

Solution Overview

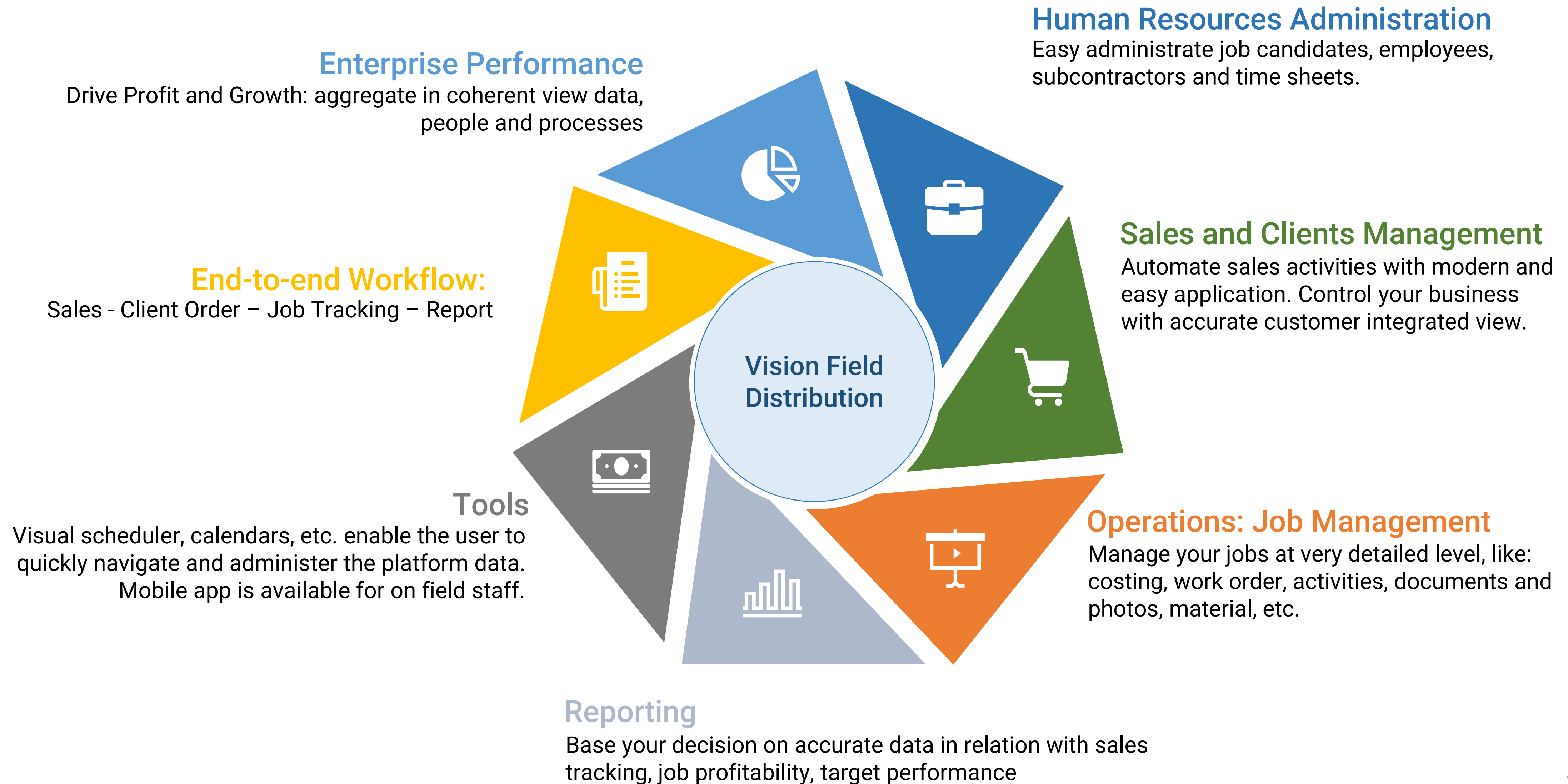
Vision Field Services

#Employee Management
#Sales Automation
#Job Tracking
#Administration

vision
technology

Vision Field Services

Integrated platform for Field Services Companies - *Modules*



Vision Field Services

Integrated platform for Field Services Company - *Purpose*

Manage and Elevate Your Clients' Experience

Client Management
Estimating
Scheduling
Project Management
Job Tracking
Change Orders
Mobile Project Manager App
Sub-Contractor Management
Invoicing

Retain and Manage Your Employees

Candidate Tracking
Interview Tracking
Employee Tracking
Growth & Training
Conducting Reviews
Paid Time Off (Mobile)

Drive Profit and Growth

Sales Tracking
Job Profitability Tracking
Job Profitability Dashboard
Target Performance
Referral Tracking

Vision Field Services

Integrated platform for Field Services Company - Roles

End-to-end Workflow: Sales - Client Order – Job Tracking – Report.

Retain and Manage Your Employees: Candidate and Interview Tracking, Employee Administration, Growth & Training, Conducting Reviews, Paid Time Off (Mobile)

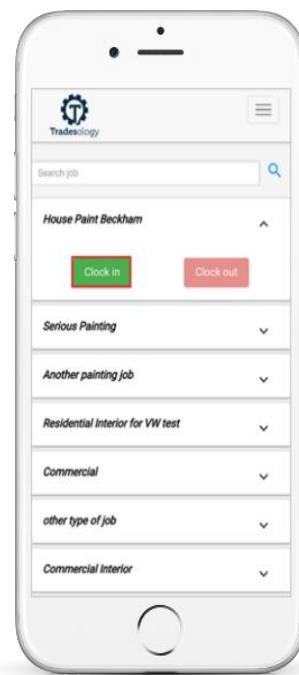
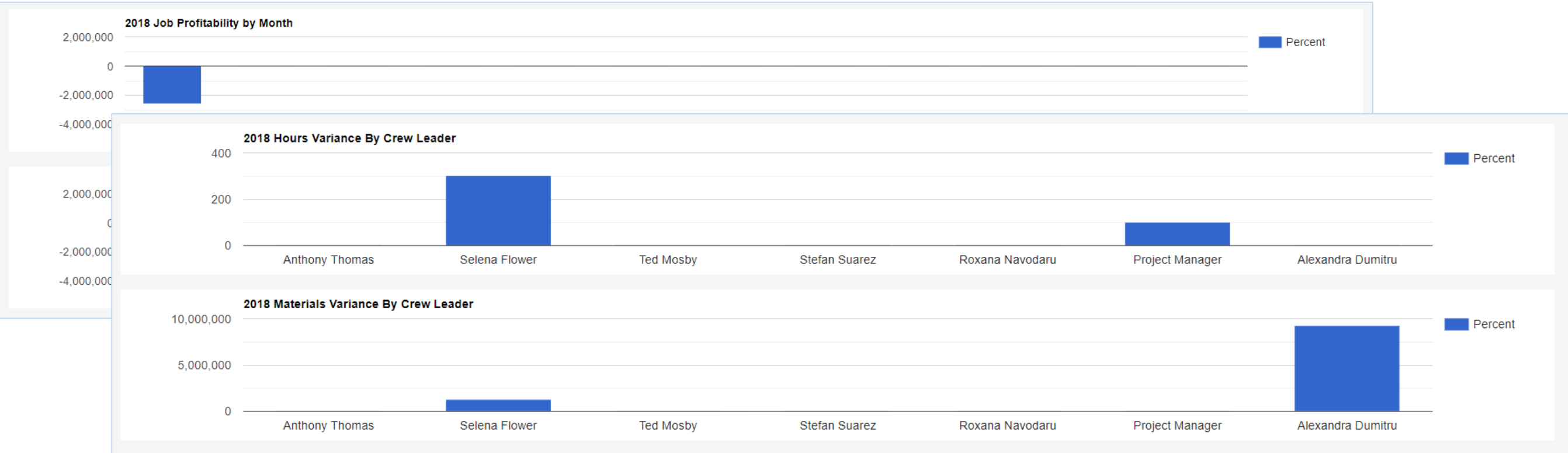
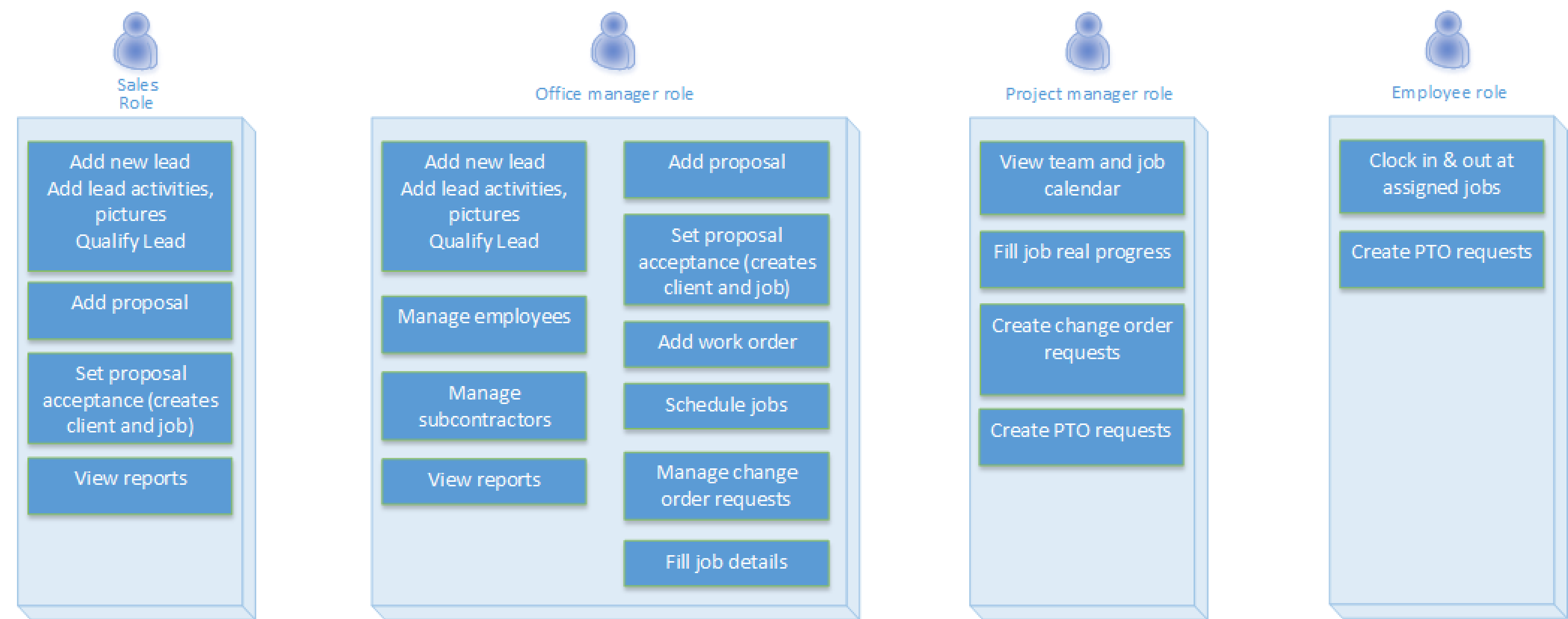
Sales and Customers: Keep your leads, clients, and contact information organized and accessible from anywhere at any time. Workflows have already been created so a lead can seamlessly become a client and then a project can be scheduled.

Operations – Job tracking: The Jobs module allows you to effectively to manage everything on a project from Job Costing, Work Orders, assigning Activities, managing Docs/Photos, and tracking Materials, Employee Hours, Sub-contractors, Parking, Equipment Rentals, Paint Colors. Invoicing and understanding your profit becomes a breeze with your master Job Summary built in.

Back Office staff efficiency: real time data access, approval workflows.

Real time reports and dashboards: based your decision on real-time data analysis.

Integration: out of the box integration with PEP for painting, Quick Books for accounting, etc.



Sales and Client Management

VISION
Field Services

PeopleSalesJobsAdministrationReportsScheduleUpdate Token QB

Administrator

People | Leads | Lead Page

New LeadQualifiedFuture Prospect

VISION
Field Services

PeopleSalesJobsAdministrationReportsScheduleUpdate Token QB

Administrator

Sales | Clients | Client Page

Summary

First Name *Visionware

Last Name *Test

CompanyVW Test 6

Phone *9875641230

Cell

Email *testv@visionware.ro

StateAlabama

City/TownAdger

Address

Client Type

Zip

Save

Client DetailsJobsActivitiesDocs&Photos

Job

other type of jobGo to job page
StatusPROPOSED
Job TypeCommercial Luxury Buildings
Start Date3/14/2018
End Date3/22/2018

Commercial

TEST DAN VW
RejectAccept

Job Alex
RejectAccept

Proposals

Name	Create Date	Submit Date	Grand Total
proposal test dan 16.11 7:09	11/16/2017 12:09 PM	11/16/2017 7:09 PM	\$6
something text for proposal TEST	11/16/2017 12:35 PM	11/16/2017 7:34 PM	\$6
	11/17/2017 9:35 AM	11/17/2017 4:35 PM	\$6
Rejection Notes			
NameCreate DateSubmit DateGrand Total			
proposal test dan	11/16/2017 11:42 AM	11/16/2017 6:42 PM	\$1.3
Rejection Notes			
NameCreate DateSubmit DateGrand Total			
some text	11/28/2017 10:42 AM	11/28/2017 5:42 PM	\$0
	11/28/2017 10:58 AM	11/28/2017 5:57 PM	\$0
Rejection Notes			
NameCreate DateSubmit DateGrand Total			
	11/29/2017 10:27 AM	11/29/2017 5:26 PM	\$232
Rejection Notes			

Tradesology

Search job

House Paint Beckham

Clock inClock out

Serious Painting

Another painting job

Residential Interior for VW test

Commercial

other type of job

Commercial interior

You'll be able to make business decisions based on the right knowledge to ignite your revenue and improve your profit.

Leads

Key Features

Simple lead qualification workflow: input relevant information and qualify lead and transform it into Client or keep it as future prospect

- Lead
 - Capture lead details like general information and contact details
- Project Information
 - Add project summary information.
- Activities
 - Manage the activities for respective lead: Call, Email, Request Photos, Site Visits etc.
- Docs and Photos
 - Upload relevant documents or photos.
- Jobs Proposal
 - Create job proposals.

VISION
Field Services

PeopleSalesJobsAdministrationReportsScheduleUpdate Token QB

Administrator

People | Leads | Lead Page

New LeadQualifiedFuture Prospect

Contact details

First Name *Sookie

Last Name *Stackhouse

CompanyTrueB

Phone *8465498

Cell

Emailsookie@trueb.com

State *Wisconsin

City/Town *Bay City

Address

Sales Person

Project Type *

Referral Source *

Save

Project informationActivitiesDocs&PhotosJobs

Activity type	Description	Due date	Responsible	Complete	
Call	TEST ACTIVITY	1/9/2018		<input type="checkbox"/>	<div></div> <div></div>
Email	desc	2/1/2018	Adrian Chelariu	<input checked="" type="checkbox"/>	<div></div> <div></div>

Client

Key Features

Client

Capture client summary like general information and contact details

Client Details

Add project summary information.

Jobs

Stay update with all client jobs with Jobs Summary.
Quick and relevant information regarding the activity for the respective client

Activities

Manage administrative activities for client

Documents and Photos

Upload relevant documents or photos.

vision
Field Services

PeopleSalesJobsAdministrationReportsScheduleUpdate Token QB

Administrator

Sales | Clients | Client Page

Summary

First Name *

Visionware

Last Name *

Test

Company

Phone *

9875641230

Cell

Email *

testvisionware@visionware.ro

State

Alabama

City/Town

Adger

Address

Client Type

Zip

Save

Client DetailsJobsActivitiesDocs&Photos

Job

Proposals

Get proposals

Residential Interior for
VW test

Go to job page ➡

StatusPROPOSED

Job TypeCommercial Luxury Buildings

Start Date

End Date

job name

Go to job page ➡

Status

Job TypeExterior

Start Date1/30/2018

End Date1/31/2018

Job Test

Go to job page ➡

Status

Job TypeWallcovering

Start Date

End Date

Job test

Go to job page ➡

Status

Job TypeWallcovering

Start Date

End Date

Name

Create Date

Submit Date

Grand Total

Details

Proposal test fro residential...

11/16/2017 11:43 AM

11/16/2017 6:43 PM

\$770

Current

Rejection Notes

Name

Create Date

Submit Date

Grand Total

Details

Rejection Notes

Name

Create Date

Submit Date

Grand Total

Details

Rejection Notes

Name

Create Date

Submit Date

Grand Total

Details

Rejection Notes

Client DetailsJobsActivitiesDocs&Photos

Activity type	Description	Due date	Responsible	Complete	
Call	Eget mi proin sed libero enim sed faucibus. Cras pulvinar mattis nunc sed blandit. Scelerisque fermentum dui faucibus in ornare quam.	10/30/2019	Roxana Navodaru	<input type="checkbox"/>	<div><div></div><div></div></div>
Email	haretra vel turpis nunc eget lorem. Adipiscing elit dui tristique sollicitudin nibh sit. Felis bibendum ut tristique et egestas quis. Nisl purus in mollis nunc sed id semper risus.	11/8/2019	Roxana Navodaru	<input type="checkbox"/>	<div><div></div><div></div></div>

Sales Tracking
Dashboard

Analyze Sales activity and keep records and detailing all aspects of your sales process.

Sales Tracking

Select sales person:

Select year:

Select month:

Export

Job Number	Job	Lead	Source	Region	Type	Lead Date	Bid Date	Bid Price		Sold Date	Sales Price		Days to Sell	Search
								From	To		From	To		
153	Office space reshaping									10/28/2019				
152	VW Test 423									4/23/2018				
151	Job QB 423									4/23/2018				
150	Residential InteriorTestVW						4/20/2018		\$3231	4/20/2018		\$3231	0	
149	Visionware142	Visionware14223	Visionware142	Angie's List	KS Abilene	Wallcovering	04/20/2018	4/20/2018	\$32	4/20/2018		\$32	0	
148	Residential Interior						4/20/2018		\$6006.18	4/20/2018		\$6006.18	0	
147	Commercial 419	Lead Test VW 419	BNI	AR Alix	Exterior	04/19/2018	4/19/2018		\$5415.48	4/19/2018		\$5415.48	0	
146	Residential Interior 419	Lead Test VW 419	BNI	AR Alix	Exterior	04/19/2018	4/19/2018		\$1270.34	4/19/2018		\$1270.34	0	
145	Residential Interior to lead 417	Lead VW417	BNI	AK Akiak	Exterior	04/17/2018	4/19/2018		\$3782.26					
144	Residential Interior Lead417	Lead VW417	BNI	AK Akiak	Exterior	04/17/2018	4/19/2018		\$5220.72					
143	Residential Interior	test visionware company		AK Akiak	Wallcovering	10/10/2017	11/6/2017		\$171.2	4/19/2018		\$171.2	164	
142	Job test									4/18/2018				
140	Job Test 417									4/17/2018				
131	Residential Interior delete						4/17/2018		\$288.07					
130	Residential Interior delete						4/17/2018		\$2649.35	4/17/2018		\$2649.35	0	
Totals						#Leads: 64	#Bids: 41	Value Bid: \$84373.1		#Sales: 46	Value Sold: \$84373.1		Average Days to Sell: 12	
						<	1 / 5	>		Choose page				✓

Target Performance Dashboard

On Target Performance Dashboard

2019

Save All

Month	Target Revenue	Actual Revenue	Target Direct Hours	Actual Direct Hours	Gross Profit	Gross Profit %
January	1000	1200	400	0	333	28
February				0		
March				0		
April	25	312	32	0	123	0.39
May				0		
June				0		
July				0		
August				0		
September				0		
October				0		
November				0		
December				0		
Total or Average	1025	1512	432	0	456	30

Measures current sales revenue and compares that to a target or past performance



Operations

Jobs > Job Page

Started

Finished

Job Details

Job Name *

Office space reshaping

Project Type *

Commercial Luxury Buildings

Client *

Daniel Matea

Start Date *

10/28/2019

End Date

12/6/2019

Sales Person

Roxana Navodaru

Project Manager

Project Manager

State

Alabama

City

Andalusia

Supervisor

Roxana Navodaru

Address

25 Plymouth Road

Notes

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.

Job Schedule Color

Time & Material Job

Finish jobSave

Job CostingWork orderTrackingActivitiesDocs&PhotosMaterialsSubcontractorsParkingEquipment/RentalColorsJob Summary

Materials Estimated

22890

Actual Materials Cost

\$12176

Materials Variance

\$-10714

Estimated Hours

Actual Internal Hours Worked

Additional Work Order hours

Hours Variance

Job CostingWork orderTrackingActivitiesDocs&PhotosMaterialsSubcontractorsParkingEquipment/RentalColorsJob Summary

Employee

<

Monday

Tuesday

Wednesday

Thursday

Friday

Saturday

>

Regular Hours

OT Hours

Rate

Total Pay

10/28/2019

10/29/2019

10/30/2019

10/31/2019

11/1/2019

11/2/2019

from the beginning

from the beginning

from the beginning

Alex Beclu

8:00

8:00

0:00

0:00

8:00

0:00

24:00

0:00

\$10

\$240

Cristi Test

6:00

6:00

0:00

0:00

0:00

0:00

12:00

0:00

\$15

\$180

Total

14:00

14:00

0:00

0:00

8:00

0:00

36:00

0:00

\$420

Actual work: 36:0 h

Estimated Work: 400 h

Estimated Progress: 9 %

☒ All☐ Week

Actual Internal Work: %

Actual External Work: %

Optimize and control the purchasing process in direct and real time correlation with sales demand. Improve delivery by full traceability of the products, from provider to customer.

vision
technology

Job Tracking

Key Features

Job Details

Keep track of your jobs main details: name, timeframe, project type, Client, Sales Responsible, Project Manager, State, Address, Supervisor, Notes. Pick a color for this job to further identify it. Beside the general details, The Job Tracking page keeps in one place all job relevant information: Costing, Work Order, Tracking, activities, Docs and Photos, Materials, Subcontractors, Parking, Equipment, Colors and Summary

Each information can be added manually or automatically imported from specific modules to this page, along job lifecycle.

Jobs > Job Page

Started

Finished

Job Details

Job Name *

Office space reshaping

Project Type *

Commercial Luxury Buildings

Client *

Daniel Matea

Start Date *

10/28/2019

End Date

12/6/2019

Sales Person

Roxana Navodaru

Project Manager

Project Manager

State

Alabama

City

Andalusia

Supervisor

Roxana Navodaru

Address

25 Plymouth Road

Notes

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.

Job Schedule Color

Time & Material Job

Finish jobSave

Job Costing

Work order

Tracking

Activities

Docs&Photos

Materials

Subcontractors

Parking

Equipment/Rental

Colors

Job Summary

Materials Estimated

22890

Actual Materials Cost

\$12176

Materials Variance

\$-10714

Estimated Hours

400

Actual Internal Hours Worked

36

Additional Work Order hours

0

Hours Variance

-277

Actual Other Job Costs

250

Actual Labor Cost Without burden

\$22170

Labor Burden

\$84

Actual External Hours Worked

87

Total Invoiced

24000

Actual Gross Job Profit

\$11070

Actual Gross Profit (%)

46

Vision Field Services\ Operations\ Job Tracking

vision
technology

Job Tracking

Key Features

Costing

Aggregates in one place all costing elements, estimated vs actuals: materials, hours, other costs, external hours, etc. As the job progresses, the user will complete the Project financial information, as follow:

- Materials estimated
- Actual materials cost
- Materials variance
- Materials variance (%)
- Estimated hours
- Actual Internal hours worked
- Additional work order hours
- Hours variance
- Actual other job costs
- Actual labor cost without burden
- Labor burden
- Actual External Hours worked
- Total invoiced
- Actual gross job profit
- Actual Gross Profit (%)

A part of this information will be automatically brought into the application from 3rd party specialized platforms (ex. PEP) for the regular jobs.

Work Order

Define the projects details (like working areas or deliverable packages) and administrate all resources at granular level.

Tracking

List with all the team workers that work at this job. For any one of them, Project Manager will see the number of hours worked for this job, organized in regular hours and overtime hours.

Job Costing

Work order

Tracking

Activities

Docs&Photos

Materials

Subcontractors

Parking

Equipment/Rental

Colors

Job Summary

Materials Estimated

22890

Actual Materials Cost

\$12176

Materials Variance

\$-10714

Estimated Hours

400

Actual Internal Hours Worked

36

Additional Work Order hours

0

Hours Variance

-277

Actual Other Job Costs

250

Actual Labor Cost Without burden

\$22170

Labor Burden

\$84

Actual External Hours Worked

87

Total Invoiced

24000

Actual Gross Job Profit

\$11070

Actual Gross Profit (%)

46

Job Costing

Work order

Tracking

Activities

Docs&Photos

Materials

Subcontractors

Parking

Equipment/Rental

Colors

Job Summary

QuickBooks

Export PDF

Add area

Area Name

Entrance

Add item

Item Name

Notes

Quantity

Hours

item 1

notes goes here

3

2

item 2

notes goes here

10

4

Area Name

CEO's Office

Add item

Item Name

Notes

Quantity

Hours

Area Name

Operational Space

Add item

Item Name

Notes

Quantity

Hours

Save Changes

Job Costing		Work order		Tracking		Activities		Docs&Photos		Materials		Subcontractors		Parking		Equipment/Rental		Colors		Job Summary	
Employee		<	Monday 10/28/2019	Tuesday 10/29/2019	Wednesday 10/30/2019	Thursday 10/31/2019	Friday 11/1/2019	Saturday 11/2/2019	>	Regular Hours from the beginning	OT Hours from the beginning	Rate	Total Pay from the beginning								
Alex Beciu			8:0	8:0	0:0	0:0	8:0	0:0		24 : 00	0 : 00	\$10	\$240								
Cristi Test			6:0	6:0	0:0	0:0	0:0	0:0		12 : 00	0 : 00	\$15	\$180								
Total			14 : 00	14 : 00	0 : 00	0 : 00	8 : 00	0 : 00		36 : 00	0 : 00		\$420								
Actual work: 36 : 0 h		Estimated Work: 400 h		Estimated Progress: 9 %		<input checked="" type="checkbox"/> All <input type="checkbox"/> Week		Actual Internal Work: <input type="text"/> %		Actual External Work: <input type="text"/> %											

Job Tracking

Key Features

Activities

Contain different tasks. The user can add any task in list. The tasks will have a checkbox to be checked when the task is completed. Every task will have the following information:

- Activity type
- Description
- Due date
- Responsible

Docs and Photos

Contain documents and photos about the lead. The user could add any document or file to the list.

Materials

a list with all the materials used for the job. The user could add a new material by accessing the Add material button. He will have to introduce the following details about the materials:

- Quantity
- Description
- Unit price
- File – the user will upload a picture or a file with the receipt for the acquisition

Subcontractors

Track effort per person and per day. The effort is automatically updated based on the check in time input by the field staff using mobile apps

Job Costing	Work order	Tracking	Activities	Docs&Photos	Materials	Subcontractors	Parking	Equipment/Rental	Colors	Job Summary
+										
Activity Type	Description				Due Date	Responsible			Complete	
Call	discuss regarding timeframe and building access				10/30/2019	Roxana Navodaru			<input type="checkbox"/>	
Email	Office blueprint				10/29/2019	Roxana Navodaru			<input type="checkbox"/>	

Job Costing	Work order	Tracking	Activities	Docs&Photos	Materials	Subcontractors	Parking	Equipment/Rental	Colors	Job Summary
+										
Name	Description				Uploaded Date	Uploaded By				
project management.png	job plan				10/28/2019	admin				
desktop.png	furniture				10/28/2019	admin				

Job Costing	Work order	Tracking	Activities	Docs&Photos	Materials	Subcontractors	Parking	Equipment/Rental	Colors	Job Summary
+										
Quantity	Description				Unit Price	Total				
24	Multi-storey timber frame buildings a design guide				\$400	\$9600				
56	Curvable fiber gypsum boards				\$46	\$2576				
2	Decorative Calcium Sillicate Boards for Soffits				\$654	\$1308				

Job Costing	Work order	Tracking	Activities	Docs&Photos	Materials	Subcontractors	Parking	Equipment/Rental	Colors	Job Summary
+										
Subcontractor Name	Rate				Hours worked	Total pay				
Painting Art Subco	\$250				87	\$21750				
Sucontractor VW 419	\$34				10	\$340				

Job Tracking

Key Features

Parking

All the parking costs for the job. The user can add a new parking cost by accessing the Add Parking Cost button

Equipment/Rental

Contain a list with all the equipment that was rented for this job.

Job Summary

List of questions with a free text answer. Question number 4 refers to a punch list. In this case, if the job has a punch list, the user will add lines to it using the button “+”. The summary of the job could be exported in a PDF using the “Export PDF” button.

Job Costing

Work order

Tracking

Activities

Docs&Photos

Materials

Subcontractors

Parking

Equipment/Rental

Colors

Job Summary

Quantity	Description	Unit Price	Total	
10	Business Area parking tickets	\$8	\$80	<div><div></div><div></div></div>

Job Costing

Work order

Tracking

Activities

Docs&Photos

Materials

Subcontractors

Parking

Equipment/Rental

Colors

Job Summary

Quantity	Description	Unit Price	Total	
1	Stainless steel Paint making machine	\$100	\$100	<div><div></div><div></div></div>
2	Liquid detergent making machine	\$100	\$200	<div><div></div><div></div></div>
5	Paint dispenser / colorant tinting machine / color making	\$25	\$125	<div><div></div><div></div></div>

Job Costing	Work order	Tracking	Activities	Docs&Photos	Materials	Subcontractors	Parking	Equipment/Rental	Colors	Job Summary					
<div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div></div> <div></div>															
<div><div><div>1. Did you do a walk through the job with the customer?</div><div>Vehicula ipsum a arcu cursus vitae congue mauris. Fermentum et sollicitudin ac orci phasellus.</div></div><div><div>2. Is there a punch list?</div><div><table><tr><th>Area</th><th>Description</th><th></th></tr><tr><td>Livingroom</td><td>just few words to be added here</td><td><div><div></div><div></div></div></td></tr></table></div></div><div><div>3. Has the punch list been scheduled with homeowner?</div><div>Elementum curabitur vitae nunc sed velit dignissim sodales ut. Lacus suspendisse faucibus interdum posuere lorem ipsum dolor sit amet. Pellentesque elit eget gravida cum. Tempus imperdiet nulla malesuada pellentesque elit. Eu turpis egestas pretium aenean pharetra.</div></div><div><div>4. If no punch list were they happy with the outcome?</div><div>Pharetra vel turpis nunc eget lorem. Adipiscing elit duis tristique sollicitudin nibh sit. Felis bibendum ut tristique et egestas quis. Nisi purus in mollis nunc sed id semper risus. Sed cras ornare arcu dui vivamus arcu felis bibendum ut.</div></div></div> <div><div>Export PDF</div><div>Save Summary</div></div>										Area	Description		Livingroom	just few words to be added here	<div><div></div><div></div></div>
Area	Description														
Livingroom	just few words to be added here	<div><div></div><div></div></div>													

Visual tool

[illegible]

Project and Change Management, Invoicing

Key Features

Profit is king any way you slice it. The Jobs module allows you to effectively to manage everything on a project from Job Costing, Work Orders, assigning Activities, managing Docs/Photos, and tracking Materials, Employee Hours, Sub-contractors, Parking, Equipment Rentals, Paint Colors. Invoicing and understanding your profit becomes a breeze with your master Job Summary built in!

Job Costing	Work order	Tracking	Activities	Docs&Photos	Materials	Subcontractors	Parking	Equipment/Rental	Colors	Job Summary
Materials Estimated	\$0									
Estimated Hours										
Actual Other Job Costs										
Actual External Hours Worked	0									
Actual Materials Cost	\$0									
Actual Internal Hours Worked	0									
Actual Labor Cost Without burden	\$0									
Total Invoiced										
Materials Variance	\$0									
Additional Work Order hours	0									
Labor Burden	\$0									
Actual Gross Job Profit										

Change orders can easily contribute to 30% of your overall revenue and this is where revenue can also get lost. Look no further – project managers can submit changes orders via our built in mobile app. Never be caught with lost profit or scrambling to add additional projects to your schedule! Never leave operations in the dark again.

Change Order for:

Job

Save draft

Change Work order

Current Work order

Add area

Area name

Item name

Notes

Quantity

Hours

Add item

Invoicing

Generate invoices and get paid on time with auto-reminders all while integrating with QuickBooks Online



Job Profitability Tracking Dashboard

Job Profitability

Export

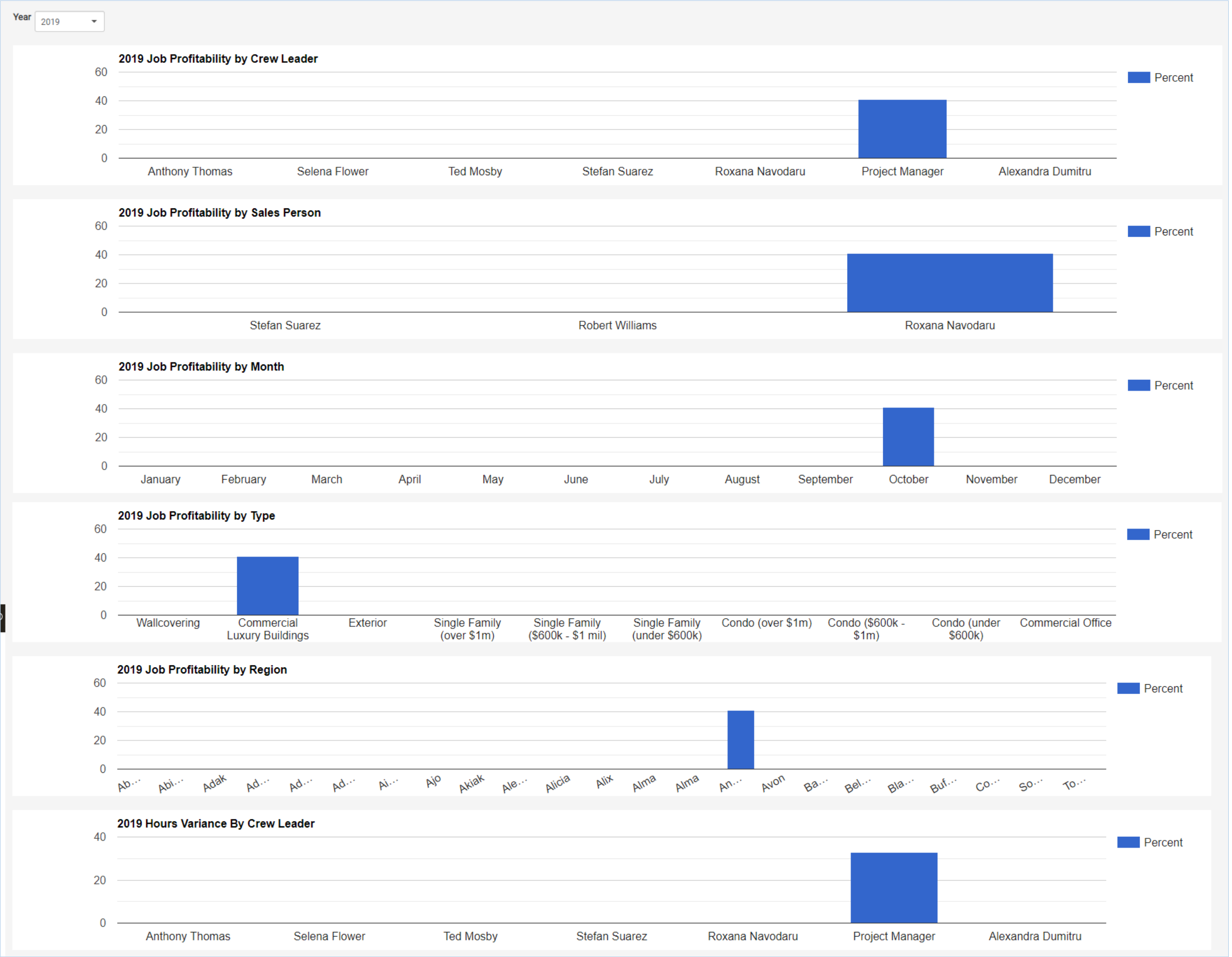
Clear Filters

Date Completed		Job Number	Job Name	Sales Person	Project manager	Job Type	Region	Total Invoiced (Final Sale)		Materials Estimated		Actual Materials Cost		Actual Other Job Costs (Equipment Rental, etc.)		Actual Labor Cost without Burden		Labor Burden (WC & Payroll Tax)		Actual Gross Job Profit		Actual GP%		Estimated Hours		Additional Work Order Hours		Actual Hours Worked		Search	
From	To							From	To	From	To	From	To	From	To	From	To	From	To	From	To	From	To	From	To	From	To	From	To		
		153	Office space reshaping	Roxana Navodaru	Project Manager	Commercial Luxury Buildings	Andalusia				\$22890		\$13484		\$250		\$420		\$84		\$9762		41%		400h		0h		36h		
		152	VW Test 423			Commercial Office			\$36				\$0				\$0		\$0								0h		0h		
		151	Job QB 423	Roxana Navodaru	Alexandra Dumitru	Commercial Luxury Buildings			\$0		\$857		\$0		\$1500		\$0		\$0					40h		0h		0h			
		150	Residential InteriorTestVW				Abilene		\$3231		\$0		\$0				\$0		\$0		\$3231		100%		3h		0h		0h		
		149	Visionware142			Wallcovering	Abilene		\$32		\$0		\$0				\$0		\$0		\$32		100%				0h		0h		
		148	Residential Interior				Alix		\$6006.18		\$0		\$0				\$0		\$0		\$6006.18		100%				0h		0h		
		147	Commercial 419			Exterior	Alix		\$5415.48																						
		146	Residential Interior 419		Alexandra Dumitru	Exterior	Alix		\$1270.34		\$0		\$0				\$0		\$0		\$1270.34		100%				0h		0h		
		145	Residential Interior to lead 417						\$3782.26																						
		144	Residential Interior Lead417						\$5220.72																						
		143	Residential Interior			Wallcovering	Akiak		\$171.2		\$161		\$0				\$0		\$0		\$171.2		100%		0h		0h		0h		
		142	Job test			Wallcovering			\$0				\$0				\$0		\$0								0h		0h		
		140	Job Test 417			Exterior			\$0				\$0				\$5		\$1								0h		0h		
		131	Residential Interior delete						\$288.07																						
		130	Residential Interior delete			Wallcovering	Alicia		\$2649.35		\$12		\$0				\$0		\$0		\$2649.35		100%				0h		0h		

Job Profitability Dashboard

By transforming your field service operations through fresh thinking and innovative technology, you will reduce costs and differentiate your brand.

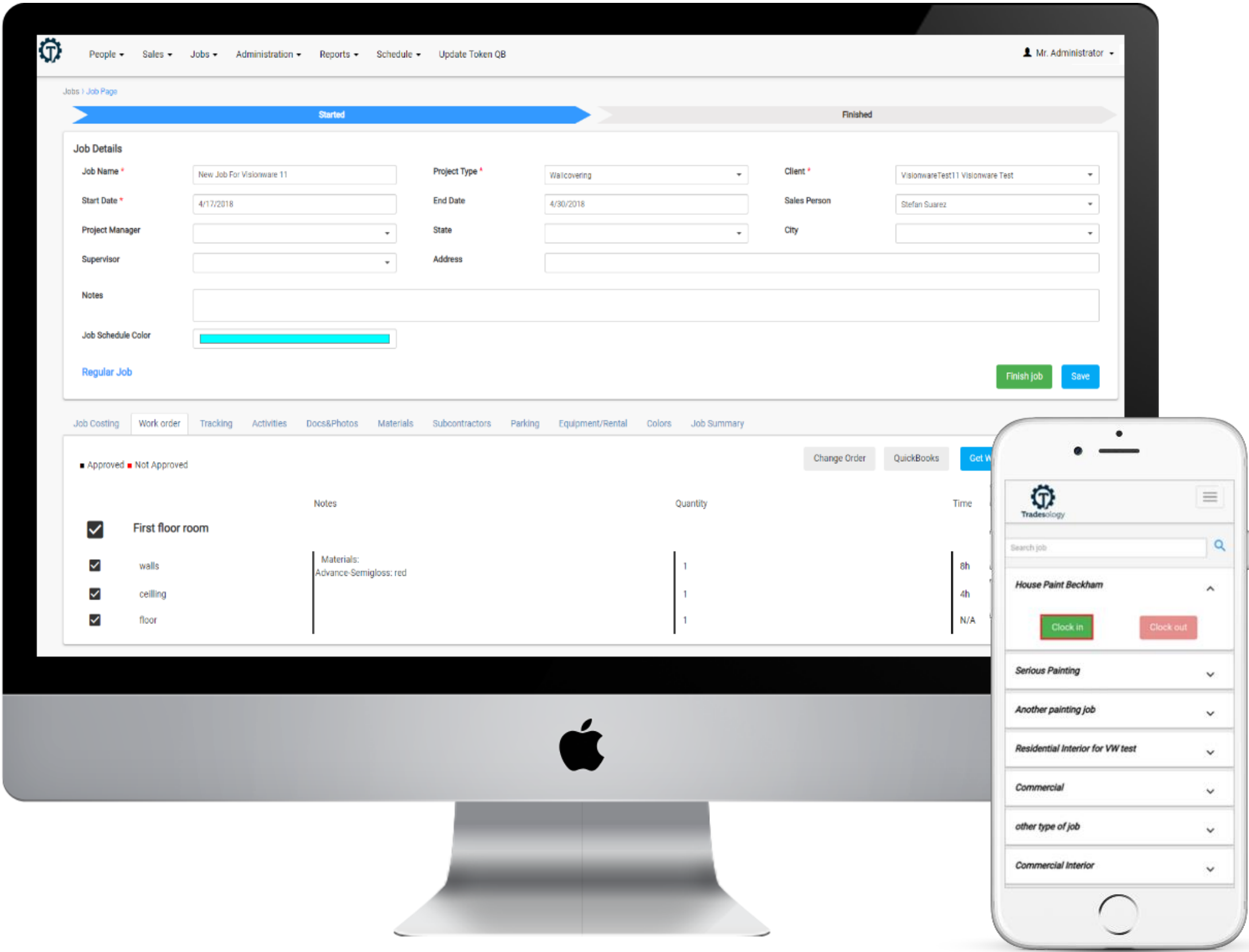
— McKinsey



Field Mobile Application




Employees can easily log in and out from a job with our mobile app. Project Managers can submit change orders and monitor work order hours to make sure projects are running smoothly and on time.



Job Details

Key Features

Job Details for field engineer

Tradesology

People | Paid Time Off | Paid Time Off

Request

Waiting Approval

Approv

Employee Details

Employee *

Ted Mosby

First Name


Ted

Last Name

Mosby

Position

Save draft

Tradesology

Absence

Earned days: Unused Current Year Days (0) = 0

Remaining days (after completion):

Start Date *


End Date *

Back-up Person

Absence Type

Days *

Description

Tradesology

People | Paid Time Off | Paid Time Off

Request

Waiting Approval

Approv

Employee Details

Employee *

Alexandra Dumitru

First Name

Alexandra

Last Name

Dumitru

Position

Cancel

Send to Approval

Save draft

Vision Field Services\ Operations\ Job Tracking

VISION
technology

Time off Request

Key Features

History

Visualize a list with all the time off requests from the application. Access the “+ New Paid Time Request” button from the top of the list to add a new time off request into the application

Request New Time off

Complete a Time off Request:

- Start Date (mandatory field);
- End Date (mandatory field);
- Days (mandatory field);
- Absence Type - the user will choose an option from a dropdown list;
- Back-up Person - the user will choose an option from a dropdown list;
- Description – the users could explain the reason for the Time Off or add some notes about the request.

Approval workflow

Send the request to approval by pressing the “Send to Approval”

Tradesology

People | Paid Time Off | Paid Time Off

Request

Waiting Approval

Approve

Employee Details

Employee *

Ted Mosby

First Name

Ted

Last Name

Mosby

Position

Save draft

Tradesology

Absence

Earned days: Unused Current Year Days (0) = 0

Remaining days (after completion):

Start Date *

End Date *

Back-up Person

Absence Type

Days *

Description

Tradesology

People | Paid Time Off | Paid Time Off

Request

Waiting Approval

Approve

Employee Details

Employee *

Alexandra Dumitru

First Name

Alexandra

Last Name

Dumitru

Position

Cancel

Send to Approval

Save draft

Vision Field Services\ Operations\ Job Tracking

VISION
technology

Clock in and Clock out

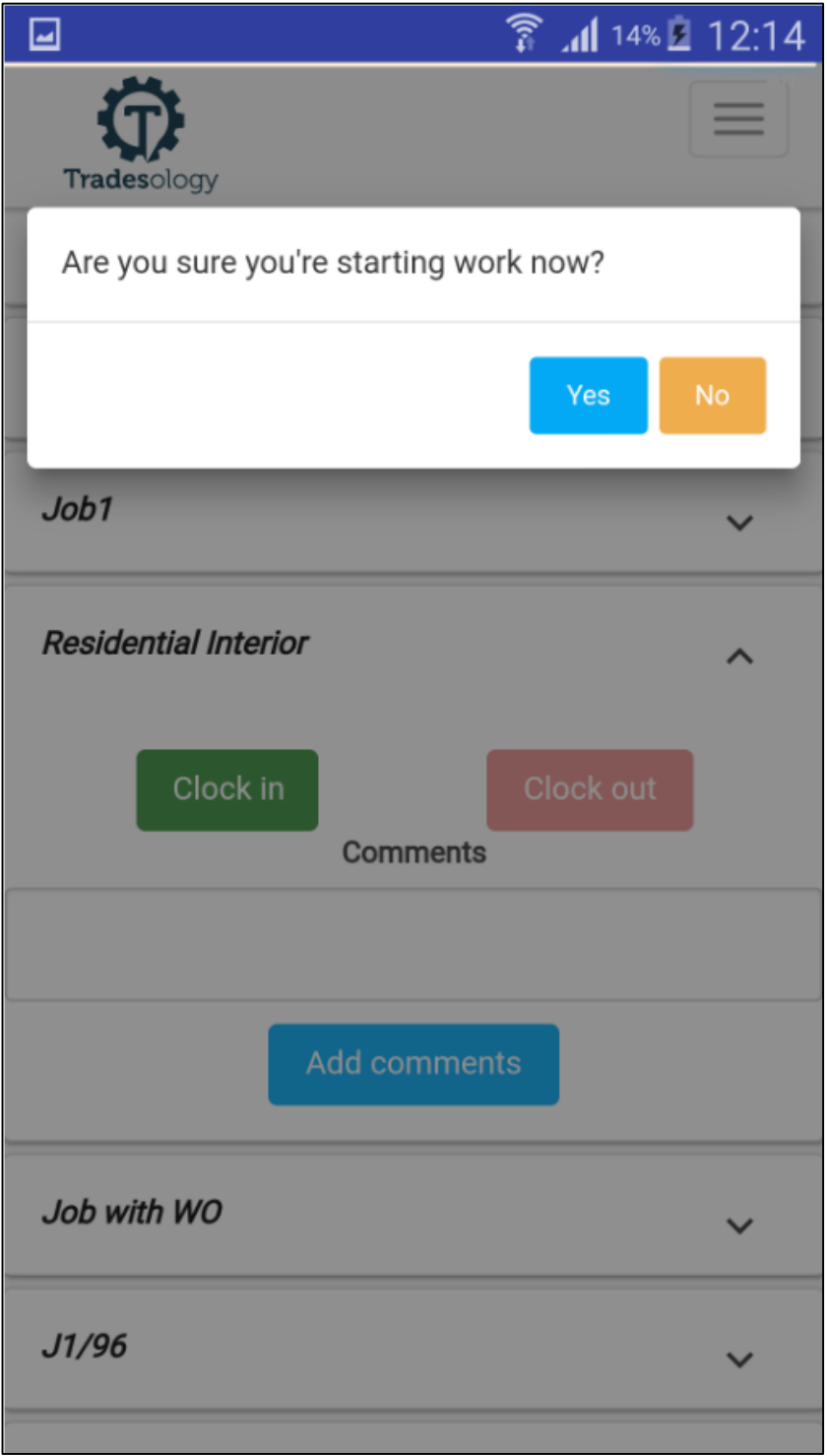
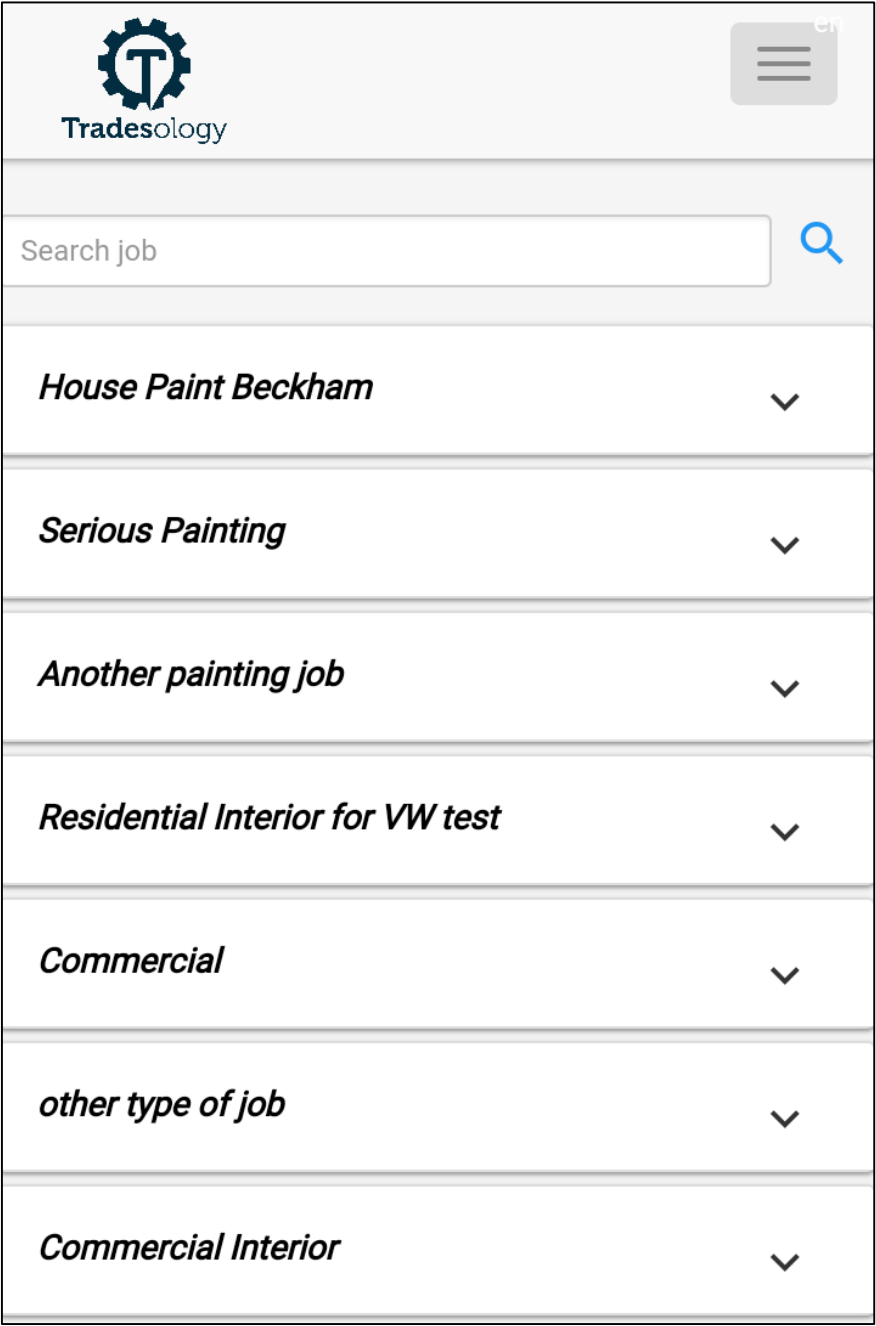
Key Features

Clock In

The application will open the job list. Employee can see just the jobs he is assigned

Clock Out

When the user finish working at the job, he will access the Clock Out button



Human Resources Administration



vision
Field Services

People ▾ Sales ▾ Jobs ▾ Administration ▾ Reports ▾ Schedule ▾ Update Token QB

Administrator ▾

People | Candidates | [Candidate Page](#)

Test test

Last update 3/12/2018

Create Employee

Candidate Summary

Candidate Type *Apprentice*

Applications History

App nameLast Step DateSourcePositionStatusDetails

vision
Field Services

People ▾ Sales ▾ Jobs ▾ Administration ▾ Reports ▾ Schedule ▾ Update Token QB

Administrator ▾

People | Employees | [Employee Page](#)

General Information

First Name *Roxana

Last Name *Navodaru

Social Security #121-15-1545

Date of birth *10/22/1996

Date of hire *7/25/2017

Active☒

Save

Contact Details

Phone *05448-1458

Cell

Company Email *roxana.navodaru@visionware.ro

Personal Email *roxana@larkin.com

Emergency Contact Name

Emergency Contact Phone

Emergency Contact Email

Addressstrada Ernest Juvara nr. 18

StateNevada

City/TownAustin

Zip code060104

Job Details

PositionProject Manager

Shirt SizeM

PTO Details

Year2018

Reset date7/25/2018

On-boarding Checklist

Document Type

☒ Job Application

☒ Driver's License

☐ Social Security Card

☒ Vehicle Info

Vehicle Information

☒ Company vehicle ☐ Personal vehicle

Year

Make

Model

License Plate #

Maintenance Schedule

Vin #

Documents

There are no items.

Tradesology

Search job

House Paint Beckham

Clock inClock out

Serious Painting

Another painting job

Residential Interior for VW test

Commercial

other type of job

Commercial interior

A platform to help you manage an effective recruiting process, track employee growth and training, and manage human resources, allowing you to focus on what matters most: keeping your great talent.

Employee Administration

Key Features

Managing employees is made simple with tracking positions, pay rates, emergency info, paid time off, vehicle monitoring, reviews, and much more!

General Information

Store employee general details like name, date of birth, social security number.

Contact details

Manage employee contact details.

Vehicle Information

Keep track of the vehicles. Either company or personal car is used, fill in all needed details.

Evaluations

Upload your employee evaluation results and add some useful notes.

Documents

Store all employee related documents.

Paid Time Off

Summary of the paid time off requests including period of time, status and absence type.

Job Details

Keep accurate data regarding the job details and needed materials.

PTO

Keep yearly situation of the PTO earned days for each employee.

On/Off Boarding check list

Improve your On/Off boarding management based on predefined checklists.

Training checklist

Keep an accurate checklist of required training for each employee according with job type, experience, etc.

People | Employees | Employee Page

General Information

First Name *

Roxana

Last Name *

Navodaru

Social Security #

121-15-1545

Date of birth *

10/22/1996

Date of hire *

7/25/2017

Active

☒

Save

Contact Details

Phone *

05448-1458

Cell

Company Email *

roxana.navodaru@visionware.ro

Personal Email *

roxana@larkin.com

Emergency Contact Name

Emergency Contact Phone

Emergency Contact Email

Address

strada Ernest Juvara nr. 18

State

Nevada

City/Town

Austin

Zip code

060104

Job Details

Position

Project Manager

Pay Rate *

20

Shirt Size

M

Jacket Size

L

PTO Details

Year

2018

Reset date

7/25/2018

Earned days

25

Total used days

0

Last year days

0

1

On-boarding Checklist

Document Type

Notes

File

☒

Job Application

↑

☒

Driver's License

↑

☐

Social Security Card

↑

☒

Vehicle Info

↑

Off-boarding Checklist

Document Type

Notes

File

☐

Remove Direct Deposit and Notify

↑

☐

Remove Payroll

↑

☐

Collect Ritz Parking Card

↑

☐

Remove Disability

↑

Training Checklist

Document Type

Notes

File

☐

Texting and Driving

↑

☐

Harassment and Discrimination Training

↑

☐

Schedule RRP Training

↑

☐

Schedule RRP Physical Exam/Bloodline Testing

↑

Vehicle Information

☒ Company vehicle ☐ Personal vehicle

Year

Make

Model

License Plate #

Maintenance Schedule

Vin #

Documents

Document Name

Notes

Identity Card.pdf

↓

🗑

Passport.pdf

Passport

↓

🗑

Job Offer.pdf

↓

🗑

Evaluations

Document Name

Notes

demo.pdf

Yearly Review

↓

🗑

Paid Time Off

Status

Absence Type

Start Date

End Date

Waiting Approval

2/25/2018

2/26/2018

🔗

Rejected

3/22/2018

3/27/2018

🔗

Vision Field Services\ People Administration

VISION
technology

Candidates Administration

Key Features

Finding talent isn't always easy. That is why is so important to have a great recruiting pipeline. Easily track potential candidates for employment, assign interview tasks, upload documents, and even set-up trial periods.

Candidate Summary

Store candidate general information like name, date of birth, contact details.

Application History

Keep track of all candidate application history and details.

Documents

Store all candidate and interview related documents.

Create Employee

Automatically transform candidate into permanent or trial employee.

People | Candidates > Candidate Page

Test test George

Last update 10/15/2019

Create Employee

Candidate Summary

Candidate Type *Apprentice*

Phone *3334-6555*

Email *TTM5@vw.com*

State *Alaska*

City *Buckland*

Address *Main Blv. No 5*

ZIP *4345435*

Birthday *10/23/2001*

Notes

Applications History

App name	Last Step ...	Source	Position	Status	Details
App name			Apprentice		<div></div> <div></div>
PM FC	10/15/201	Head Hunt...	Project Ma...	Future can...	<div></div> <div></div>
New Buil...	10/15/201	Recruiting ...	Level 2 Ma...	Do not pur...	<div></div> <div></div>

Documents

Name	Notes	Uploaded date	Uploaded by
Activity.pptx		3/19/2018	admin

Application details

Application Name

PM FC

Application Date

3/12/2018

Function

Project Manager

Source

Head Hunting

Status

In-person interview scheduled

Steps

#1. *Future candidate*

Date

10/15/2019

Start Hour

10:50

End Hour

11:50

Notes

#2. *In-person interview scheduled*

Date

10/15/2019

Start Hour

End Hour

Notes

Close

Save

Application Details

Increase recruiting efficiency by defining the necessary steps for each open position. Track all recruiting details according with each step.

Vision Field Services\ People Administration

VISION
technology

Subcontractors

Key Features

- Track and manage relationships with sub-contractors including their billable rate, agreements, W-9, certificates of insurance and workman’s comp, and training certifications. The goal here is to always protect your company.
- Information**
 - Store subcontractor relevant information
- Documents**
 - Predefined list of necessary documents in order to work with irrespective entity

People | Subcontractors > Subcontractor Page

Subcontractor Information

First Name *

First Name 2

Last Name *

Last Name 2

Company Name

Subcontractor 2

Billable Rate

67

Cell *

023321545

Office Phone

Address

Pitesti Arges

Email Address

ct@mail.com

Save

Documents

	Document Type	Notes	Uploaded date	Uploaded by	Expiring date	File name	
<input type="checkbox"/>	Subcontractor Agreement	<div>Lorem Ipsum is simply dummy text</div>	10/15/201	admin	2/25/2018	demo.pdf	<div><div>i</div><div>↓</div><div>↑</div></div>
<input type="checkbox"/>	W-9	<div></div>	10/15/201	admin	2/25/2018	demo.pdf	<div><div>i</div><div>↓</div><div>↑</div></div>
<input type="checkbox"/>	Certificate of General Liability Insurance	<div></div>					<div><div></div><div></div><div>↑</div></div>
<input type="checkbox"/>	Certificate of Workman's Comp	<div></div>					<div><div></div><div></div><div>↑</div></div>
<input type="checkbox"/>	RRP Training Certification	<div></div>					<div><div></div><div></div><div>↑</div></div>
<input type="checkbox"/>	Subcontractor Guidelines Reviewed	<div></div>					<div><div></div><div></div><div>↑</div></div>

Vision Field Services\ People Administration

VISION
technology

Employee Tools

Key Features

Paid Time Off Request

No more excel spreadsheets and calculations by hand! Requesting time off is made simple with our mobile request app. Employees just submit their request and operations approves it or not. It then easily gets tracked based on their total Paid Time Off schedule for the year.

People | Paid Time Off | Paid Time Off

Request

Waiting Approval

Approved

Rejected

Request date 2/6/2018

Employee Details

Employee *

Roxana Navodaru

First Name

Roxana

Last Name

Navodaru

Position

Project Manager

Cancel

Approve

Reject

Absence

Earned days: Unused Current Year Days (0) = 0

Remaining days (after completion): -1

Start Date *

2/25/2018

End Date *

2/26/2018

Back-up Person

Absence Type

Days *

1

Description

Employee	Monday 10/14/2019	Tuesday 10/15/2019	Wednesday 10/16/2019	Thursday 10/17/2019	Friday 10/18/2019	Saturday 10/19/2019	Regular			
Stefan Suarez	0 : 00	0 : 00	0 : 00	0 : 00	0 : 00	0 : 00	0 : 00			
Alex Beciu	0 : 00	0 : 00	0 : 00	0 : 00	0 : 00	0 : 00	0 : 00			
Cristi Test	0 : 00	0 : 00	0 : 00	0 : 00	0 : 00	0 : 00	0 : 00			
Roxana Navodaru	0 : 00	0 : 00	0 : 00	0 : 00	0 : 00	0 : 00	0 : 00	0 : 00	\$20	\$0
Ted Mosby	0 : 00	0 : 00	0 : 00	0 : 00	0 : 00	0 : 00	0 : 00	0 : 00	\$0	\$0
Tyler Durden	0 : 00	0 : 00	0 : 00	0 : 00	0 : 00	0 : 00	0 : 00	0 : 00	\$12	\$0
Michael Test	0 : 00	0 : 00	0 : 00	0 : 00	0 : 00	0 : 00	0 : 00	0 : 00	\$0	\$0
Edward Norton	0 : 00	0 : 00	0 : 00	0 : 00	0 : 00	0 : 00	0 : 00	0 : 00	\$0	\$0
First Last	0 : 00	0 : 00	0 : 00	0 : 00	0 : 00	0 : 00	0 : 00	0 : 00	\$0	\$0
Jackson Avery	0 : 00	0 : 00	0 : 00	0 : 00	0 : 00	0 : 00	0 : 00	0 : 00	\$0	\$0
Jhon Anton	0 : 00	0 : 00	0 : 00	0 : 00	0 : 00	0 : 00	0 : 00	0 : 00	\$20	\$0
TEST DE TEST	0 : 00	0 : 00	0 : 00	0 : 00	0 : 00	0 : 00	0 : 00	0 : 00	\$0	\$0
Andrew Prescot	0 : 00	0 : 00	0 : 00	0 : 00	0 : 00	0 : 00	0 : 00	0 : 00	\$1.5	\$0
Test March5	0 : 00	0 : 00	0 : 00	0 : 00	0 : 00	0 : 00	0 : 00	0 : 00	\$250	\$0
Alexandra --	0 : 00	0 : 00	0 : 00	0 : 00	0 : 00	0 : 00	0 : 00	0 : 00	\$250	\$0
Alexandra Dumitru	0 : 00	0 : 00	0 : 00	0 : 00	0 : 00	0 : 00	0 : 00	0 : 00	\$150	\$0

Worked Time
Visual sheet with worked time per employee for each day

Vision Field Services\ People Administration

vision
technology

Technology and Integration



Create complex applications in visual designer, with no code and high flexibility for further changes and customizations with Vision App Maker Platform.



Vision App Maker Suite

Build complex applications in visual designer, without code.

- Easy build new application from scratch
- Integrate existing platforms and legacy systems into unified application
- Digitalize your business workflows through business processes re-engineering
- Enhance Business-Integration Speed & Agility
- Optimize operations with processes prepared for rapid evolution
- Drive innovation by quickly creating innovative digital products and services
- Accelerates Transformation
- Simulate working software much earlier in the cycle enabling project team to iterative prototyping and agile development

Our customers are successfully rollout their daily operation on applications powered by Vision App Maker:



Aerotravel



Vision App Maker is a mature platform with 100+ implementations for various industries: Banking, Insurance, Automotive, Pharma, Services, Government, Distribution, Travel, Field Services.

Vision App Maker Suite

Features

Powerful Integration Capabilities

Allows integration with any system through a plugin mechanism. Data can be imported from ERP, CRM, DMS or legacy systems and can be further used in workflows, rules, interfaces and document templates.

Workflow Visual Editor

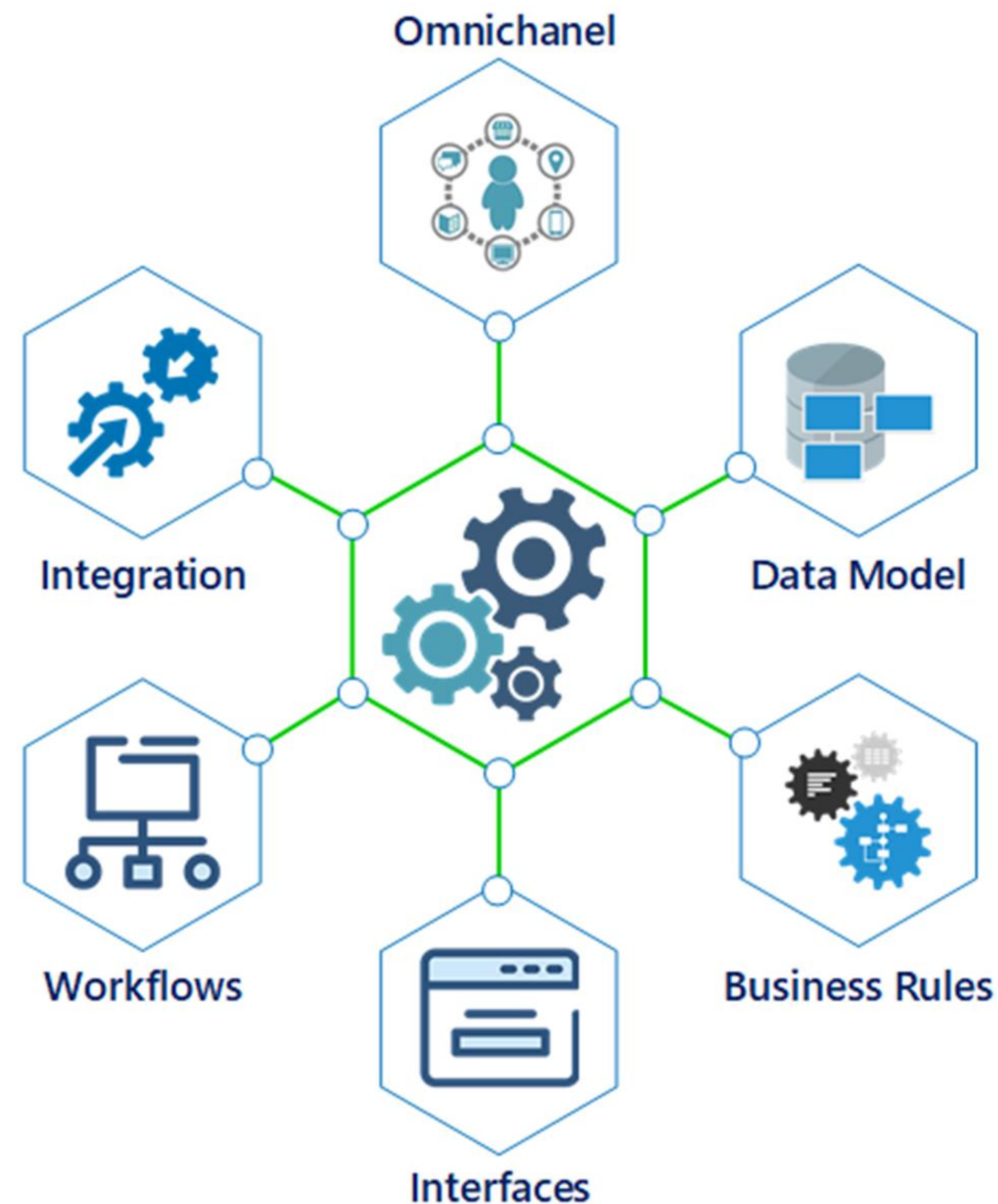
Flows can be simple or complex, from procurement approval to credit management or back-office solutions.

Document Generation

Design and generate document templates that can then be used in workflows to print any type of forms, like Quotes, Contracts or Invoices.

Omnichannel

Same user experience across all channels:
Internal Portal – External Portal – Mobile – Public API



Interface Visual Editor

Generate responsive UI accessible from any web browser or mobile device. Build Single Page Applications providing a fluid, desktop-like user experience.

- Modular, multi layered, decoupled architecture, enabling security segregation and high availability implementation
- Two factor and self registration authentication mechanism
- Identity and Access systems integration (ex. Active Directory)
- Plugins for various commercial systems (Microsoft CRM Dynamics, SharePoint, ERP, DMS, etc.)
- Persistent vs. Non-persistent data mechanism

Data Model Graphic Designer

Definition of simple and complex data types, cardinalities, lists, parameters and entities for any type of application.

Business Rules

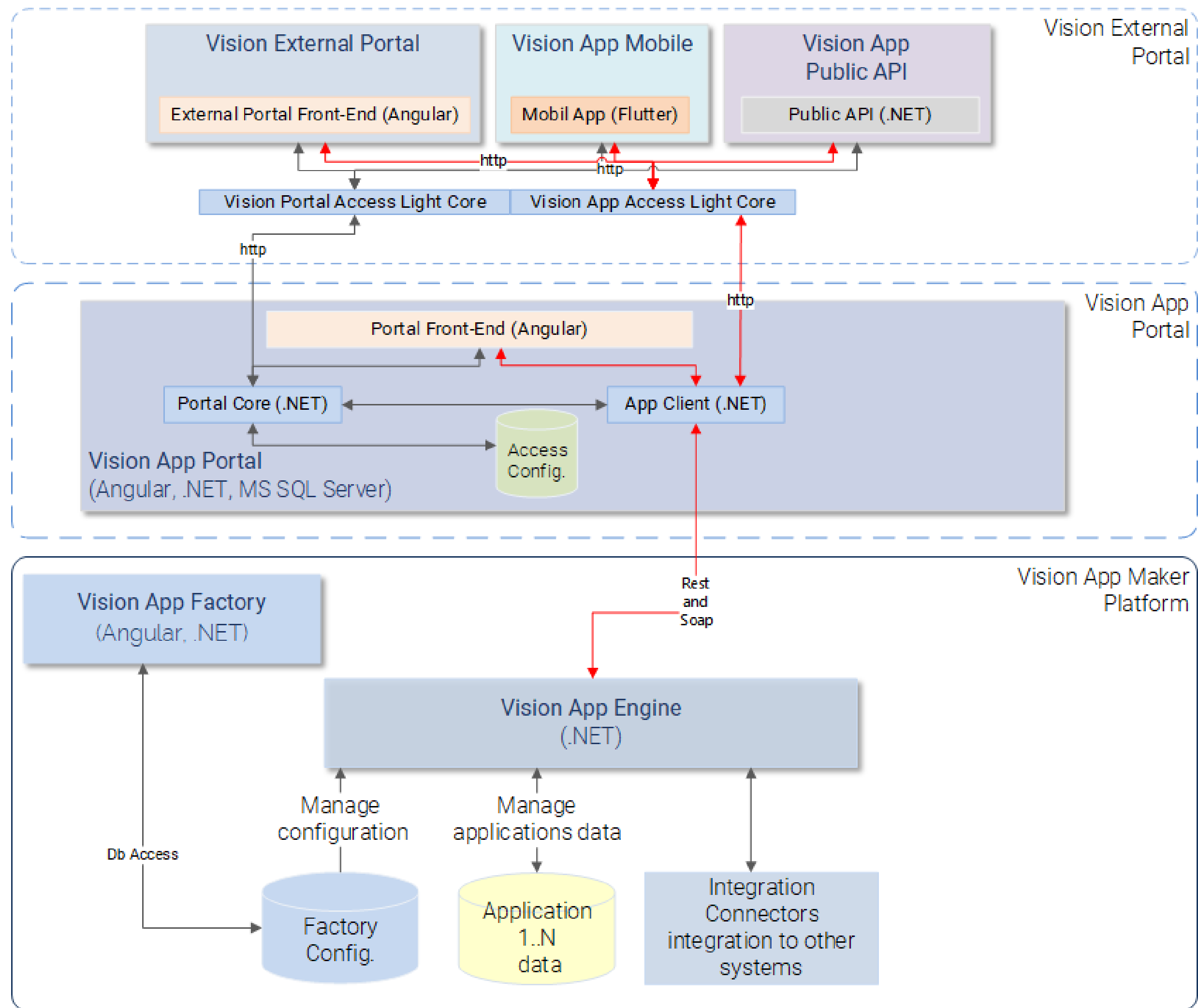
Can be designed by any user who has the ability to write formulas in Excel. You can easily implement scoring, escalation and notifications or you can manage how information is displayed and processed in the interface, documents and reports.

Reporting and Alerts

Generate various types of alerts within workflows, from information transmitted by e-mail to reports generated by the system and exported in a predefined format.

Vision App Maker Suite

Technology stack



Vision App Maker components were developed with modern and appropriate technologies for each layer purpose: reliable back-end developed in Microsoft .NET and flexible, responsive and rich front-end based on Java Script and Angular.



+40 728 006 678
sales@vision.ro
www.vision.ro



Dr. Ernest Juvara 16, Sector 6, Bucuresti,
România
148, Republicii Bulevard 3rd floor, Pitesti,
Arges, România

The information contained in this document is confidential and is legally protected. The right to use them, in whole or in part, has only their addressee or other authorized persons. If you are not the recipient of this document you are officially informed that any reference, copying, distribution or action regarding the content of this information is prohibited and may be against the law.

This document does not contain any personal or business confidential data. All testing and demo data used in the application screens is generated randomly using public sources of data. Any similarities with real situation is just a coincidence.