ONE BIG GREEN

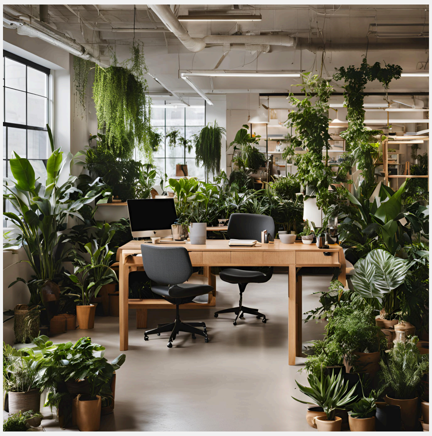
Testing guide

to help you evaluate the new product features

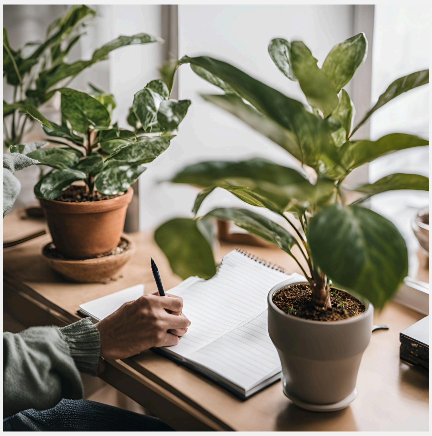
You will be testing:

Adding your team members

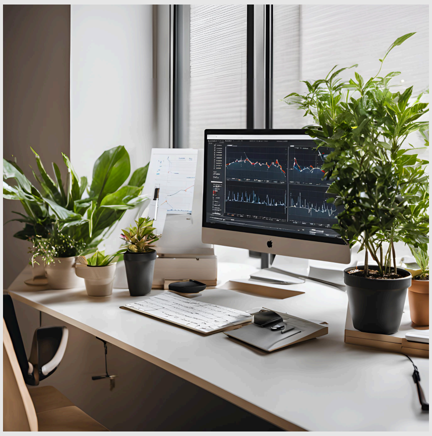
Managing service sites and displays



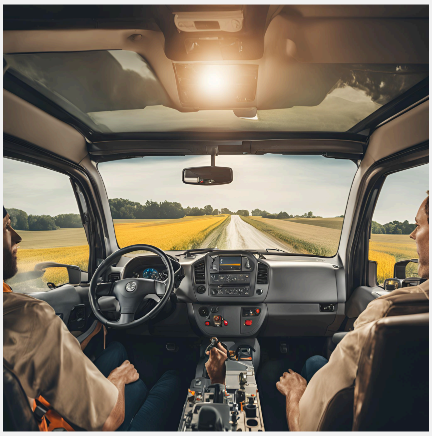
Adding plant notes



Monitoring plant health



Scheduling service visits



Collecting the visit reports

Prep works

To start testing One Big Green, you will need a customer account. If you don't have it already, please request it here.

From our experience, it's best to have at least two people involved—someone with the planner/supervisor function who has a computer and a field technician who has a mobile phone (it can be iOS or Android). You can choose to test the product with more of your colleagues, but having at least two is essential to understanding the data flow.

Step-by-step testing

Invite your colleagues

Start with sending out the invites to people who will participate in the trial. You can do that in the People section of the Back office.

Once the invites are out, make sure your colleagues accept them and are aware of how to get to the Back office (for office positions) and install their iOS or Android mobile apps (for field roles).

Create your first service site, add the service(s) you provide, and populate it with some plant displays

Create your first service site in the Service Sites section, and add all the relevant site details. Assign an Account manager if they also participate in testing. Optionally, you can also set up the structure of this site by creating the floors, zones, and rooms, which will ensure consistency when defining the location of your plant displays later.

Once the site is created, add the service and assign a Technician and a Supervisor. *Note that you can only assign to the people who accepted their invites.*

Proceed to the list of displays in the service you just created and create your first plant display. Upload a picture, note the display health (defined in stars), fill in the display details, and indicate where this display is located.

After the display is created, add the details of the planter and the plant (or plants) in this display. To select the plant type, just start typing the scientific or common name of a plant in the plant type field, and our system will suggest the options. If you can't find the plant type you are looking for, please proceed to the Plant varieties and nicknames section and request adding the missing plant type to the main database.

Optionally, you can test an import function to import the list of service sites, and the plant will displays in them. For each of the imports, there is an XLS template you can use to prepare your data for import.

Test how the service site reflects in the mobile app

Get your field colleague(s) to log into the mobile app and check the Service sites section. By default, they will see the My Sites section (the sites where they are assigned), but at any time, they can check the other service sites, too.

Pick a random display of a random service and try editing its properties, including a photo.

Create display notes

It's best if you test it two ways.

Create a display note from the app (optionally with a picture) and check how it reflects in the Back office. Then, create another display note in the Back office and check how it reflects in the app.

Check the Display health section

In the Back office, check the Display health section. This is a report that gives you a summary of the star situation in your service portfolio.

Try filtering the results by choosing a specific person (Technician, Supervisor, or Account manager) or a specific service site. Or just apply the filter to the number of stars that interests you, and check all the relevant displays below.

Create some vehicles

In the Vehicles section of the Back office, create a vehicle or two, indicating the type of the vehicle and whether they are hard-assigned to a specific person.

Schedule a visit

Go to the Service visit planning section and create a new service visit. Start by picking the site and the job, and the system will automatically prefill your assigned Technician and show their availability.

You can choose between a one-off or recurring visit and indicate whether there is a strict window for this visit or if it can be done anytime during the day (aka flexible). In case of recurring visits, you can schedule them indefinitely into the future or until the end of your contract. *Please note that in the latter case, the end contract date has to be added to the relevant service.*

Imitate a working day of a Technician

Get the Technician to start their working day, pick the vehicle they are using, and log their starting mileage. They can always pause their working day by logging a break. Later, all this will be reflected in the Timesheets report.

Imitate starting a specific job by clicking on it. The first tab "Start" will remind them what needs to be done. The "Displays" tab is there for them to log all the standard actions (like watering and fertilizing) as well as the non-standard ones (like reporting a missing display or doing a pest-prevention routine). After the Technician is done with the service, in the "Finish" tab, they can see the summary of everything they have done. Confirming that wraps up a job, records the time spent at the site, and sends the report on the service visit to the office.

Check the Service visits report

In the Back office, go to the Service visits report and check the list of all the service visits. Select the one that interests you and check how the information on what has been done is reflected.

Check the Timesheets and the Mileage and commute reports

In the Back office, check the Timesheets report. This is a breakdown of all the time your team members spent on various activities. Later, we will add geo-fencing to help you verify the location of all the clock-ins and clock-outs.

The Mileage and commute report is there for you to check the mileage of all the vehicles you previously created.

Both are exportable into XLS for payrolling and reimbursements.

What is coming next:

What you have seen so far is only the first release of the product. In the near future, we are planning a few more releases with the new cool features to help you manage your company.

- **Release II (current ETA October-November 2024):**
    - Work orders, Issues and Replacement requests with the corresponding reports
    - the first version of the Purchase orders
- **Release III (ETA December 2024):**
    - GPS fencing for all your time tracking to verify the location of your team members
    - QA rounds planning and QA report
    - Delivery and installation planning
- **Release IV (ETA February 2025):**
    - Equipment and Warehouse inventory
    - Product catalog that integrates with the top industry suppliers, full version of the Purchase orders as well as Purchasing report
    - Report on the use of chemicals
- **Release V (ETA April 2025):**
    - Budgets and Extra spending report
    - Service proposals and Installation proposals
    - Integration with the most popular accounting products (QuickBooks, Xero, Sage)
- **Release VI (ETA June 2025):**
    - Adjustable job settings and user permissions
    - Integration with the most popular CRM solutions (Hubspot, Pipedrive)

Have a product idea?

While testing our product and imagining how it would work for your company, you might have thought of something that we haven't. We are very much open to customer feedback and will happily hear about what you have in mind.

Share your idea

Ready to deploy One Big Green?

If you are impressed with our product and want to sign up for a subscription plan, please schedule an onboarding call with us. We will discuss the implementation plan for your company and set you up in a matter of hours.

Schedule the onboarding call now