h 00m	8h 00m	Edit
Standard	Medium	8h 00m	48h 00m	Edit
Low	Low	24h 00m	120h 00m	Edit

SLA policies

3.5 Users and roles

- 1 Open **Users** and press **Add user** (1).
- 2 Type name and email, choose the **role** (2), set a password of at least 8 characters (3) and keep *Can sign in* ticked.
- 3 For a client login choose role *Client* and pick the client company. For a technician choose *Technician*: a technician profile is created for you.
- 4 To stop someone signing in, edit the user and untick *Can sign in*.

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Users

Who can sign in and what they can do

Search...

Search

1

+ Add user

2

NAME	EMAIL	ROLE	LAST SIGN-IN	STATUS		
Ahmed Raza	tech@axisfield.test	Technician	15 Oct, 01:09 PM	Active	Edit	
Ayesha Rahim	client@axisfield.test	Customer (portal)	15 Oct, 01:09 PM	Active	Edit	
Bilal Ahmed	bilal.ahmed@example.com	Technician	Never	Off	Edit	
Bilal Hussain	bilal@axisfield.test	Technician	Never	Active	Edit	
Faisal Dar	dispatcher@axisfield.test	Dispatcher	Never	Active	Edit	
Hira Siddiqui	hira@axisfield.test	Technician	Never	Active	Edit	
Imran Qureshi	imran@axisfield.test	Technician	Never	Active	Edit	
Maryam Khan	admin@axisfield.test	Administrator	15 Oct, 01:13 PM	Active	Edit	
Nadia Anwar	supervisor@axisfield.test	Supervisor	Never	Active	Edit	
Sana Malik	sana@axisfield.test	Technician	Never	Active	Edit	

User list

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Add user

Users

Search...

1

Full name *

2

Role *

3

Password *

At least 8 characters.

Add user

Cancel

Can sign in

Adding a user

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4

Technicians and applications

Administrator

Dispatcher

Supervisor

4.1 Add a technician yourself

- 1 Open **Technicians** and press **Add technician**.
- 2 Fill **name** (1), job title and phone. Choose a **team**.
- 3 Set **working hours** (2) and the **working days**. The dispatch board warns when a job falls outside them.
- 4 Set **cost per hour** (3). This is what the technician costs you; it feeds job costing. A *bill rate* is optional.
- 5 Tick their **skills** (4), grouped by trade.
- 6 To let them use the phone app, type a **login email** (5) and a password (minimum 8 characters) now.
- 7 Press **Save**.

Add technician

Search...

1 Full name *

Job title: HVAC technician

Phone:

Employee code:

Team:

3 Cost per hour: 0

Billing rate per hour:

Status: Active

Works from: **2** 08:00 AM

Works until: 05:00 PM

Working days: ☒ Mon ☒ Tue ☒ Wed ☒ Thu ☒ Fri ☒ Sat ☐ Sun

Skills

General Services: ☐ Appliance Repair ☐ Cleaning & Deep Cleaning ☐ IT & Network Cabling ☐ Landscaping ☐ Pest Control

Civil & Finishing: ☐ Carpentry & Joinery ☐ False Ceiling & Drywall ☐ Glass & Aluminium ☐ Locks & Doors ☐ Masonry & Plaster ☐ Painting ☐ Tiling & Flooring ☐ Waterproofing

Electrical: ☐ CCTV & Access Control ☐ Electrical ☐ Generators & UPS ☐ Lighting & Emergency Lighting ☐ LV Panel & Distribution ☐ Solar & Inverter

Plumbing & Water: ☐ Drainage & Sewer ☐ Plumbing ☐ RO & Water Filtration ☐ Water Heater & Geyser ☐ Water Tanks & Pumps

Fire & Safety: ☐ Fire Pump & Sprinkler ☐ Fire Safety ☐ Gas Pipe & Leak Testing

HVAC & Refrigeration: **4** ☒ HVAC ☐ Refrigeration ☐ Ventilation & Exhaust

Mechanical & Lifts: ☐ Lift & Escalator ☐ Mechanical ☐ Welding & Fabrication

Optional: create a login so this technician can use the mobile app.

5 Login email:

Password:

Add technician **Cancel**

Technician form

4.2 Technician applications (self sign-up)

Technicians can apply themselves, so you do not have to type their details.

What the technician does

- 1 The technician opens `/technician/join` on their phone (also linked as *Technician? Apply to join* or *Join as technician* on the public pages).
- 2 They enter name (1), mobile, **email** (2) and a password, tick their **trades and skills** (3), add years of experience, area and a short note, and press **Send**

application (4).

- 3 They see "Application received". Their login stays **switched off** until you approve.

A

AxisField Services

+92 51 111 000 123 service@example.com

Join our technician team

Apply once. When the office approves your application you can sign in to the technician app on your phone and receive jobs.

1

Full name *

Bilal Ahmed

Mobile number *

0301 2223344

2

Email (your sign-in) *

bilal.ahmed@example.com

Password *

.....

Repeat password *

.....

Your trades and skills *

General Services

☐ Appliance Repair

☐ Cleaning & Deep Cleaning

☐ IT & Network Cabling

☐ Landscaping

☐ Pest Control

Civil & Finishing

☐ Carpentry & Joinery

☐ False Ceiling & Drywall

☐ Glass & Aluminium

☐ Locks & Doors

☐ Masonry & Plaster

☐ Painting

☐ Tiling & Flooring

☐ Waterproofing

Electrical

☐ CCTV & Access Control

☒ Electrical

☐ Generators & UPS

☐ Lighting & Emergency Lighting

☐ LV Panel & Distribution

☐ Solar & Inverter

Plumbing & Water

☐ Drainage & Sewer

☐ Plumbing

☐ RO & Water Filtration

☐ Water Heater & Geyser

☐ Water Tanks & Pumps

Fire & Safety

☐ Fire Pump & Sprinkler

☐ Fire Safety

☐ Gas Pipe & Leak Testing

HVAC & Refrigeration

3

☒ HVAC

☐ Refrigeration

☐ Ventilation & Exhaust

Mechanical & Lifts

☐ Lift & Escalator

☐ Mechanical

☐ Welding & Fabrication

Years of experience

6

Area / city you work in

Islamabad, G-10

Anything else we should know?

Own motorbike and toolkit. Available 7 days.

4

Send application

Already approved? Sign in

The join form (technician)

What you do

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- 1 A number appears next to **Technicians** in the menu. Open the page: a box **Technician applications waiting** (1) lists each applicant with skills, experience, area and note.
- 2 Press **Approve** (2) to switch the login on. The technician form opens so you can set their team, working hours and cost per hour. Press **Decline** (3) to refuse.
- 3 Tell the technician they can sign in. Until approved, signing in shows "waiting for approval".

The screenshot shows the AxisField Technicians page. The sidebar on the left contains a menu with items like Quick Actions, Dashboard, Dispatch Board, Requests (5), Jobs, Schedule, **Technicians (1)**, Clients, Assets, Quotes, Maintenance, Timesheets (8), Inventory, Billing, Reports, and Alerts (27). The main header includes a search bar and a '+ Add technician' button (4). The main content area features a 'Technician applications waiting' box (1) with a table of applicants. Below this is a filter section with 'Active', 'Switched off', and 'All' tabs. The main table lists technicians with columns for Technician, Team, Skills, Hours, Open Jobs, Cost / Hr, and Login.

APPLICANT	SKILLS	EXPERIENCE	AREA	APPLIED	
Bilal Ahmed 0301 2223344 · bilal.ahmed@example.com "Own motorbike and toolkit. Available 7 days."	HVAC Electrical	6 yr	Islamabad, G-10	15 Oct, 01:12 PM	Approve (2) Decline (3)

TECHNICIAN	TEAM	SKILLS	HOURS	OPEN JOBS	COST / HR	LOGIN
Ahmed Raza HVAC technician · AF-101	A	HVAC	08:00-17:00	2	520.00	App login
Bilal Hussain Plumber · AF-103	B	Plumbing Mechanical	08:00-17:00	1	430.00	App login
Hira Siddiqui HVAC technician · AF-105	C	HVAC Mechanical	08:00-17:00	2	500.00	App login
Imran Qureshi Safety technician · AF-106	C	Electrical Fire Safety	08:00-17:00	3	540.00	App login
Sana Malik						

Applications waiting on the Technicians page

4.3 Time off and availability

Open a technician and use **Time off** to add leave (dates and reason). Dispatch warns if you assign a job during leave.

AxisField

AxisField Services

Quick Actions

Dashboard

Dispatch Board

Requests5

Jobs

Schedule

Technicians1

Clients

Assets

Quotes

Maintenance

Timesheets8

Inventory

Billing

Reports

Alerts27

Ahmed Raza

HVAC technician · Team A

Search...

Edit

Dispatch board

Jobs this week

2

Hours worked this week

0.0

Overtime this week

0.0

Hours / days

08:00-17:00

Mon Tue Wed Thu Fri Sat

This week's jobs

Thu 15, 08:00 AM

AHU-3 fan vibration and noise

Skypark Tower Management

In progress

Sun 18, 08:30 AM

Humidification plant nozzle blockage

Zenith Textile Mills

Scheduled

Profile

Phone

0301 5510000

Login

tech@axisfield.test

Cost / hour

PKR 520.00

Skills

HVAC

1Time off

+ Add

No upcoming leave.

Vehicle stock · Van · Ahmed Raza

Pleated air filter 24x24

8

Recently completed

JOB-00001 · Chiller 1 quarterly inspection

Skypark Tower Management

06 Oct 2026

A technician profile with time off

4.4 Stopping a technician

Edit the technician and set **Status** to *Switched off*. They disappear from assignment lists and cannot sign in, but their history is kept.

5

Clients, sites and assets

Administrator

Dispatcher

Supervisor

5.1 Add a client

- 1 Open **Clients** and press **New client** (or use Quick Actions).
- 2 Type the **name** (1) and choose the **type** (2): commercial, residential, government or industrial.
- 3 Add email (3), phone and the **billing address** (4).
- 4 Save. The email is used to match future requests to this client automatically.

AxisField
AxisField Services

Quick Actions ▾

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Dispatch Board

Requests 5

Jobs

Schedule

Technicians 1

Clients

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Quotes

Maintenance

Timesheets 8

Inventory

Billing

Reports

Alerts 27

Clients
Customers, their sites and contacts

Search...

+ New client

2 Search name, code, phone, em Any type ▾ Active ▾ Search

CLIENT	TYPE	PRIMARY CONTACT	SITES	ASSETS	OPEN JOBS
3 Al-Noor Residency C-0006	Residential	Jamil Ahmed 0300 6600111	1	3	3
Capital Retail Group C-0004	Commercial	Hamza Iqbal 0300 7770111	2	3	3
Margalla Specialist Hospital C-0002	Commercial	Zubair Ali 0321 8800222	2	5	6
NexGen Offices C-0005	Commercial	Mehwish Tahir 0312 1200111	1	2	3
Skypark Tower Management C-0001	Commercial	Ayesha Rahim 0333 4400100	2	6	4
Zenith Textile Mills C-0003	Industrial	Shahid Butt 0345 2200111	1	3	3

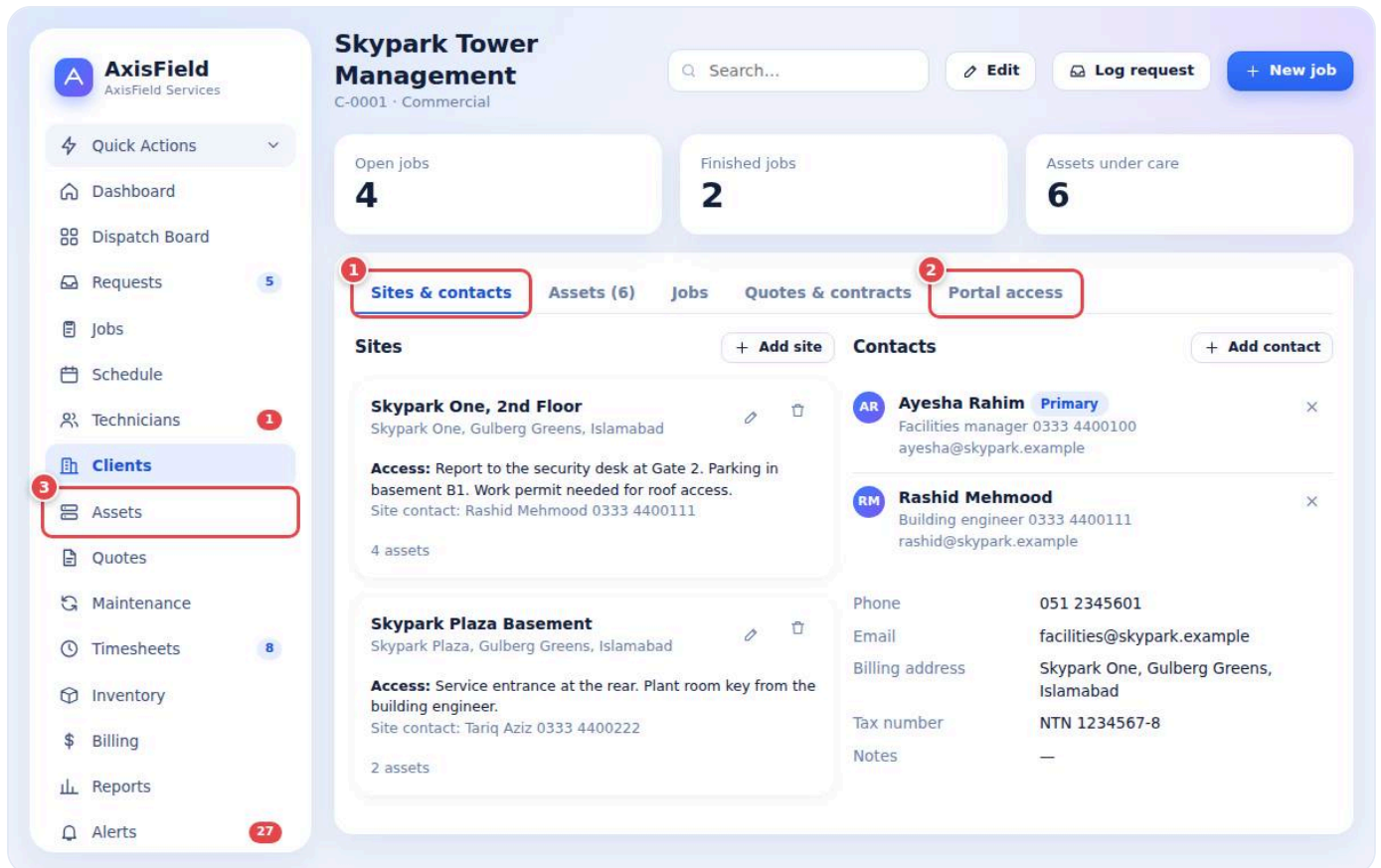
Client list

New client

5.2 Sites, contacts and portal login

Open a client to see its page. A client can have several **sites** (buildings or addresses), several **contacts**, their **assets** and history.

- 1 Under **Sites** (1) press *Add site*: name, address, city and **access instructions** (for example "report to security desk at Gate 2"). Technicians see these on their phone.
- 2 Under **Contacts** add the people to call. Mark one as *primary*.
- 3 Near the bottom of the client page, in the box about the client portal (2), type a name and email and press the create-login button. A temporary password is shown **once**: copy it and send it to the client. They can then sign in to the client portal.



A client page

Clients can also register themselves from your company page. Their account is linked to a client record automatically.

5.3 Assets

An asset is a piece of equipment you maintain: a chiller, a generator, a lift. Linking jobs to assets builds a history per machine.

- 1 Open **Assets** and press **Add asset**.
- 2 Choose the **client** (1) and site, type the **name** (2), serial number (3), make and model, install and warranty dates.
- 3 Save. On the asset page you see every job done on it and any contracts covering it.

AxisField

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Assets

Equipment under maintenance, with warranty and service history

Search...

New asset

Code, name, serial, make, mod

Any client

Any category

Any status

☐ Warranty ending in 60 days

Search

CODE	ASSET	CLIENT / SITE	MAKE / MODEL	SERIAL	WARRANTY	STATUS
AST-00001	Chiller 1 (rooftop) HVAC	Skypark Tower Management Skypark One, 2nd Floor	Carrier 30XA-300	CR30-88213	13 Apr 2027	Active
AST-00002	Chiller 2 (rooftop) HVAC	Skypark Tower Management Skypark One, 2nd Floor	Carrier 30XA-300	CR30-88214	13 Apr 2027	Active
AST-00003	AHU-3 Level 2 HVAC	Skypark Tower Management Skypark One, 2nd Floor	Trane CSAA012	TR-55120	05 Sep 2026	Faulty
AST-00004	Main LV panel Electrical	Skypark Tower Management Skypark One, 2nd Floor	Schneider Prisma G	SE-90011	19 Nov 2027	Active
AST-00005	Basement ventilation fan HVAC	Skypark Tower Management Skypark Plaza Basement	Systemair AXC 630	SY-33021	29 Mar 2026	Active

Asset register

AxisField

AxisField Services

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New asset

Search...

Client *

Choose...

Site

—

Asset name *

e.g. Rooftop chiller 1

Asset code

Auto

Category

HVAC, Electrical, Generator...

Location detail

Roof, Block B

Make

Model

Serial number

Install date

mm/dd/yyyy

Warranty expires

mm/dd/yyyy

Status

Active

Notes

Add asset

Cancel

Adding an asset

6

Service requests

Dispatcher

Supervisor

Administrator

Client

A service request is a customer's message that something needs doing. It is not a job yet: you triage it first, then turn it into a work order.

6.1 Where requests come from

Source	How
Web form	Anyone opens <code>/request</code> , no account needed. Add this link to your website.
Client portal	A signed-in client presses Request service ; their details are filled in.
Email	Your email provider forwards inbound mail to the email intake address with your intake token (Settings). The subject becomes the title; words like <i>urgent</i> or <i>leak</i> raise the priority.
Phone or walk-in	You log it yourself with Log request .

6.2 Log a request yourself

- 1 Open **Requests** and press **Log request** (or Quick Actions, *Log service request*).
- 2 Type what is wrong in **title** (1) and choose the **priority** (2). Add client details or pick the client and site.
- 3 Save. The response and resolution due times are set from your SLA policy.

AxisField

AxisField Services

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Service Requests

Web, email, phone and portal requests waiting to become jobs

Search...

3

+ Log request

1

Open (6)

New (5)

Converted

Rejected

All

Search

Any priority

Any source

Filter

2

REQUEST	FROM	SOURCE	PRIORITY	RESPOND BY	STATUS
Kitchen tap leaking SR-00007 · 15 Oct, 01:12 PM	Sara Khan 0300 5551234	Web form	Medium	15 Oct, 09:12 PM	New
Chiller smell reported by staff SR-00004 · 15 Oct, 01:09 PM	Capital Retail Group 0300 7770111	Phone	Medium	15 Oct, 09:09 PM	New
RE: Generator noise during test run SR-00003 · 15 Oct, 08:09 AM	Margalla Specialist Hospital zubair@margallahospital.example	Email	High	15 Oct, 03:09 PM	New
Quote for new split ACs in 3 offices SR-00002 · 15 Oct, 01:09 PM	Bashir Ahmed 0300 2223344	Web form	Medium	15 Oct, 09:09 PM	New
Server room is too warm SR-00001 · 15 Oct, 12:49 PM	NexGen Offices 0312 1200111	Web form	High	15 Oct, 03:09 PM	New

Please service lift

The request list: new requests first

Logging a request

6.3 Requests sent from a phone include the customer's location

When a customer opens the request form on a **mobile phone**, the form offers to attach their **current location** and asks for a **short address**.

What the customer sees

- 1 A blue box **Share your current location** (1) appears. The customer taps **Use my location** and allows location in the phone's pop-up.
- 2 The phone finds them and the form fills in a **short address** (2) such as "14 Street 9, F-7/3, Islamabad". The customer corrects it if needed. On phones this field is **required**.
- 3 They describe the problem (3) and press **Send request** (4).



AxisField Services

+92 51 111 000 123 service@example.com

Request service

Tell us what is wrong and we will contact you.
For emergencies please also call +92 51 111 000 123.

Your name *

Sara Khan

Phone *

0300 5551234

Email *

sara.khan@example.com

1

Share your current location

☒ Helps the technician find you. Used once for this request only, never tracked.

Location attached. We filled a short address, please correct it if needed.

Update location

Map

2 **Site address ***

14 Street 9, F-7/3, Islamabad

3 **What is the problem? ***

Kitchen tap leaking

Details *

Water dripping under the sink since last night.

How urgent is it?

Normal



Photo (optional)

Choose File No file chosen

4

Send request

Existing client? [Sign in to the portal](#) · New? [Create an account](#)

account

Request form on a phone

Privacy. Location is read once, only after the customer taps the button, and only for this request. It is never tracked afterwards. If the customer refuses permission they can simply type the address. On computers the box is not shown.

What you see

On the request (and later on the job and the technician's phone) a line **Client location** with **Open client location in Maps** shows the accuracy and the address the phone resolved. One tap opens the map for navigation.

AxisField
AxisField Services

Quick Actions ▾

- Dashboard
- Dispatch Board
- Requests** 5
- Jobs
- Schedule
- Technicians 1
- Clients
- Assets
- Quotes
- Maintenance
- Timesheets 8
- Inventory
- Billing
- Reports
- Alerts 27

Kitchen tap leaking
SR-00007 · Web form · 15 Oct, 01:12 PM

New Medium

Water dripping under the sink since last night.

Requester Sara Khan 0300 5551234 sara.khan@example.com

Client **Not linked**

Site 14 Street 9, F-7/3, Islamabad

Client location **Open client location in Maps** shared by the client
(about 28 m)
House 14, Street 9, F-7/3, Islamabad, Pakistan

Asset —

Job type —

Respond by 15 Oct, 09:12 PM

Resolve by 17 Oct, 01:12 PM

Attachments
None.

Choose File No file chosen **Upload**

Triage

Link to an existing client
Choose... ▾

Link client

Work order title
Kitchen tap leaking

Client
— ▾

☐ Create a new client from this contact

Job type **Priority**
— ▾ Medium ▾

Assign now (optional)
Leave unassigned ▾

Start **Minutes**
mm/dd/yyyy, --:--:-- 60

Create work order

Quote first **Reject**

A request with the client location

6.4 Triage: turn a request into a job

- 1 Open the request. Check the description, photos under **Attachments** and the location.
- 2 If the client is not linked, use **Link to an existing client**, or tick *Create a new client from this contact* when converting.
- 3 In **Triage** check the work order title, job type, priority, site and (optionally) the technician and start time.
- 4 Press **Create work order**. The request becomes *Converted* and links to the new job. The first response time is recorded.
- 5 If it is not valid (spam, duplicate) press **Reject** and give a note.

Watch **Respond by** on every request. A red *Response overdue* badge means the SLA is missed and it also appears under Alerts.

7

Work orders (jobs)

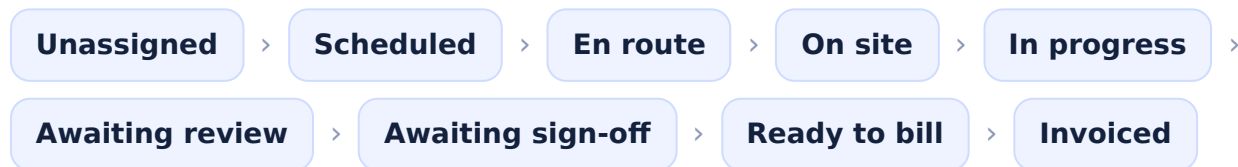
Dispatcher

Supervisor

Administrator

A work order (shown as **Jobs**) is the heart of the system. Everything about one piece of work lives on its page: schedule, checklist, photos, parts, time, costs, sign-off.

7.1 The life of a job



Status	Meaning	Who moves it
Unassigned	Created, nobody booked yet	Dispatcher assigns
Scheduled	Technician and time set	Technician starts travel
En route / On site	Technician travelling / arrived	Technician (phone)
In progress	Working. Time is recorded.	Technician
On hold	Waiting (for example client approval of extra work)	Technician or office
Awaiting review	Technician marked complete	Supervisor reviews
Awaiting sign-off	Reviewed, waiting for the client	Client signs
Ready to bill	Signed off and costed	Billing exports
Invoiced	Handed to accounts	Billing

7.2 Create a job

1

Press **New job**. Choose the **client** (1), then the **site** (2) and equipment.

- 2 Choose the **job type** (3). The duration, required skill and checklist are filled in for you.
- 3 Set **priority** (4) and write a clear **title** (5) and details. Add instructions for the technician.
- 4 Optional: choose the **start time** (6) and the **technician** (7) now. If you leave them empty the job stays *Unassigned* and waits on the dispatch board.
- 5 Save. You land on the job page.

AxisField
AxisField Services

New job
Create a work order

Search...

Job details

1 Client *
Choose a client...

2 Site
—

5 Title *
e.g. Quarterly HVAC inspection

3 Job type
—

4 Priority
Medium

Assets being worked on

Hold Ctrl or Cmd to pick several. Choose a client first.

Description

Instructions for the technician

Client PO number

Skill required
None

Extra checklist steps
One per line. Start with * to make a step required.

The job type's checklist is added automatically.

Schedule

7 Technician
Unassigned

Team
—

6 Start
mm/dd/yyyy, --:-- --

Expected duration (minutes)
60

Due by (SLA)
mm/dd/yyyy, --:-- --

Left blank, it is set from the SLA policy for the priority.

Extra crew
Ahmed Raza
Bilal Hussain
Hira Siddiqui
Imran Qureshi

Create job

Cancel

New job form

Most jobs come from requests (chapter 6) or maintenance contracts (chapter 13), so you rarely type them from scratch.

7.3 Find jobs

The **Jobs** list has filters for status, technician, client and priority and a search box. Click a row to open the job.

The screenshot shows the AxisField Jobs page. On the left is a sidebar with navigation links: Quick Actions, Dashboard, Dispatch Board, Requests (5), Jobs (selected), Schedule, Technicians (1), Clients, Assets, Quotes, Maintenance, Timesheets (8), Inventory, Billing, Reports, and Alerts (27). The main area is titled 'Jobs' with the subtitle 'Every work order, from request to invoice'. It features a search bar and a '+ New job' button. Below these are filters for status (Open (22), Unassigned (6), Awaiting review (3), Ready to bill (3), Finished, All), search criteria (Search number, title, client, P), priority (Any priority), technician (Any technician), type (Any type), client (Any client), and a 'Past due' checkbox. A 'Sort: schedule' dropdown and a 'Filter' button are also present. The job list table has columns: JOB, CLIENT / SITE, PRIORITY, TECHNICIAN, SCHEDULED, DUE, and STATUS. Three jobs are listed: 1. Replace OT UPS battery bank (Margalla Specialist Hospital, Medium priority, 17 Oct, 01:09 PM, Unassigned). 2. Generator will not auto-start (Al-Noor Residency, High priority, 15 Oct, 09:09 PM, Unassigned). 3. Install 4 additional wall sockets (NexGen Offices, Medium priority, 17 Oct, 01:09 PM, Unassigned). A fourth job, Washroom tap leak, floor, is partially visible.

JOB	CLIENT / SITE	PRIORITY	TECHNICIAN	SCHEDULED	DUE	STATUS
• Replace OT UPS battery bank #JOB-00031 · Electrical	Margalla Specialist Hospital Main Hospital Building	Medium	—	—	17 Oct, 01:09 PM	Unassigned
• Generator will not auto-start #JOB-00028 · Generator Service	Al-Noor Residency Tower A and B	High	—	—	15 Oct, 09:09 PM	Unassigned
• Install 4 additional wall sockets #JOB-00027 · General	NexGen Offices NexGen HQ, Floor 5	Medium	—	—	17 Oct, 01:09 PM	Unassigned
• Washroom tap leak, floor	Skypark Tower					

The jobs list

7.4 Assign, reschedule and add crew

- 1 Open the job and press **Assign** (or **Reschedule**).
- 2 Choose the **technician** (1), the **start** date and time (2) and the length in minutes, then **Save** (3).
- 3 The system checks **skill, working hours and leave** and **clashes** with other jobs. If it finds a problem it lists the warnings and asks you to confirm. You can still go ahead when you know better.
- 4 Use **Crew** on the right of the page to add extra technicians. The first technician is the **lead**: only the lead moves the job status on the phone. Crew members see the job on their phone, but only the lead records time and moves the status.

The screenshot displays the AxisField interface for a job titled "Replace OT UPS battery bank" (JOB-00031) at Margalla Specialist Hospital. The left sidebar contains navigation options like Quick Actions, Dashboard, Dispatch Board, Requests, Jobs (highlighted), Schedule, Technicians, Clients, Assets, Quotes, Maintenance, Timesheets, Inventory, Billing, Reports, and Alerts. The main area shows the job status as "Unassigned" with a "Medium" priority and "Electrical" category. A workflow bar includes stages from "Unassigned" to "Invoiced". The "Overview" tab is active, showing a description of the job: "Supply and fit 16 batteries, test runtime and dispose of old units." It lists specific tasks: "Battery 12V 100Ah x 16", "Installation and runtime test x 8", and "Disposal of old batteries x 1". Client and site details are provided, including contact information for Dr. Kamran Shah. The "Schedule" section shows the job is "Unassigned" with a due date of "17 Oct, 01:09 PM". The "Customer sign-off" and "Additional work" sections indicate no sign-off yet and no additional work requested, respectively. Red callout numbers 1, 2, and 3 highlight the "Assign" button, the "Overview" tab, and the "Unassigned" status label.

An unassigned job with the Assign button

This screenshot shows the same job page as above, but with the "Assign or reschedule" dialog box open. The dialog box has three main sections: "Technician" with a dropdown menu showing "Unassigned" (highlighted with a red circle and number 1), "Start" with a date/time picker (highlighted with a red circle and number 2) and a "Minutes" field set to "90" (highlighted with a red circle and number 3). At the bottom of the dialog are "Save" and "Close" buttons. The background interface remains the same, showing the job details and navigation sidebar.

Assign or reschedule

7.5 Follow the work

The job page has tabs and side cards:

- **Overview** (2): instructions, client, site, access, assets, required skill.
- **Checklist & photos** (3): the steps with who ticked them, and before/during/after photos.
- **Parts**: stock reserved and used. **Time & cost**: timesheet lines and extra costs. **History**: everything that happened, with times.
- **Schedule** card: technician, team, planned and actual times, SLA due time. **Customer sign-off** and **Additional work** cards.

The screenshot displays the AxisField job page for a task titled "AHU-3 fan vibration and noise". The interface includes a left-hand navigation menu with options like Quick Actions, Dashboard, Dispatch Board, Requests, Jobs (selected), Schedule, Technicians, Clients, Assets, Quotes, Maintenance, Timesheets, Inventory, Billing, Reports, and Alerts. The main content area shows the job details, including a status bar with "In progress", "High", "HVAC Repair", "Scheduled", "In the field", "Review", "Sign-off", "Ready to bill", and "Invoiced". Below this is a "Move to: On hold" dropdown and an "Apply" button. The "Overview" tab is active, showing a "History" section with instructions: "Check belt tension and bearings first. Ask Rashid for the roof key." The job details table lists Client (Skypark Tower Management), Site (Skypark One, Gulberg Greens, Islamabad), Access (Report to the security desk at Gate 2. Parking in basement B1. Work permit needed for roof access.), Site contact (Rashid Mehmood), Assets (AST-00003 · AHU-3 Level 2), Skill needed (HVAC), and Client PO (—). The right-hand side features a "Schedule" card with Technician (Ahmed Raza), Team (A), Crew (—), Planned (15 Oct, 08:00 AM · 2h 00m), Due by (15 Oct, 09:09 PM), Checked in (15 Oct, 12:29 PM), and Finished (—). Below the schedule are "Reschedule" and "Crew" buttons. The "Customer sign-off" card shows "No sign-off yet." and the "Additional work" card shows "None requested."

AxisField
AxisField Services

AHU-3 fan vibration and noise
JOB-00010 · Skypark Tower Management · Skypark One, 2nd Floor

Search...

Edit Assign More

In progress High HVAC Repair Scheduled In the field Review Sign-off Ready to bill Invoiced

Move to: On hold Apply

Overview Checklist & photos Parts (0) Time & cost

History

Instructions: Check belt tension and bearings first. Ask Rashid for the roof key.

Client	Skypark Tower Management 051 2345601
Site	Skypark One, Gulberg Greens, Islamabad
Access	Report to the security desk at Gate 2. Parking in basement B1. Work permit needed for roof access.
Site contact	Rashid Mehmood 0333 4400111
Assets	AST-00003 · AHU-3 Level 2
Skill needed	HVAC
Client PO	—

Schedule

Technician	Ahmed Raza
Team	A
Crew	—
Planned	15 Oct, 08:00 AM · 2h 00m
Due by	15 Oct, 09:09 PM
Checked in	15 Oct, 12:29 PM
Finished	—

Reschedule Crew

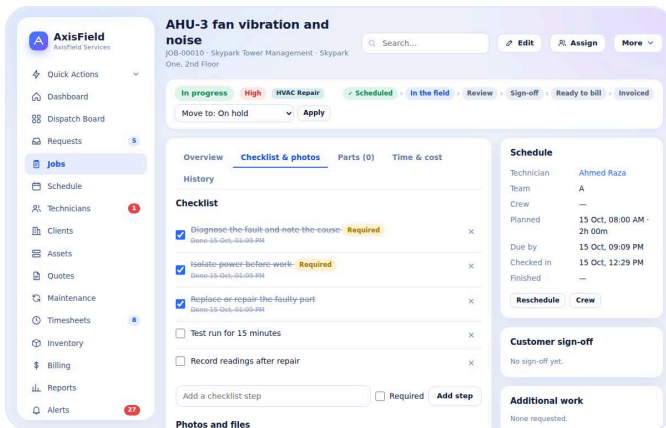
Customer sign-off

No sign-off yet.

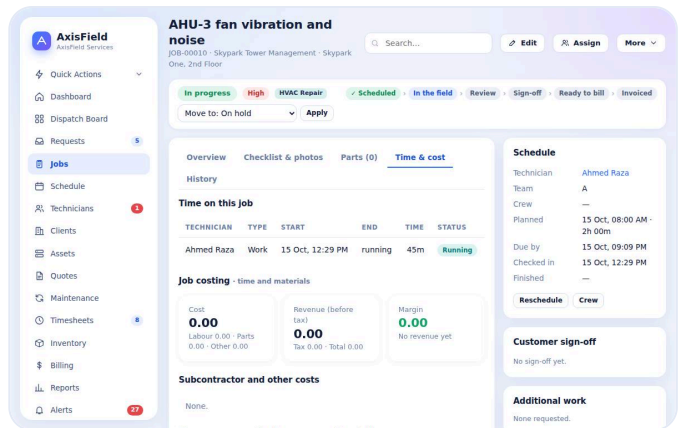
Additional work

None requested.

An in-progress job

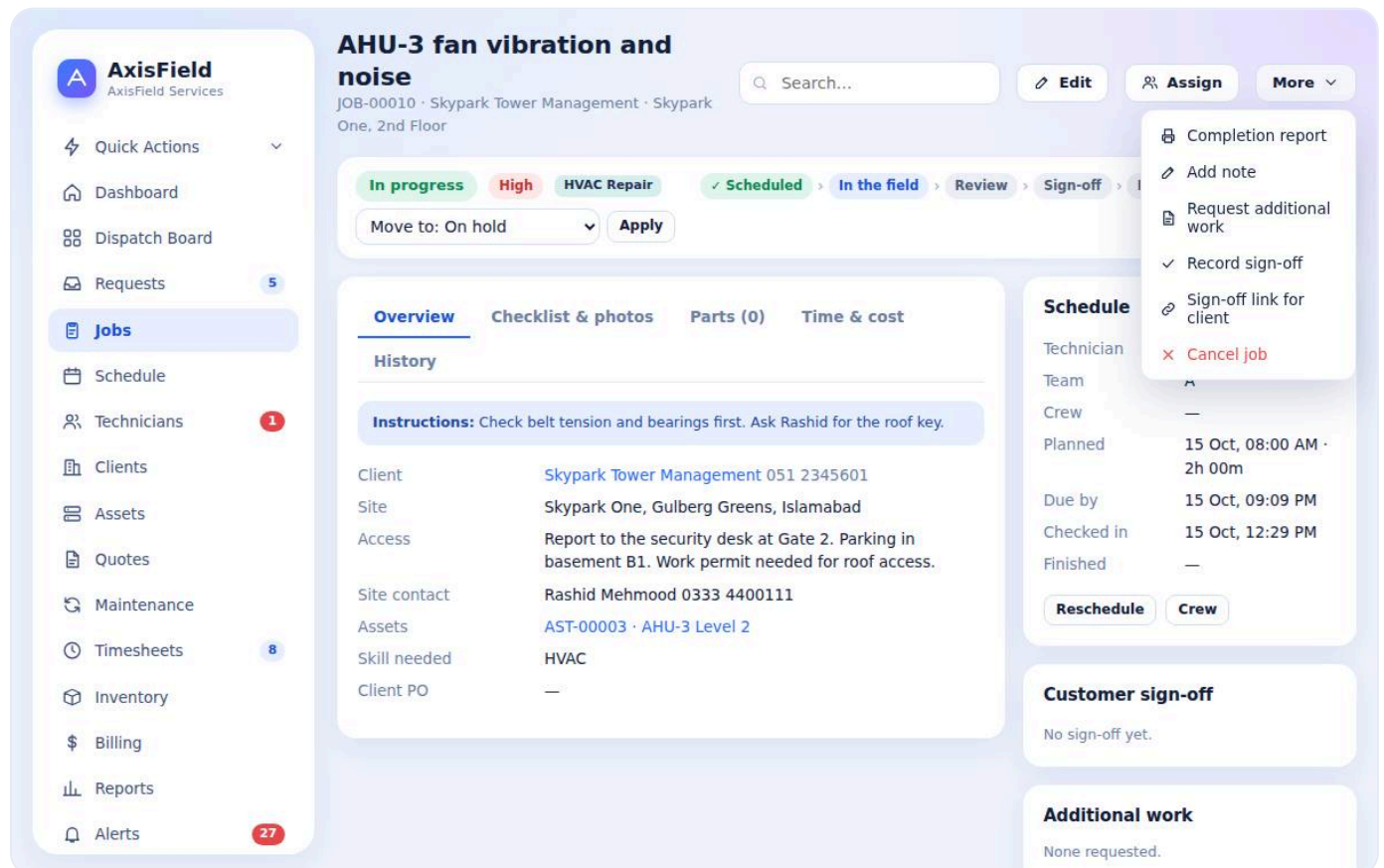


Checklist and photos



Time and cost

You can move the status from the box under the badges (for example *Move to: On hold* then **Apply**). The menu **More** (4) holds: completion report, add note, request additional work, record sign-off, sign-off link for the client, cancel job.

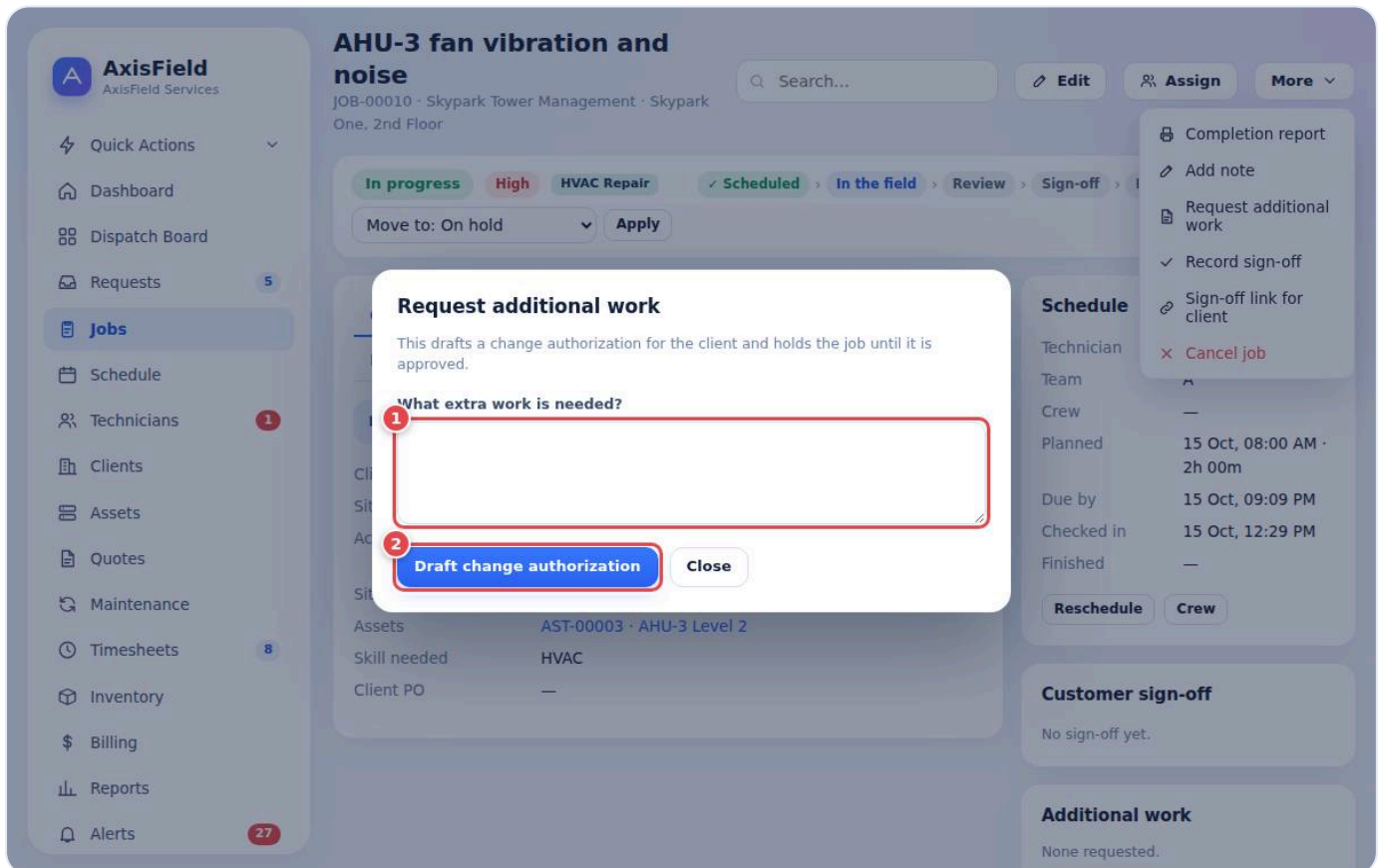


The More menu

7.6 Additional work found on site (change authorization)

- 1 The technician presses **Extra work** on the phone, or you open **More, Request additional work** (1) and describe the extra work.

- 2 The job goes **On hold** and a draft **change authorization** quote is created. Press **Draft change authorization** (2).
- 3 Open the quote, add lines and prices, and send it to the client (chapter 12).
- 4 When the client approves (or declines), the job is taken off hold automatically and the technician can continue. Approved extra work is billed with the job.



Requesting additional work

7.7 Review, sign-off and report

- 1 When the technician presses **Complete job** the status becomes **Awaiting review**. A supervisor opens the job and presses **Review**.
- 2 Choose **Approve** to accept the work, or **Send back to technician** with a note.
- 3 For the client's **sign-off** use one of three ways: the technician takes the signature on the phone; you record it under **More, Record sign-off** (name, rating, comments); or you press **Sign-off link for client** and send the link by message. The client opens it on their phone and signs.
- 4 After sign-off the job becomes **Ready to bill**.

- 5 **Completion report** (in More) is a printable page with the work done, parts, photos and signature. Use the browser's Print / Save as PDF.

AxisField
AxisField Services

Quick Actions
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Alerts

Fire pump weekly run test
JOB-00007 · Skypark Tower Management · Skypark Plaza Basement

Search... Review More

Awaiting review Medium Safety Audit
Scheduled In the field Review Sign-off Ready to bill Invoiced

Overview Checklist & photos Parts (0) Time & cost

Supervisor review
Check the checklist, photos, parts and time before approving.

Note
1 Required when sending back

Approve Send back to technician Close

Schedule

Technician	Imran Qureshi
Team	C
Crew	—
Planned	14 Oct, 09:00 AM · 2h 00m
Due by	17 Oct, 01:09 PM
Checked in	14 Oct, 09:00 AM
Finished	14 Oct, 10:15 AM

Customer sign-off
No sign-off yet.

Additional work
None requested.

Supervisor review

AxisField
AxisField Services

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Server room UPS bypass test
JOB-00008 · Technicians Office · Wexham HQ, Floor 2

Search... More

Awaiting sign-off Medium Electrical
Scheduled In the field Review Sign-off Ready to bill Invoiced

Record customer sign-off

Signer's name * Rating

Role or company

Comments

Save sign-off Close

Schedule

Technician	A
Team	—
Crew	—
Planned	13 Oct, 02:00 PM · 1h 30m
Due by	17 Oct, 01:09 PM
Checked in	13 Oct, 02:00 PM
Finished	13 Oct, 03:10 PM

Customer sign-off
No sign-off yet.
Reviewed by Nadia Ansari · 13 Oct, 06:10 PM

Additional work
None requested.

Recording a sign-off

AxisField Services
+92 51 111 090 123 service@example.com

Fire pump weekly run test
JOB-00007 · Skypark Tower Management · Skypark Plaza Basement

Work completed as per checklist. Area cleaned and handed over.

- ✓ Check extinguishers and tags
- ✓ Test alarm panel and sounders
- ✓ Check emergency lights
- ✓ Inspect exits and signage
- ✓ Photograph findings

Confirm the work is complete

Your name * Role

How did we do? *

Comments

Signature

Clear

Sign off

The client's sign-off link

AxisField

AxisField Services

Quick Actions

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Job completion report

JOB-00006

Q Search...

Print or save as PDF

AxisField Services

Plot 14, Blue Area, Islamabad

+92 51 111 000 123 service@example.com

Job completion report

JOB-00006

Issued 15 Oct 2026

Client	NexGen Offices	Technician	Sana Malik
Site	NexGen HQ, Floor 5 Blue Area, Plot 9, Islamabad	Arrived	13 Oct, 02:00 PM
Job	Server room UPS bypass test (Electrical)	Completed	13 Oct, 03:10 PM
Client PO	—	Assets	AST-00019 Server room UPS

Technician's notes

Work completed as per checklist. Area cleaned and handed over.

Checklist

✓ Isolate and lock out the supply	13 Oct, 03:10 PM
✓ Inspect panel, breakers and terminations	13 Oct, 03:10 PM
✓ Torque check connections	13 Oct, 03:10 PM
✓ Thermal scan under load	13 Oct, 03:10 PM
✓ Test earth and insulation	13 Oct, 03:10 PM
✓ Label and tidy cabling	13 Oct, 03:10 PM

Time on site

TECHNICIAN	WORK TIME	TRAVEL
Sana Malik	1h 10m	30m

Customer sign-off

Not signed off yet.

The completion report

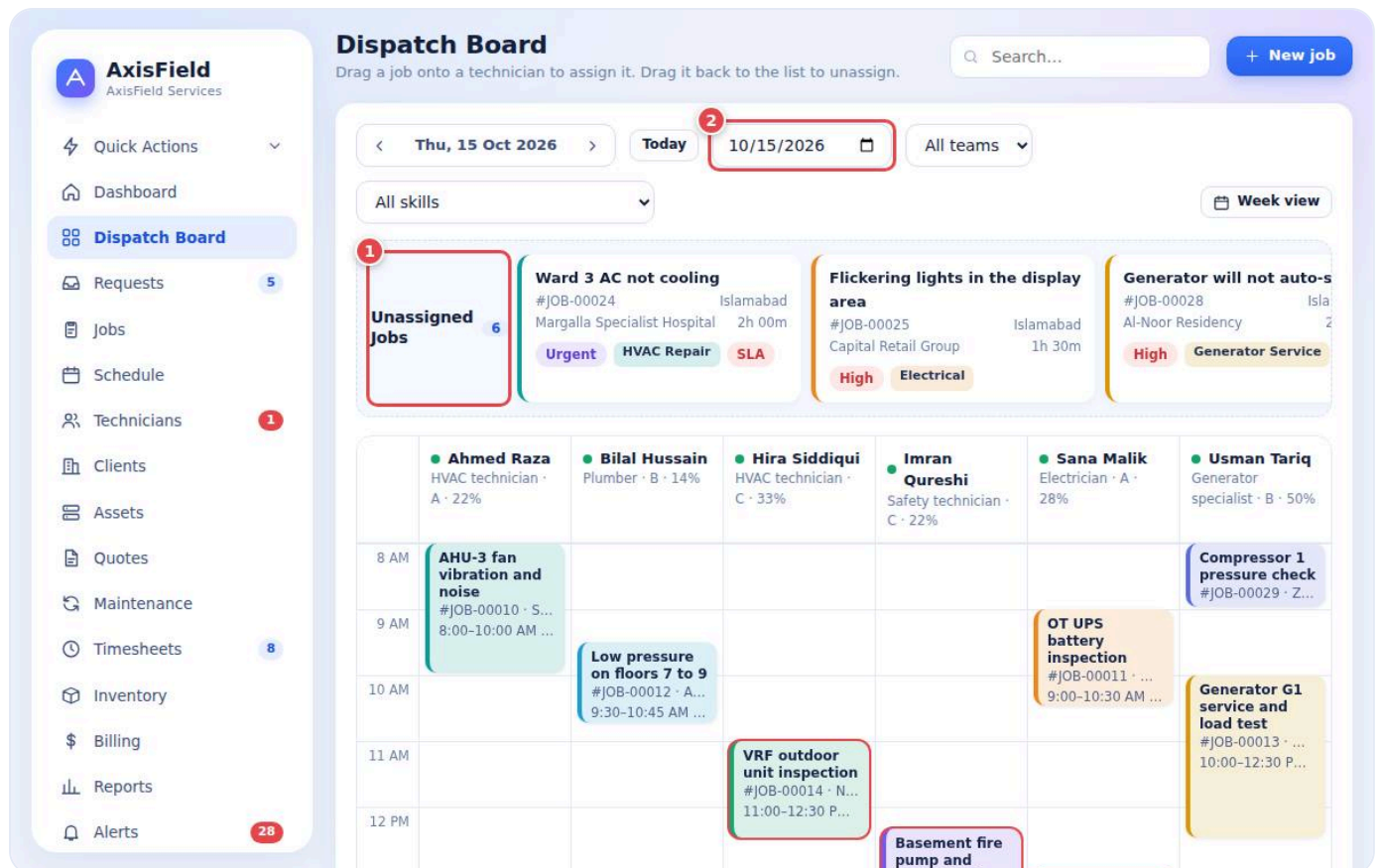
7.8 Cancel a job

Open **More, Cancel job** and give a reason. A cancelled job stays in history.

8.1 The dispatch board

The board shows who is doing what today. The **left panel** lists **Unassigned Jobs** (1) with priority and SLA badges. The **columns** are your technicians with their jobs on a time line. A red line marks the current time.

- 1 Pick the **day** (2) with the arrows or the date box. **Today** jumps back.
- 2 Filter by **team** and **skill** to focus on one trade.
- 3 **Drag** an unassigned job onto a technician's column at the time you want. The system checks skill, hours, leave and clashes.
- 4 If there is a problem, a box lists the warnings and asks *Assign anyway?* Choose **OK** to go ahead, or **Cancel** and choose another slot.
- 5 To move a job drag it to another time or technician. To unassign, drag it back to the left panel.
- 6 Click a job to open it.

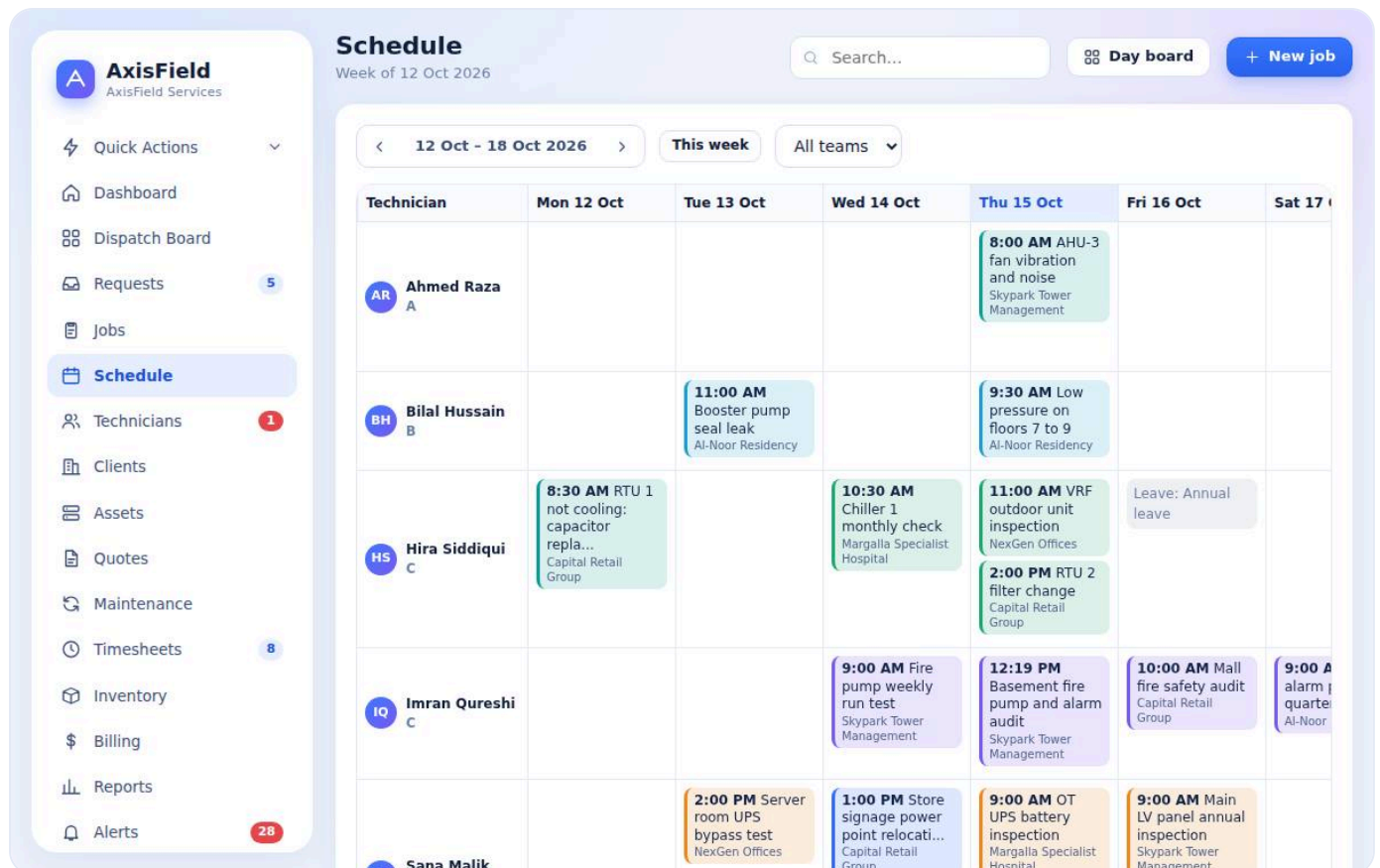


The dispatch board

Colours: left border = priority; the badge shows the job type; *SLA* means the due time is close or passed. A technician name in light colour is off or on leave that day.

8.2 The schedule (calendar)

Schedule shows jobs on a calendar, by week or day, so you can see the load per technician and spot gaps. Use it to plan ahead; use the board for today's assignments.



The schedule calendar

8.3 Late check-ins and alerts

If a technician has not started (still *Scheduled*) after the planned start plus the grace time in Settings, the job shows as a **late check-in** on the dashboard and in **Alerts**. Call the technician or reassign the job.

9

The technician mobile app

Technician

The technician app is a web app that works like a phone app. It keeps working without signal and sends your changes when the signal returns.

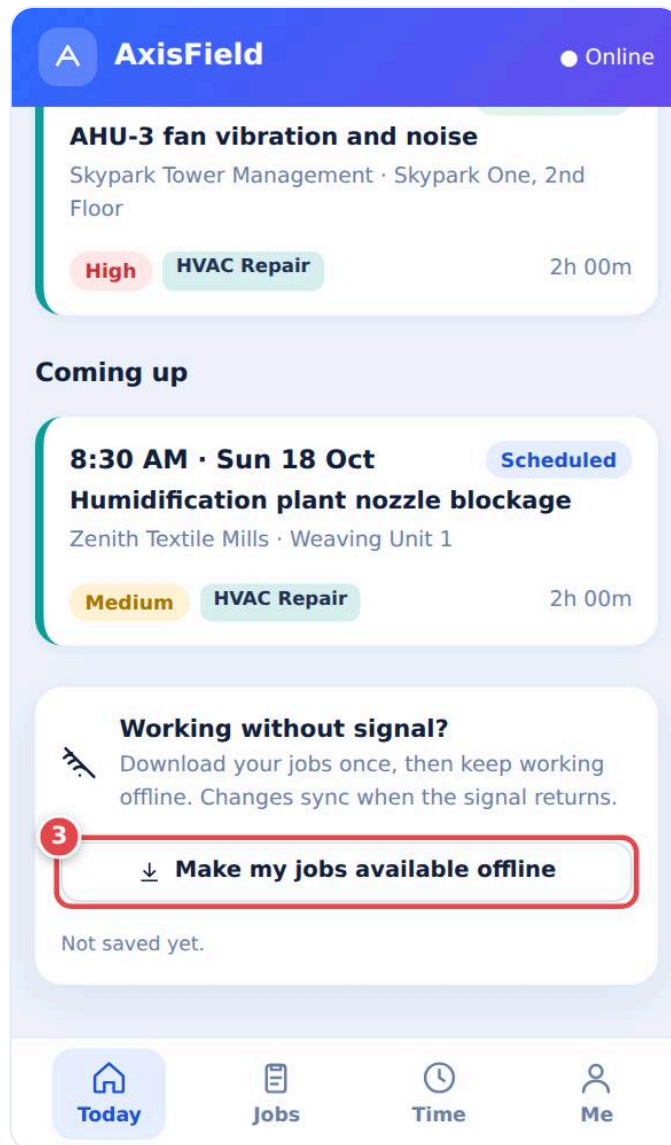
9.1 Install it on your phone

- 1 Open the sign-in address your company gave you in **Chrome** (Android) or **Safari** (iPhone).
- 2 Sign in with your email and password. After you sign in you land on **Today**.
- 3 **Android:** tap the browser menu (three dots) and choose **Add to Home screen** or **Install app**. **iPhone:** tap the Share button and choose **Add to Home Screen**.
- 4 Open it from the new icon. It opens full screen like any app.

No account yet? Apply at </technician/join>. You can sign in as soon as the office approves you (chapter 4).

9.2 The Today screen

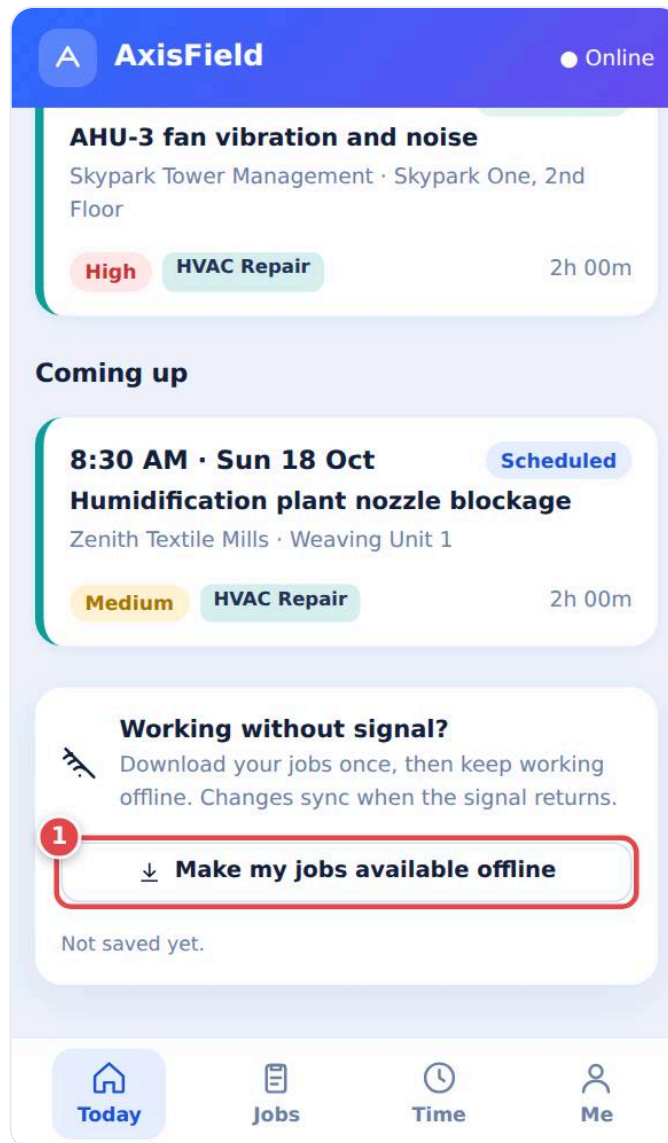
The blue box shows the job you are working on with a running timer (1) and buttons **Open job** and **Take a break** (2). Below you see your jobs for today and coming up, with time, client, priority and job type. The four icons at the bottom are **Today, Jobs, Time** and **Me**.



Today

9.3 Before you go to a site with weak signal

- 1 While you have signal, open **Today** and scroll to the bottom.
- 2 Press **Make my jobs available offline** (1). The app saves your jobs so you can open them without signal.
- 3 Work as normal. A bar shows *Offline. N changes saved on this phone*. When the signal returns the bar says *Syncing* and then disappears.

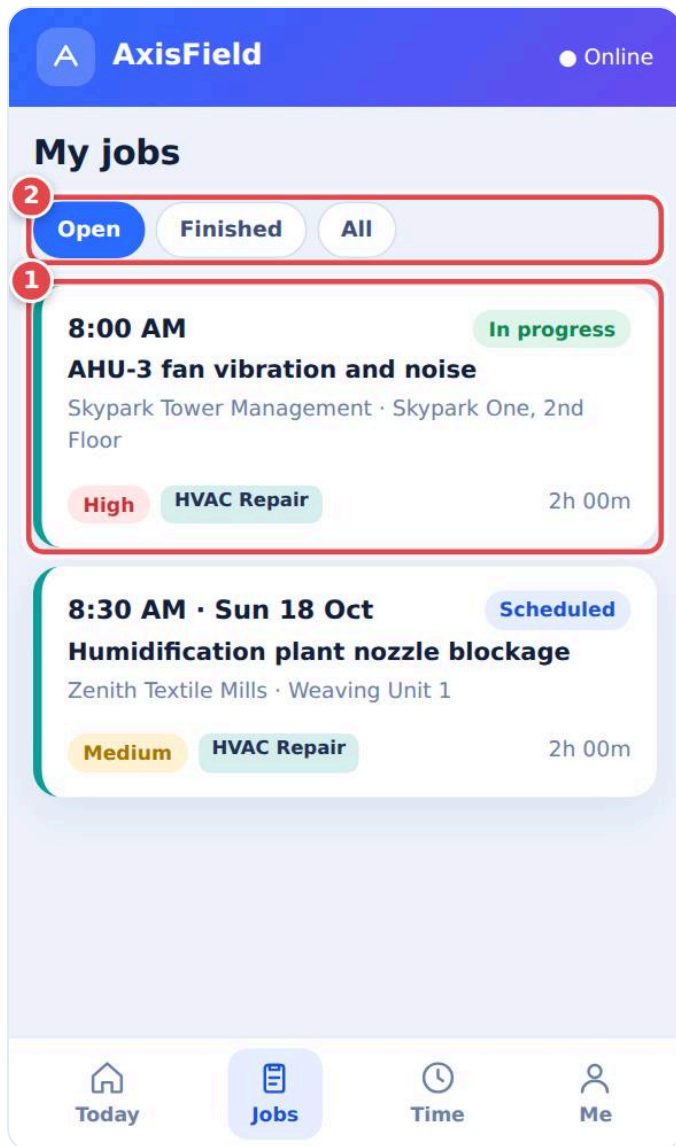


Make my jobs available offline

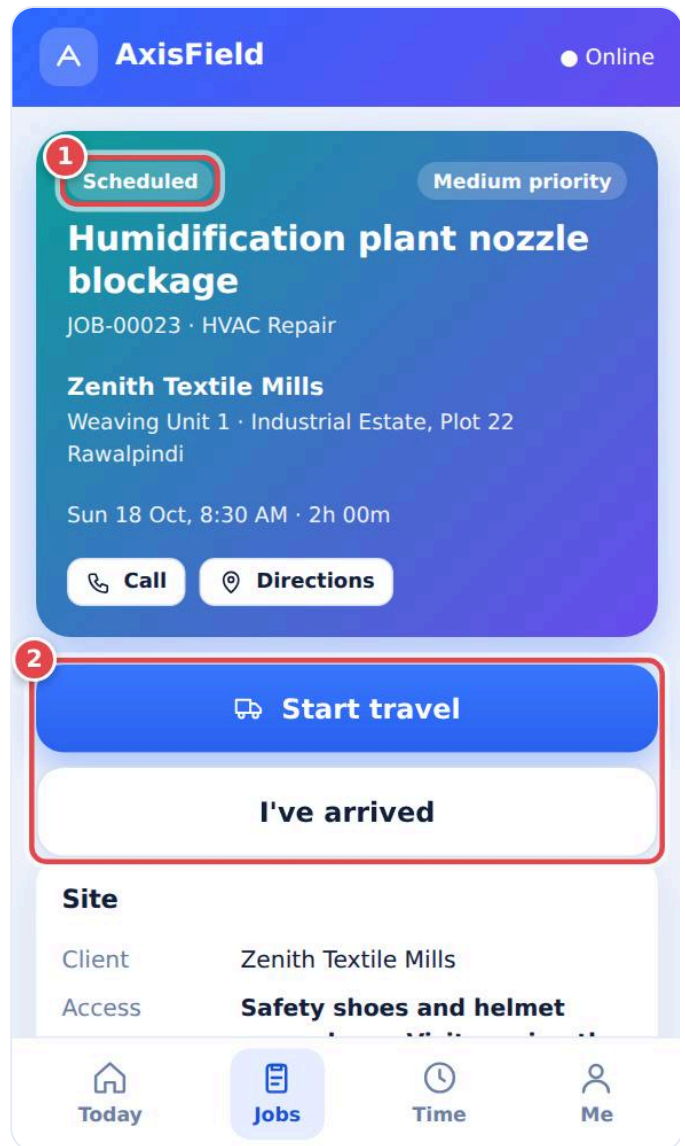
Each change is sent only once even if the phone retries, so you never create duplicates. If a job was reassigned to someone else while you were offline, your change to it is refused and the app tells you.

9.4 Working a job, step by step

- 1 Open **Jobs** (1) and tap a job. The top card shows the client, site, planned time and the buttons **Call** and **Directions**. If the customer shared their location the card also has a **Client location** link.
- 2 Tap **Start travel** (2). The status becomes *En route* and travel time starts.
- 3 When you arrive tap **I've arrived**. Then tap **Start work**. Work time starts.



Your jobs



The job card: Start travel

- 1 Read **The job, Instructions** and **Site** (access, contact person, assets).
- 2 **Checklist:** tick each step as you finish it (1). **Required** steps must be ticked before you can complete the job. The counter (2) shows progress.
- 3 **Photos:** choose *Before*, *During* or *After* and tap **Add photo**. Take the picture; it is shrunk to save data.
- 4 **Parts used:** tap **Add part**, choose the part from your van stock, set the quantity and tap **Add**.
- 5 **Notes:** type a note for the office and tap **Save**.

A

AxisField

● Online

Access

Report to the security desk at Gate 2. Parking in basement B1. Work permit needed for roof access.

Contact

Rashid Mehmood 0333 4400111

Assets

AHU-3 Level 2 AST-00003

Trane CSAA012 · S/N TR-55120

Checklist

2 of 5 done

1

☒ Diagnose the fault and note the cause

Required

☒ Isolate power before work

Required

☒ Replace or repair the faulty part

☐ Test run for 15 minutes

Today

Jobs

Time

Me

Checklist

A

AxisField

● Online

Photos

1

During

2

Add photo

No photos yet. Take before and after photos.

Parts used

+ Add part

None recorded.

Notes

Add a note for the office

Save

Customer sign-off

Get signature

Not signed yet.

Today

Jobs

Time

Me

Photos

AxisField Online

Photos During Add photo

Add a part

Part
1 Choose... ▼

Quantity
1

Note

2 Add Back

Not signed yet.

Today Jobs Time Me

Add a part

AxisField Online

Photos During Add photo

No photos yet. Take before and after photos.

Parts used + Add part

None recorded.

Notes

1 Add a note for the office 2 Save

Customer sign-off Get signature

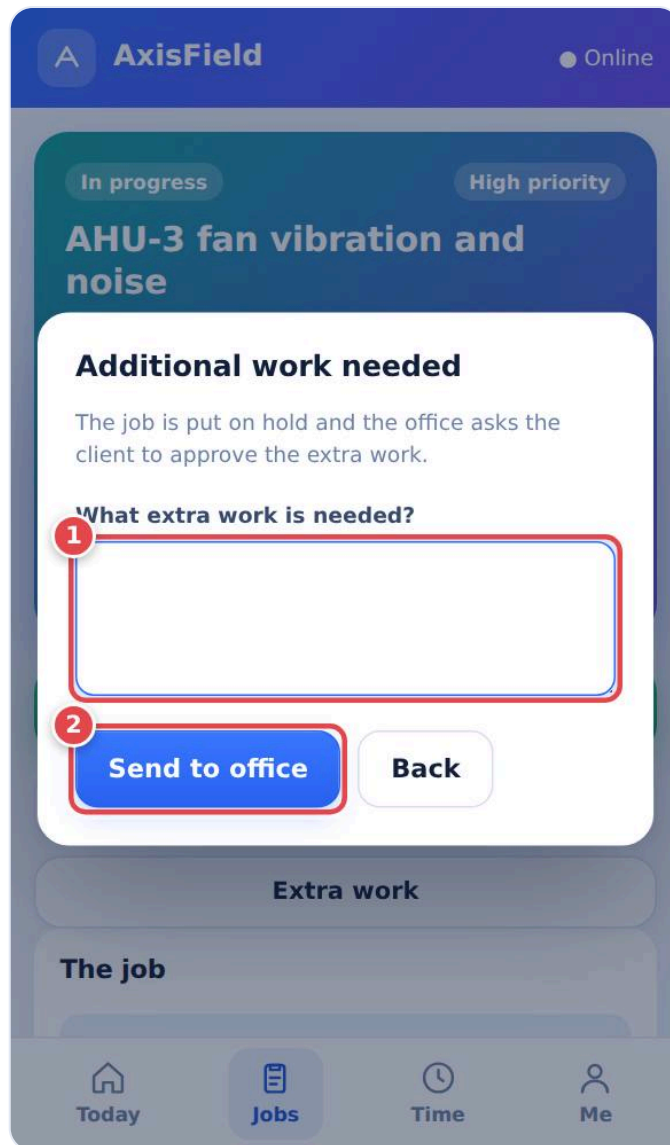
Not signed yet.

Today Jobs Time Me

Notes

Extra work that was not planned

Tap **Extra work**, describe what is needed and send. The job goes **On hold** and the office asks the client to approve. When approved the job is released and you continue. While the job is on hold the app says it is waiting for the client.



Additional work needed

Finishing

- 1 Tap **Complete job**. If a required step is not ticked the app warns you.
- 2 Write what was done (1) and tap **Mark complete** (2).
- 3 Ask the client to sign: tap **Get signature**, let the client type their name, give stars and draw a signature with a finger (2), then **Save sign-off** (3).
- 4 The job moves to *Awaiting review*. Your timer stops.

AxisField Online

In progress High priority

AHU-3 fan vibration and noise

Complete this job

1 What was done? (optional)

Work carried out, readings, anything the office should know

Tip: get the customer's signature before you leave.

2 Mark complete Back

Extra work

The job

Today Jobs Time Me

Complete this job

AxisField Online

Rashid Mehmood

1 Role or company

How did we do?

☆ ☆ ☆ ☆ ☆

Comments

Signature

2

3 Save sign-off Back

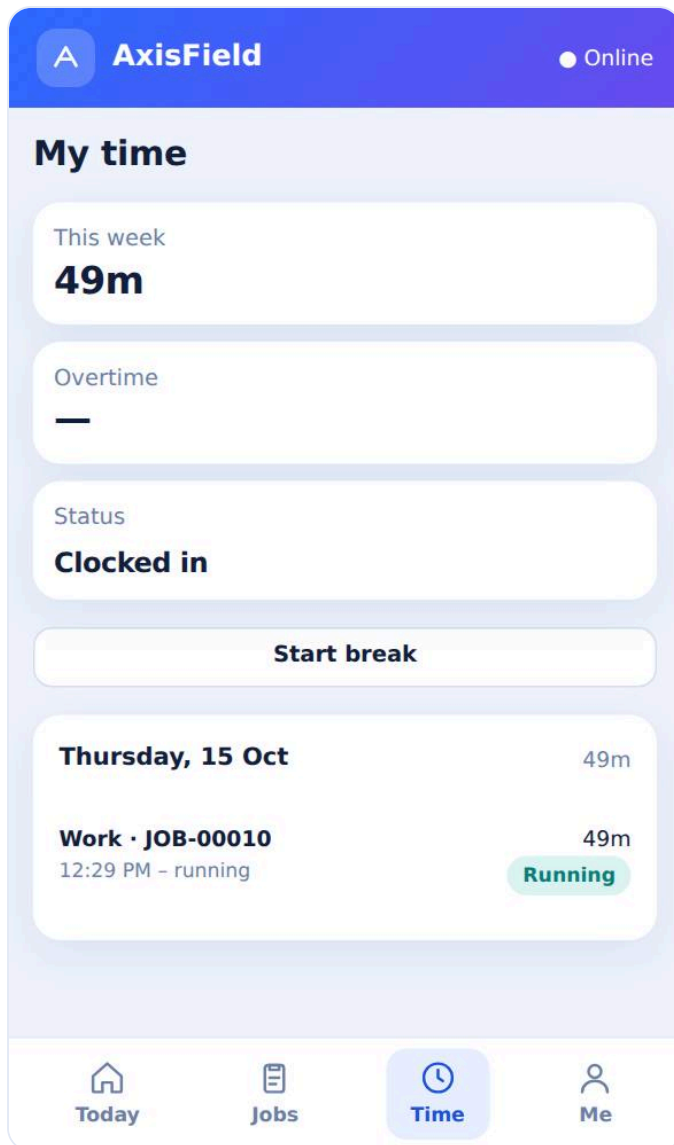
Clear

Today Jobs Time Me

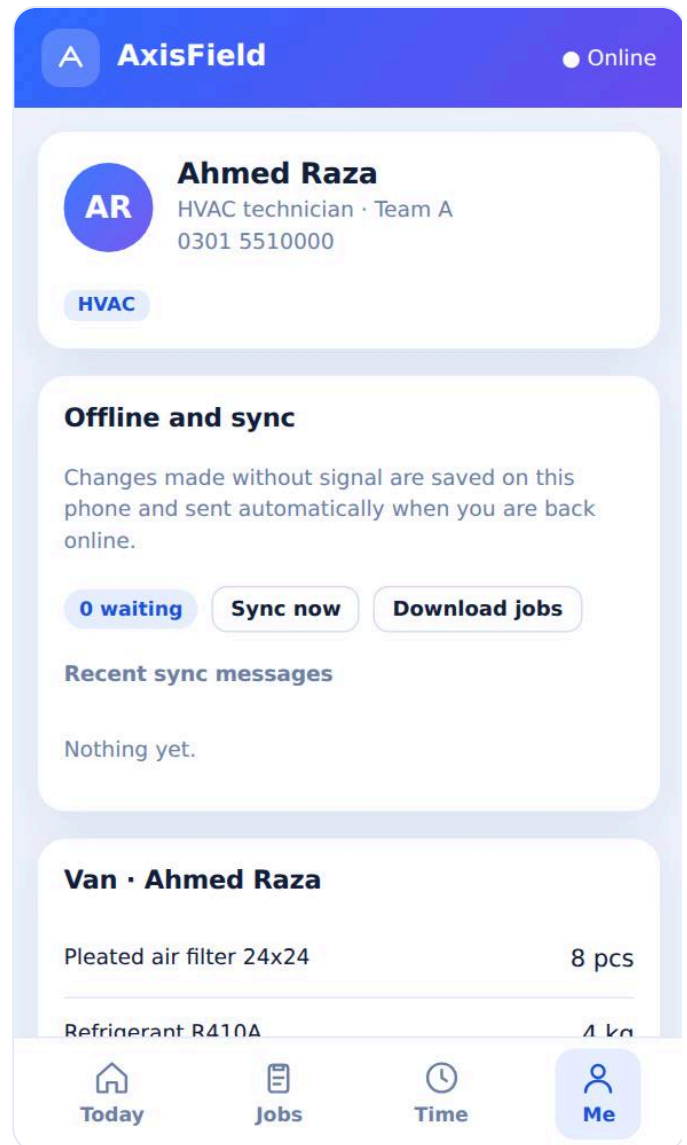
Customer sign-off

9.5 Breaks, time and your profile

- **Take a break** on the Today screen pauses work time and records the break. Tap again to resume.
- **Time** lists your timesheet lines by day (work, travel, break, overtime) and their approval status. Lines are *submitted* when the job is completed and approved by a supervisor.
- **Me** shows your details, skills, today's summary and a sign-out button.



Your timesheet

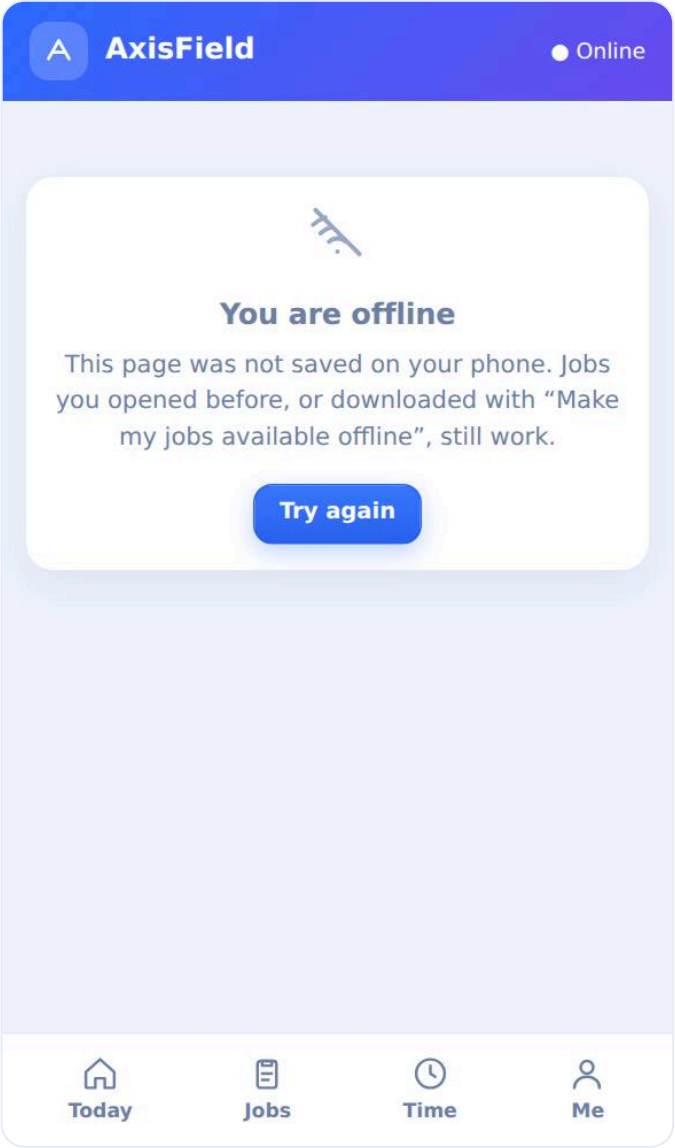


Me

9.6 When something goes wrong

Problem	What to do
"Your session expired" bar	Tap Sign in again . Your changes are kept on the phone and sent after you sign in.
A job opens as "Offline" page	That job was not saved. Next time use Make my jobs available offline while you have signal.
Photo does not upload	It stays in the outbox and sends automatically with signal. Keep the app installed.

You cannot change the status	Only the lead technician moves a job. Crew members can see the job.
------------------------------	--



The offline page

10.1 How time is recorded

Nobody types hours. Timesheet lines are created from what the technician does on the phone:

Technician action	Line created
Start travel → I've arrived	Travel
Start work → Complete job	Work
Take a break → resume	Break (not counted as work)

Times come from the phone's clock (even when offline) and are stored in your company's time zone. When a job is completed its lines are *submitted* for approval.

10.2 Approve timesheets

- 1 Open **Timesheets**. The number in the menu tells you how many are waiting.
- 2 Use the filters (date, technician, status). The summary at the top shows worked hours, overtime, breaks and pending lines per technician.
- 3 Tick the lines you want (1) and press **Approve selected** (2) or **Reject selected**. You can also press **Approve** on a single line.
- 4 If a technician forgot to record time, use **Add and approve** to add the missing line by hand.
- 5 Approved lines feed job costing and payroll reports.

AxisField

AxisField Services

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Timesheets

Review and approve technician time

10/12/2026

to

10/18/2026

All technicians

Pending approval (8)

Any type

Show

TECHNICIAN	WORK + TRAVEL	OVERTIME	BREAKS	PENDING ENTRIES
Ahmed Raza	0m	—	0m	—
Bilal Hussain	1h 55m	—	0m	—
Hira Siddiqui	4h 30m	—	0m	2
Imran Qureshi	1h 45m	—	0m	2
Sana Malik	3h 05m	—	0m	2
Usman Tariq	1h 10m	—	0m	1

Select all pending

Approve selected

Reason (to reject)

Reject selected

TECHNICIAN	DATE	JOB	TYPE	START - END	TIME	STATUS
Sana Malik	Wed 14 Oct	JOB-00009	Travel · sync	12:30 PM - 01:00 PM	30m	Pending approval
Sana Malik	Wed 14 Oct	JOB-00009	Work · sync	01:00 PM - 01:55 PM	55m	Pending approval
Usman Tariq	Thu 15 Oct	JOB-00029	Work	11:59 AM - 01:09 PM	1h 10m	Pending approval
Hira Siddiqui	Wed 14 Oct	JOB-00008	Travel · sync	10:00 AM - 10:30 AM	30m	Pending approval
Hira Siddiqui	Wed 14 Oct	JOB-00008	Work · sync	10:30 AM - 12:25 PM	1h 55m	Pending approval
Imran Qureshi	Wed 14 Oct	JOB-00007	Travel · sync	08:30 AM - 09:00 AM	30m	Pending approval
Imran Qureshi	Wed 14 Oct	JOB-00007	Work · sync	09:00 AM - 10:15 AM	1h 15m	Pending approval

Approving timesheets

10.3 Overtime

Settings has **Overtime after (hours per day)** and the **multiplier**. For each technician and day, hours beyond the limit are marked overtime and costed at the multiplier (for example 1.5 times the hourly cost). Overtime shows in the timesheet summary and in the job cost.

11 Inventory

Dispatcher

Supervisor

Administrator

Inventory tracks parts in **warehouses** and in each technician's **vehicle**, reserves them for jobs and records what was consumed.

11.1 Set up locations and parts

- 1 Open **Inventory, Locations** and add your **warehouse**. Add a **vehicle** location for each van and link it to its technician.
- 2 Open **Parts** and press **Add part**. Type the **SKU** (1), **name** (2), unit, unit cost and sell price. Set the **minimum** (reorder level) and **par** (target level) used for replenishment (3).

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Stock Locations

Warehouses and technician vehicles

Search...

+ Add stock location

LOCATION	TYPE	TECHNICIAN	LINES	STATUS	
Main Warehouse	Warehouse	—	14	Active	Edit
Van · Ahmed Raza	Vehicle	Ahmed Raza	4	Active	Edit
Van · Bilal Hussain	Vehicle	Bilal Hussain	1	Active	Edit
Van · Hira Siddiqui	Vehicle	Hira Siddiqui	2	Active	Edit
Van · Sana Malik	Vehicle	Sana Malik	4	Active	Edit
Van · Usman Tariq	Vehicle	Usman Tariq	4	Active	Edit

Stock locations

Parts
The parts catalogue. Stock quantities are managed under inventory.

SKU	PART	CATEGORY	COST	PRICE	IN STOCK	STATUS
AF-VLV-050	Brass gate valve 2 in	Plumbing	1,400.00	2,100.00	14 pcs	Active
AF-CON-032	Contactor 32A 3-pole	Electrical	2,100.00	3,200.00	17 pcs	Active
AF-CAB-016	Copper cable 16 mm²	Electrical	280.00	420.00	268 m	Active
AF-THM-DIG	Digital thermostat	HVAC	3,200.00	4,600.00	9 pcs	Active
AF-OIL-15W	Engine oil 15W-40	Generator	750.00	1,050.00	132 L	Active
AF-FFL-PK1	Fuel filter (Perkins)	Generator	1,600.00	2,400.00	10 pcs	Active
AF-FUS-HRC	HRC fuse 63A	Electrical	350.00	560.00	47 pcs	Active
AF-MCB-063	MCB 63A 3-pole	Electrical	1,800.00	2,700.00	15 pcs	Active
AF-OFL-PK1	Oil filter (Perkins)	Generator	1,100.00	1,700.00	11 pcs	Active

Parts

Add part

SKU *
Name *

Category Unit * Cost price * Sell price *

Warehouse reorder level *
0

Active

Add part Cancel

Adding a part

11.2 See what you have

Inventory lists every part with quantity per location, what is reserved for open jobs and what is available. Low stock shows in colour. **Adjust** corrects a count after a stock-take (give a reason).

Inventory
Stock in warehouses and on vehicles

+ Receive stock

Parts: **14**

Stock value (at cost): **513,090.00**

Low in warehouse: **2**
Reorder soon

Quick links: Parts, Locations, Movements

Search SKU, name, category [] Low stock only Search

PART	MAIN WAREHOUSE	VEH VAN · AHMED RA...	VEH VAN · BILAL HU...	VEH VAN · HIRA SID...	VEH VAN · ...
Brass gate valve 2 in AF-VLV-050 · pcs · reorder at 6	12		2		
Contactor 32A 3-pole AF-CON-032 · pcs · reorder at 8	14				
Copper cable 16					

Inventory overview

11.3 Receive stock

- 1 Open **Receive stock** (Quick Actions or Inventory).
- 2 Choose the **location** (1), the part and the **quantity** (2). Add a reference such as the supplier invoice.
- 3 Save. The quantity goes up and a movement is logged.

AxisField
AxisField Services

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Receive stock

Add purchased parts to a warehouse or vehicle

Search...

Part *
1 Choose...

Into location *
Main Warehouse

Quantity *
2

Supplier invoice or PO
Note

Receive Cancel

Receiving stock

11.4 Move stock to a van

Use **Transfer**: choose where from, where to, the part and quantity. Parts used on a job are taken from the technician's vehicle, or from the first warehouse when there is no vehicle, so keep vans stocked.

AxisField
AxisField Services

Transfer stock
Move parts between locations, for example warehouse to vehicle

Search...

Part *
Choose...

From * Main Warehouse **To *** Main Warehouse

Quantity * **Reference**

Transfer **Cancel**

Transfer stock

11.5 Reservations and consumption

- When you add a part to a job's **Parts** tab you choose **Reserve** (set aside for the job) or **Use** (consumed now). Reserved quantities cannot be promised to another job.
- When the technician adds the part on the phone, the quantity is **consumed** from the vehicle and the cost goes on the job.
- Every change is listed under **Movements**.

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Stock movements

Every receipt, transfer, use and adjustment

Search...

All parts

All locations

All types

Filter

WHEN	PART	LOCATION	TYPE	QTY	REFERENCE	BY
15 Oct, 01:09 PM	Copper cable 16 mm²	Van · Sana Malik	Consumption	-12.00	JOB-00009	
15 Oct, 01:09 PM	Pleated air filter 24x24	Van · Hira Siddiqui	Consumption	-2.00	JOB-00008	
15 Oct, 01:09 PM	Pump mechanical seal	Van · Bilal Hussain	Consumption	-1.00	JOB-00005	
15 Oct, 01:09 PM	Refrigerant R410A	Van · Hira Siddiqui	Consumption	-1.50	JOB-00004	
15 Oct, 01:09 PM	Run capacitor 45 µF	Van · Hira Siddiqui	Consumption	-1.00	JOB-00004	
15 Oct, 01:09 PM	HRC fuse 63A	Van · Sana Malik	Consumption	-3.00	JOB-00003	
15 Oct, 01:09 PM	Fuel filter (Perkins)	Van · Usman Tariq	Consumption	-1.00	JOB-00002	
15 Oct, 01:09 PM	Oil filter (Perkins)	Van · Usman Tariq	Consumption	-1.00	JOB-00002	
15 Oct, 01:09 PM	Engine oil 15W-40	Van · Usman Tariq	Consumption	-18.00	JOB-00002	
		Van · Ahmed				

Stock movements

11.6 Replenishment

Replenishment has two lists. **Refill vehicles from the warehouse** shows vans below their minimum: tick the lines and press **Transfer selected** to move stock up to the *par* level. **Reorder from suppliers** shows warehouse stock below its minimum, to buy.

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Replenishment

Vehicle stock at or below its minimum, and warehouse stock to reorder

1

Refill vehicles from the warehouse

VEHICLE	PART	ON HAND	MIN / PAR	NEEDED	WAREH
☒ Van · Ahmed Raza	Digital thermostat	1	1 / 2	1	
☒ Van · Bilal Hussain	Pump mechanical seal	0	1 / 2	2	
☒ Van · Usman Tariq	Fuel filter (Perkins)	1	2 / 4	3	
☒ Van · Usman Tariq	Oil filter (Perkins)	1	2 / 4	3	
Van · Usman Tariq	Starter battery 12V 100Ah	1	1 / 1	0	
☒ Van · Hira Siddiqui	Refrigerant R410A	-1	2 / 5	6	
☒ Van · Hira Siddiqui	Run capacitor 45 µF	1	2 / 4	3	

Reorder from suppliers

Run capacitor 45 µF

AF-CAP-045

reorder at 10

6

Starter battery 12V 100Ah

AF-BAT-12V

reorder at 3

2

Receive a delivery

Replenishment suggestions

12 Quotes and additional work

Dispatcher

Supervisor

Administrator

Client

Quotes (estimates) price work before it is done. They are also used for **change authorizations**, the extra work found on site.

12.1 Create a quote

- 1 Open **Quotes** and press **New quote**. Choose the **client** (1) and **site**, type a **title** and describe the **scope of work**.
- 2 Set **Valid until**, the **default markup %** and **Tax %**. The terms are copied from Settings and can be edited.
- 3 Add **lines** (2): choose the kind (labour, material or other), pick a part from stock or type a description, enter quantity and cost. The sell price is cost plus markup. Use **Add line** for more.
- 4 Save as **Draft**. You can edit it freely while it is a draft.

The screenshot displays the AxisField 'Quotes' management interface. On the left is a sidebar with navigation options: Quick Actions, Dashboard, Dispatch Board, Requests (5), Jobs, Schedule, Technicians (1), Clients, Assets, Quotes (selected), Maintenance, Timesheets (8), Inventory, Billing, Reports, and Alerts (28). The main header includes the 'Quotes' title, a subtitle 'Estimates and change authorizations', a search bar, and a '+ New quote' button with a notification badge. Below the header is a filter section with dropdowns for 'Number or title', 'Any status', 'Any type', and 'Any client'. The central part of the interface is a table listing four quotes with columns for Quote, Client, Type, Total, Valid Until, and Status.

QUOTE	CLIENT	TYPE	TOTAL	VALID UNTIL	STATUS
Booster pump set overhaul Q-00004	Al-Noor Residency	Estimate	82,824.00	14 Nov 2026	Draft
Three split AC units, supply and install Q-00003	NexGen Offices	Estimate	511,490.40	29 Oct 2026	Sent
Replace OT UPS battery bank Q-00002 · job JOB-00031	Margalla Specialist Hospital	Estimate	431,183.60	04 Nov 2026	Approved
Additional work: unloader valve replacement Q-00001 · job JOB-00029	Zenith Textile Mills	Change authorization	38,454.00	29 Oct 2026	Sent

The quote list

New quote
Labour, materials and markup

Search...

1 Client *
Choose...

Site
—

Title *
—

Linked job
None

Scope of work
—

Valid until
11/14/2026

Default markup %
20

Tax %
16

Lines

2

TYPE	PART	DESCRIPTION	QTY	UNIT	COST	MARKUP %	PRICE	AMOUNT
Labour	—			hr	20	0.00	0.00	×
Subtotal								0.00
Tax								0.00
Total								0.00
Your cost / margin cost 0.00 · margin 0.00								

3 + Add line

Price = cost plus markup. The client sees only price and amount.

Terms
Prices are valid for the period shown. Payment within 15 days of invoice.
Additional work needs written approval before it starts.

Save draft Cancel

Quote form with lines

12.2 Send it and record the decision

- 1 Open the quote and check the totals. Press **Mark as sent**. A link to the client's quote page is shown: copy it and send it by email or WhatsApp. You can also press Print for a paper copy.
- 2 The client opens the link, reads the quote and presses **Approve** (typing their name and ticking the agreement) or **Decline**. No account is needed.
- 3 If the client answers by phone, record it yourself under **Record the client's decision (Approve or Decline)**.
- 4 After approval press **Create work order** to turn the quote into a job. The approved price becomes the job's fixed price.

AxisField
AxisField Services

Booster pump set overhaul
Estimate - Al-Noor Residency

Search... Edit Print Mark as sent

AxisField Services
Plot 14, Blue Area, Islamabad
+92 51 111 000 123 service@example.com

Quotation
Q-00004
Issued 15 Oct 2026 - valid until 14 Nov 2026

Prepared for
Al-Noor Residency
DHA Phase 2, Islamabad
Site: Tower A and B, DHA Phase 2, Sector C, Islamabad

Reference
Booster pump set overhaul

DESCRIPTION	QTY	UNIT PRICE	AMOUNT
Overhaul kit Material	1 set	50,400.00	50,400.00
Labour Labor	10 hr	2,100.00	21,000.00
Subtotal			PKR 71,400.00
Tax (16%)			PKR 11,424.00
Total			PKR 82,824.00

Draft

Your cost: PKR 48,000.00
Margin: PKR 23,400.00 (32.8%)
Created by: Faizal Dar
Sent: Not yet

Client link
http://127.0.0.1:8020/q/vxix9gxaeKvz
Anyone with this link can approve or decline.

Record the client's decision

Decided by: Jamil Ahmed
How: Phone
Note:
Approve Decline
Delete draft

A quote

AxisField Services
+92 51 111 000 123 service@example.com

Change authorization
Q-00001
Issued 15 Oct 2026 - valid until 29 Oct 2026

Prepared for
Zenith Textile Mills
Industrial Estate, Faisalabad Road, Rawalpindi
Site: Weaving Unit 1, Industrial Estate, Plot 22, Rawalpindi

Reference
Additional work: unloader valve replacement
Job JOB-00029

Unloader valve is worn and should be replaced before it fails. Estimated half a day plus parts.

DESCRIPTION	QTY	UNIT PRICE	AMOUNT
Replace unloader valve (half day) Labor	4 hr	2,275.00	9,100.00
Unloader valve kit Material	1 pcs	24,050.00	24,050.00
Subtotal			PKR 33,150.00
Tax (16%)			PKR 5,304.00
Total			PKR 38,454.00

Your decision

1 Your name * 2 Comment

3 I am authorised to approve this quote for Zenith Textile Mills and accept the terms.

Approve quote Decline

What the client sees

Fixed price or time and materials? A job linked to an approved quote is billed at the quote price. A job without a quote is billed at actual labour, parts and extras. Approved change authorizations are always added.

13 Maintenance contracts

Dispatcher

Supervisor

Administrator

A maintenance contract (planned maintenance) creates the recurring visits for you, so servicing is never forgotten.

13.1 Create a contract

- 1 Open **Maintenance** and press **New contract**. Choose the **client** (1) and site and write a **title** and the **scope of work**.
- 2 Choose the **frequency** (2): weekly, every 2 weeks, monthly, quarterly, every 6 months or annual, and the **start date** (3) and optional end date. The **next visit** is set from the start date.
- 3 Choose the **job type**, **preferred start time**, **visit length**, the usual **technician** or team, and tick the **assets covered**.
- 4 Enter the **annual value**, **renewal term** in months and **renewal notice** days. Save.

CONTRACT	CLIENT / SITE	FREQUENCY	NEXT VISIT	ENDS	ANNUAL VALUE	STATUS
Quarterly HVAC preventive maintenance MC-0001	Skypark Tower Management Skypark One, 2nd Floor	Quarterly	21 Oct 2026	15 Aug 2027	480,000.00	Active
Monthly generator service and load test MC-0002	Margalla Specialist Hospital Generator Yard	Monthly	18 Nov 2026	22 Nov 2026 Renew	720,000.00	Active
Half-yearly panel thermography MC-0003	Zenith Textile Mills Weaving Unit 1	Every 6 months	24 Nov 2026	15 Jun 2027	260,000.00	Active

Maintenance contracts

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New maintenance contract

Search...

Client *
1 Choose... **Site**
—

Title *
Quarterly HVAC preventive maintenance **Status**
Active

Scope of work

Frequency
2 Monthly **Start date**
3 10/15/2026 **End date**
mm/dd/yyyy

Next visit
mm/dd/yyyy **Preferred start time**
09:00 AM **Visit length (minutes)**
120

Blank = the start date.

Job type
— **Usual technician**
Assign each visit by hand **Team**
—

Annual value
0 **Renewal term (months)**
12 **Renewal notice (days)**
45

Assets covered

Hold Ctrl or Cmd to pick several.

Create contract Cancel

Contract form

13.2 How visits are created

- Every night at 02:00 (company time) the system creates a work order for each active contract whose next visit is within the **days ahead** set in Settings. The job copies the checklist, client, site, assets and usual technician and moves the contract's next visit date forward. The same visit is never created twice.
- To create visits now, press **Generate due visits** on the list or on one contract.
- The contract page shows **Visits** done, **Coming up** and the **Assets covered**.

A contract

The nightly creation needs the server's scheduled task (cron) to be set up. If visits are not appearing, ask whoever installed the system to check the cron job.

13.3 Renewals

When the end date is near (within the renewal notice days) the contract is flagged *renewal due* on reports and alerts. Press **Renew** to extend it by the renewal term. A contract past its end date is marked expired and stops creating visits.

14.1 How a job is costed

Part of the job	How it is worked out
Labour cost	Approved timesheet hours × the technician's hourly cost. Hours beyond the daily limit use the overtime multiplier.
Parts	Quantity used × part cost. Selling price adds the markup.
Other costs	Subcontractors, travel, permits and anything added under Time & cost, Add cost . Tick <i>Bill to client</i> to charge it (a markup applies).
Revenue	Fixed price when the job has an approved quote; otherwise time and materials (billable hours × labour rate + parts + billable costs). Approved change authorizations are always added.
Margin	Revenue minus total cost.

14.2 Billing hand-over

- 1 Open **Billing. Ready to bill** (1) lists jobs that are signed off. **Finished but not ready yet** shows what is still missing (review, sign-off, timesheets).
- 2 Press **Preview** to see the invoice lines for one job.
- 3 Press the **CSV** or **JSON** export button. All ready jobs are exported as one batch, marked **Invoiced** and listed under **Recent exports** (2), where you can download the batch again.
- 4 Import the file into your accounting system. Or let your accounting system pull the batch by itself (next section).

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Billing

Completed, signed-off work ready to hand over to AxisFinancial

Search...

1

Ready to bill (3)

Total PKR 27,090.64

☒	JOB	CLIENT	PRICING	SUBTOTAL	TAX	TOTAL	MARGIN	
☒	Main DB torque check and thermal scan JOB-00003	Zenith Textile Mills	time and materials	6,280.00	1,004.80	7,284.80	3,830.00	Preview
☒	RTU 1 not cooling: capacitor replaced JOB-00004	Capital Retail Group	time and materials	8,776.00	1,404.16	10,180.16	4,134.33	Preview
☒	Booster pump seal leak JOB-00005	Al-Noor Residency	time and materials	8,298.00	1,327.68	9,625.68	3,673.83	Preview

2

Export CSV

Export JSON

Exporting marks the jobs as invoiced. AxisFinancial can also pull them at <http://127.0.0.1:8020/api/v1/billing/invoices>.

Finished but not ready yet (4)

JOB-00006 · Server room UPS bypass test
NexGen Offices

Awaiting sign-off

JOB-00007 · Fire pump weekly run test
Skypark Tower Management

Awaiting review

JOB-00008 · Chiller 1 monthly check
Margalla Specialist Hospital

Awaiting review

JOB-00009 · Store signage power point relocation
Capital Retail Group

Awaiting review

Recent exports

EXP-20261009-001

2 jobs · PKR 0.00 · 15 Oct, 01:09 PM · Maryam Khan

Download CSV

Billing

14.3 Connecting your accounts (API)

For AxisFinancial or another accounting system. Authenticate with the **Bearer token** shown in Settings (*AxisFinancial API token*).

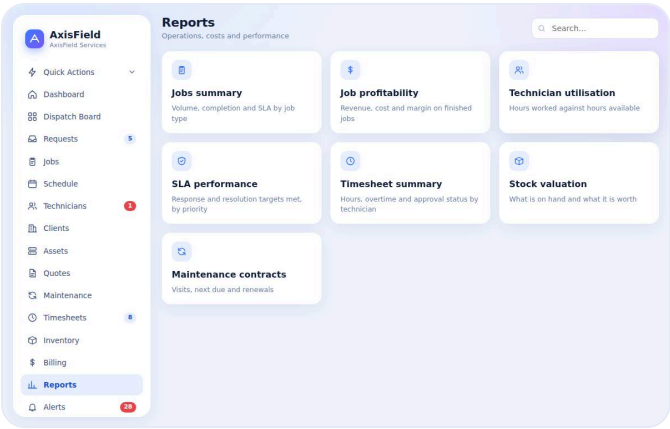
Call	Purpose
GET /api/v1/billing/invoices	Returns jobs ready to invoice (JSON).
POST /api/v1/billing/acknowledge	Confirms the jobs were received, marking them invoiced.

Use **Generate new token** in Settings if a token is lost. The old one stops working at once.

14.4 Reports

Open **Reports** for these views. Every report can be filtered by date and downloaded as CSV:

Report	Shows
Jobs summary	Volume, completion and SLA by job type
Job profitability	Revenue, cost and margin on finished jobs
Technician utilisation	Hours worked against hours available
SLA performance	Response and resolution targets met
Timesheet summary	Hours, overtime and approval status
Stock valuation	What is on hand and what it is worth
Maintenance contracts	Visits, next due, renewals



Reports

A screenshot of the AxisField Job profitability report. The interface includes a sidebar with navigation links similar to the Reports dashboard, with 'Reports' highlighted. The main content area is titled 'Job profitability' and shows a table of revenue, cost, and margin on finished jobs. The table has columns for JOB, CLIENT, PRICING, REVENUE, LABOUR, PARTS & OTHER, TOTAL COST, MARGIN, and H. It includes filters for dates (10/01/2026 to 10/31/2026) and time periods (This month, Last month, This year). The table lists various jobs with their details and a total row at the bottom.

JOB	CLIENT	PRICING	REVENUE	LABOUR	PARTS & OTHER	TOTAL COST	MARGIN	H
JOB-00001	Skypark Tower Management	time and materials	7,650.00	1,170.00	2,600.00	3,770.00	3,880.00	
JOB-00002	Margalla Specialist Hospital	time and materials	43,742.00	2,058.33	28,200.00	30,258.33	13,483.67	
JOB-00003	Zenith Textile Mills	time and materials	6,280.00	1,400.00	1,050.00	2,450.00	3,830.00	
JOB-00004	Capital Retail Group	time and materials	8,776.00	1,041.67	3,600.00	4,641.67	4,134.33	
JOB-00005	Al-Noor Residency	time and materials	8,298.00	824.17	3,800.00	4,624.17	3,673.83	
JOB-00006	NexGen Offices	time and materials	2,691.00	933.33	0.00	933.33	1,757.67	
JOB-00007	Skypark Tower Management	time and materials	2,812.50	945.00	0.00	945.00	1,867.50	
JOB-00008	Margalla Specialist Hospital	time and materials	6,124.00	1,208.33	1,300.00	2,508.33	3,615.67	
JOB-00009	Capital Retail Group	time and materials	7,156.00	793.33	3,360.00	4,153.33	3,002.67	
Total			93,529.50			54,284.16	39,245.34	

Job profitability

14.5 Alerts

Alerts collects what needs attention: late check-ins, SLA breaches, requests not answered, jobs waiting for review, timesheets to approve, low stock and renewals. The red number in the menu is the total.

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Alerts

28 items need a look

Search...

1

Urgent

4

Late check-in

JOB-00014 VRF outdoor unit inspection · Hira Siddiqui was due at 11:00 AM

2 hours ago

Late check-in

JOB-00015 Basement fire pump and alarm audit · Imran Qureshi was due at 12:19 PM

56 minutes ago

Late check-in

JOB-00018 Client follow-up visit: server room airflow · Sana Malik was due at 01:00 PM

15 minutes ago

SLA breached

JOB-00024 Ward 3 AC not cooling was due 15 Oct, 12:34 PM

41 minutes ago

6

Needs action

Unassigned job

JOB-00024 Ward 3 AC not cooling · Margalla Specialist Hospital · due 15 Oct, 12:34 PM

6 minutes ago

Unassigned job

JOB-00025 Flickering lights in the display area · Capital Retail Group · due 15 Oct, 04:09 PM

6 minutes ago

Unassigned job

JOB-00028 Generator will not auto-start · Al-Noor Residency · due 15 Oct, 09:09 PM

6 minutes ago

Unassigned job

JOB-00027 Install 4 additional wall sockets · NexGen Offices · due 17 Oct, 01:09 PM

6 minutes ago

Unassigned job

JOB-00031 Replace OT UPS battery bank · Margalla Specialist Hospital · due 17 Oct, 01:09 PM

6 minutes ago

Alerts

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15 The client portal

Client

Office staff (to help clients)

The client portal lets your clients see their own work without phoning you. Clients only ever see their own data.

15.1 Get an account

There are two ways:

- 1 Register yourself.** Open </register> (or press *Create account* on the company page). Type your name, phone, **email**, short address and a password, then **Create account**. You are signed in at once.
- 2 After sending a request.** The "thank you" page offers **Track this request with a free account**. Set a password and you are in; the request you just sent is linked to your account.
- 3 Created by the office.** Your service company can create the login for you and give you a temporary password.

Create your client account

Free, takes a minute

Why create an account?

- Track the status of every request, from received to scheduled to done
- See your past services, job reports and photos in one place
- Approve quotes and sign off completed work online
- Send new requests faster, with your details already filled in

1

Your name *

2

Email *

3

Phone *

4

Site address

3

Password *

4

Repeat password *

Create account

Already registered? [Sign in](#)

Client registration



AxisField Services

+92 51 111 000 123 service@example.com



Thank you, we have your request

Your reference is **SR-00007**. We will respond by 15 Oct, 09:12 PM.

[Send another request](#)

1

Track this request with a free account

Create your own client portal with the details you just gave us. Set a password and you are in.

Why create an account?

- Track the status of every request, from received to scheduled to done
- See your past services, job reports and photos in one place
- Approve quotes and sign off completed work online
- Send new requests faster, with your details already filled in

Account for **Sara Khan** · sara.khan@example.com

Password *

Repeat password *

[Create my account](#)

No thanks, I only wanted to send a request. [Sign in](#) if you already have an account.

After sending a request: create your account

If your email is already registered as a client of the company, self-registration is declined for your security. Ask the company to set up your login.

15.2 The portal home

The home page shows **Request service** (1), jobs **waiting for your sign-off** (2), your **upcoming appointments** (3), open requests and recently completed jobs. The top menu has Home, Requests, Appointments, Quotes, Reports and Sites & assets.

The screenshot shows the AxisField Services Client portal home page. At the top, there's a navigation bar with the company logo 'AxisField Services' and 'Client portal'. The user is logged in as 'Ayesha Rahim'. The main content area is divided into several sections: a 'Welcome, Ayesha' message, a 'Request service' button (1), a 'Work waiting for your sign-off' section (2) with a 'Sign off' button, an 'Upcoming appointments' section (3) with 'In progress' and 'Scheduled' status indicators, a 'Your open requests' section with a 'Triaged' status indicator, and a 'Recently completed' section with 'Report' buttons.

Client portal home

15.3 Send a request

- 1 Press **Request service**. Type what is wrong (1) and details. Choose the **site** (2) and equipment, the type of work and how urgent it is (3). Add a photo if it helps.

- 2 On a **phone**, a box asks to **share your current location**. Tap **Use my location**, allow it, and check the short address it fills in.
- 3 Press **Send request** (4). You get a reference number such as SR-00012 and can follow it under **Requests**.

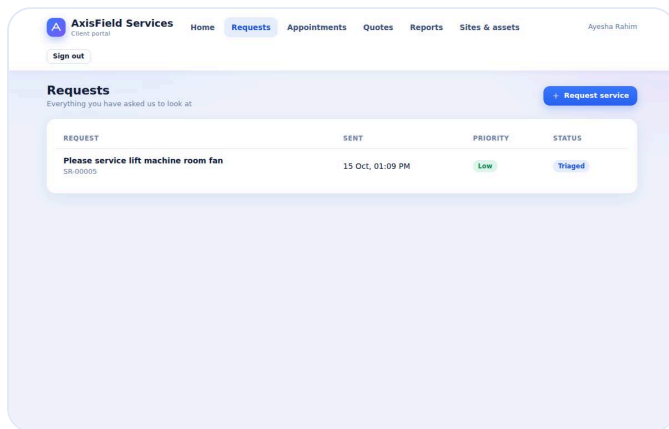
Request service (computer)

Request service (phone)

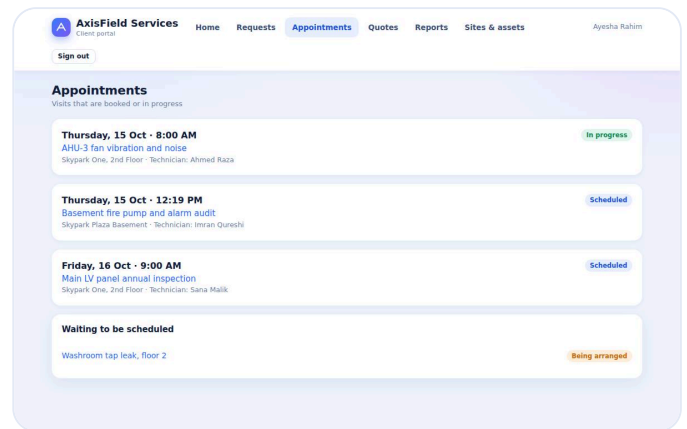
15.4 Follow your work

- **Requests:** status from *New* to *Triaged* to *Converted* (a job was created) with the planned technician and time.
- **Appointments:** upcoming visits with date, time and technician name.
- **Reports:** completion reports of finished jobs with photos and signature, to print or save as PDF.

- **Sites & assets:** your sites and equipment.



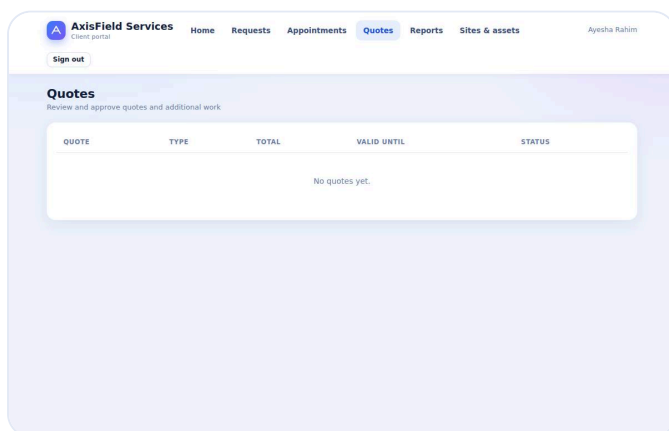
Requests



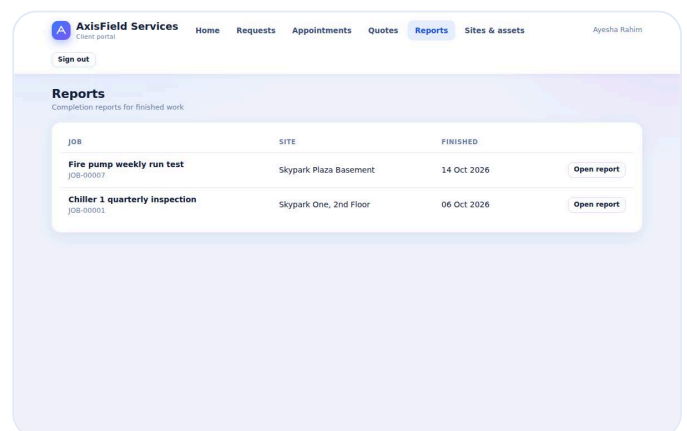
Appointments

15.5 Approve quotes and sign off work

- 1 Open **Quotes**, read the quote and press **Approve** or **Decline**. Approving needs your name and ticking the agreement. Extra work asked for by the technician arrives here as a quote too.
- 2 When a job is finished a **Sign off** button appears on your home page. Open it, check the work, type your name, give stars and press **Sign off**.



Quotes



Reports

16

Troubleshooting and FAQ

Everyone

Question or problem	Answer
I cannot sign in.	Check the email and password. After six wrong tries wait a minute. If you are a technician who applied, the office must approve you first. Ask an administrator to reset your password or check that <i>Can sign in</i> is ticked.
A job does not appear on the technician's phone.	The job must be assigned to that technician (or have them in the crew). Ask them to open Today while online to refresh.
The technician cannot press "Complete job".	Required checklist steps are not ticked, or they are not the lead technician.
Times look five hours wrong.	Check the company time zone in Settings.
Dispatch says a technician "does not have the skill".	Add the skill to the technician, change the job type's required skill, or assign anyway.
Maintenance visits are not created.	Check the contract is <i>Active</i> , the next visit date, the days-ahead setting, and that the server cron is running. Press Generate due visits to create them now.
The client did not receive the quote.	The system gives you the link; you send it. Press Mark as sent and copy the link from the message.
The location button does not appear on the request form.	It is shown only on phones, and the site must use HTTPS. If the phone blocks location for the browser, allow it in the browser's site settings or just type the address.
Can the system track technicians by GPS?	No. The only location captured is the one a customer chooses to share once with a request.
Can a client see another client's jobs?	No. Clients only see records linked to their own client account.

How do I get my data out?	Reports have CSV download; Billing exports CSV or JSON; job reports print or save as PDF.
---------------------------	---

17 Appendix

Reference

17.1 Public addresses at a glance

Address	Purpose	Sign-in needed
/login	Sign in (all roles)	No
/request	Send a service request	No
/register	Client registration	No
/technician/join	Technician application	No
/q/<token>	Client quote page (sent by you)	No, link only
/signoff/<job>?signature=...	Client sign-off link	No, signed link, valid 7 days
/tech	Technician app	Technician
/portal	Client portal	Client
/manual	This manual	No

17.2 Email intake

Point your email provider's inbound webhook (Mailgun, Postmark, SendGrid or your own script) to `POST /api/intake/email` with the header `X-Intake-Token: <your token>` and fields such as `from`, `subject` and `text`. A service request is created and matched to a client by email address.

17.3 Words used in AxisField

Term	Meaning
------	---------

SLA	Service level agreement: the promised response and resolution times for a priority.
Work order / Job	One piece of work with a technician, checklist, parts, time and cost.
Change authorization	A quote for extra work found on site that the client must approve.
Lead / Crew	The main technician on a job, and extra technicians helping.
Par level	The quantity you want to keep in a van or warehouse.
PM	Planned maintenance: visits created by a maintenance contract.
Fixed price / T&M	Billing from an approved quote / from actual time and materials.

17.4 Demo accounts

A demo installation is loaded with sample data. The password for all is `password` : `admin@axisfield.test` , `dispatcher@axisfield.test` , `supervisor@axisfield.test` , `tech@axisfield.test` (technician app), `client@axisfield.test` (portal). Remove demo data before real use.

17.5 Good habits

- Triage new requests within the SLA time shown on each request.
- Always give technicians clear instructions and the right job type so the checklist is correct.
- Review and sign off jobs the same day, so billing is never waiting.
- Keep vans stocked and check Replenishment weekly.
- Approve timesheets daily so overtime and costs stay accurate.