

FSMv5: How do Retailers schedule, assign, & unassign a Task

Summary

Audience: Retailers

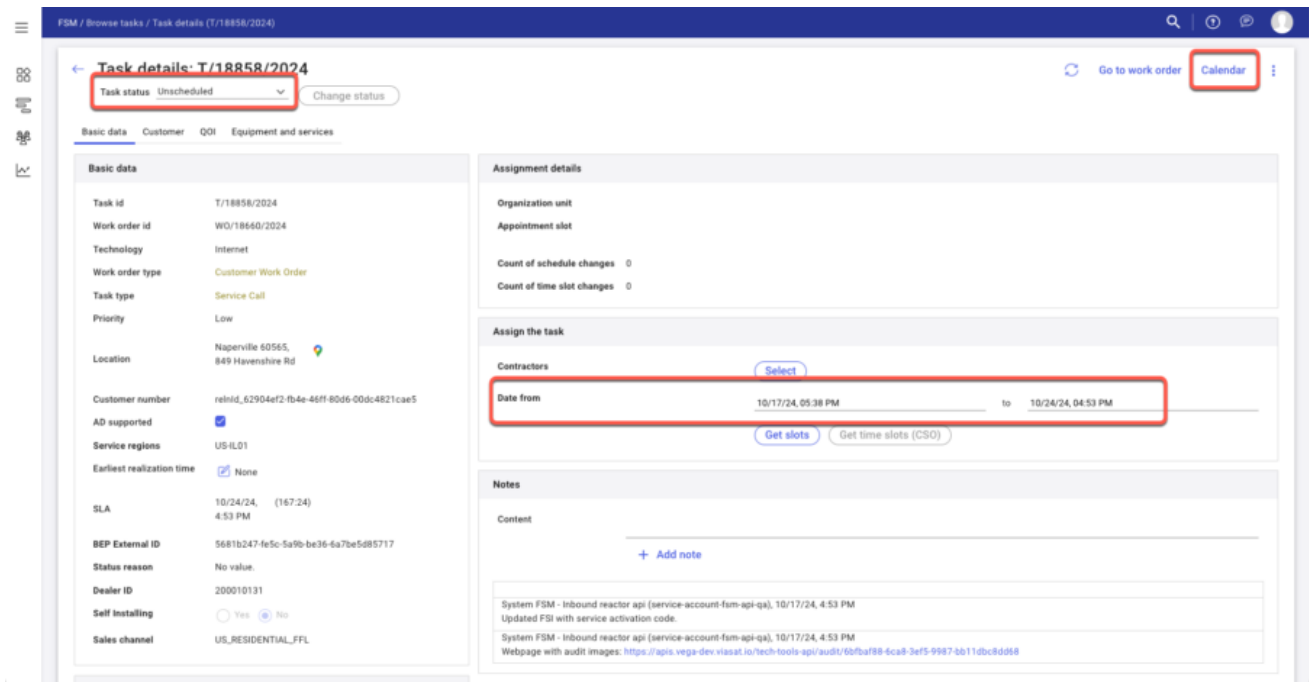
This Job Aid is for all FSM Retailers users and individuals who schedule installations and service calls using the FSM website to manage orders and tasks.

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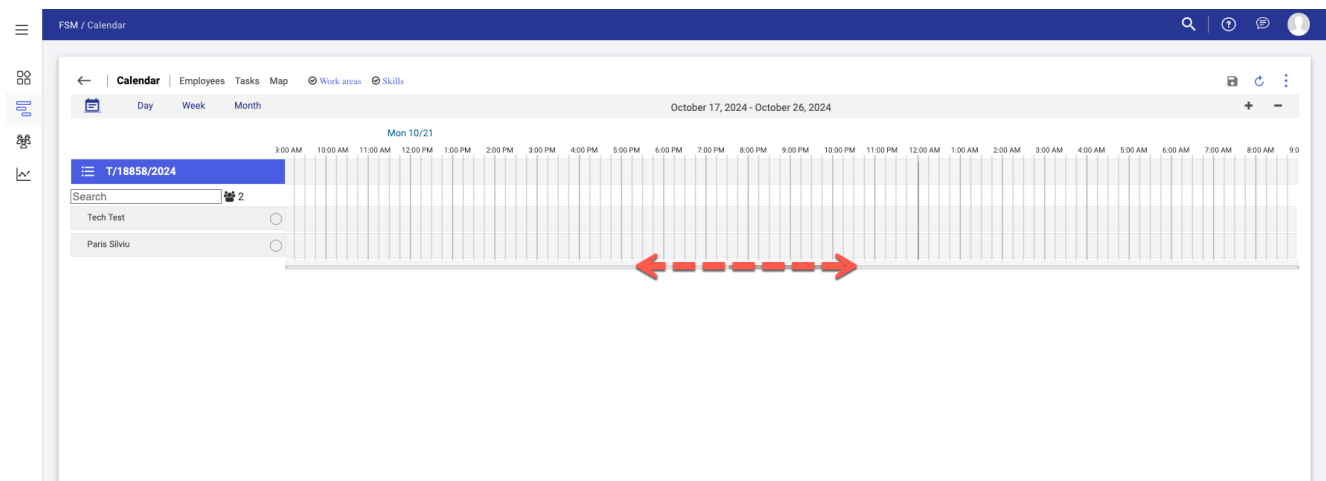
Schedule a Task

Open the **Unscheduled** Task and verify the **Date** from date and time range.



Click **Calendar** in the top right corner.

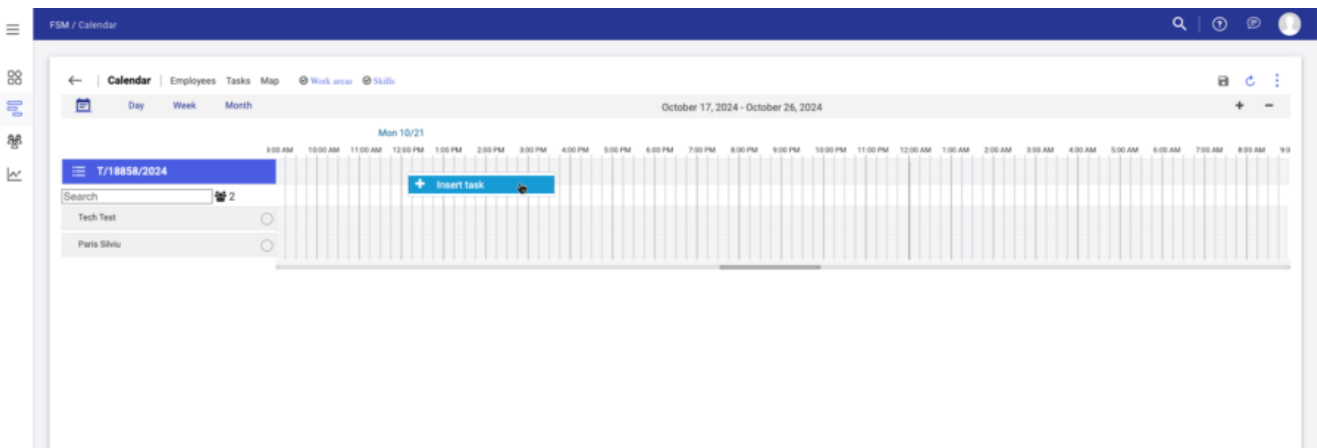
The Calendar window opens.



Click and drag the scroll bar at the bottom to find the correct date and time for the Task.

Note: You can return to the **Task details** page by clicking the **Task id**.

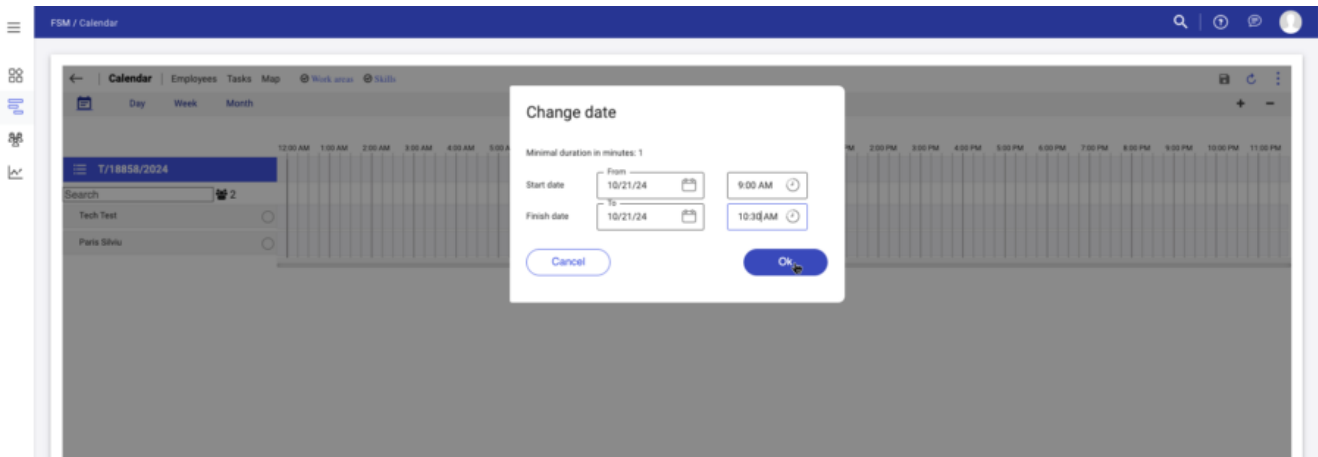
Now we need to set the Task date and time.



Right-click in the **Task id** row and select **Insert task**.

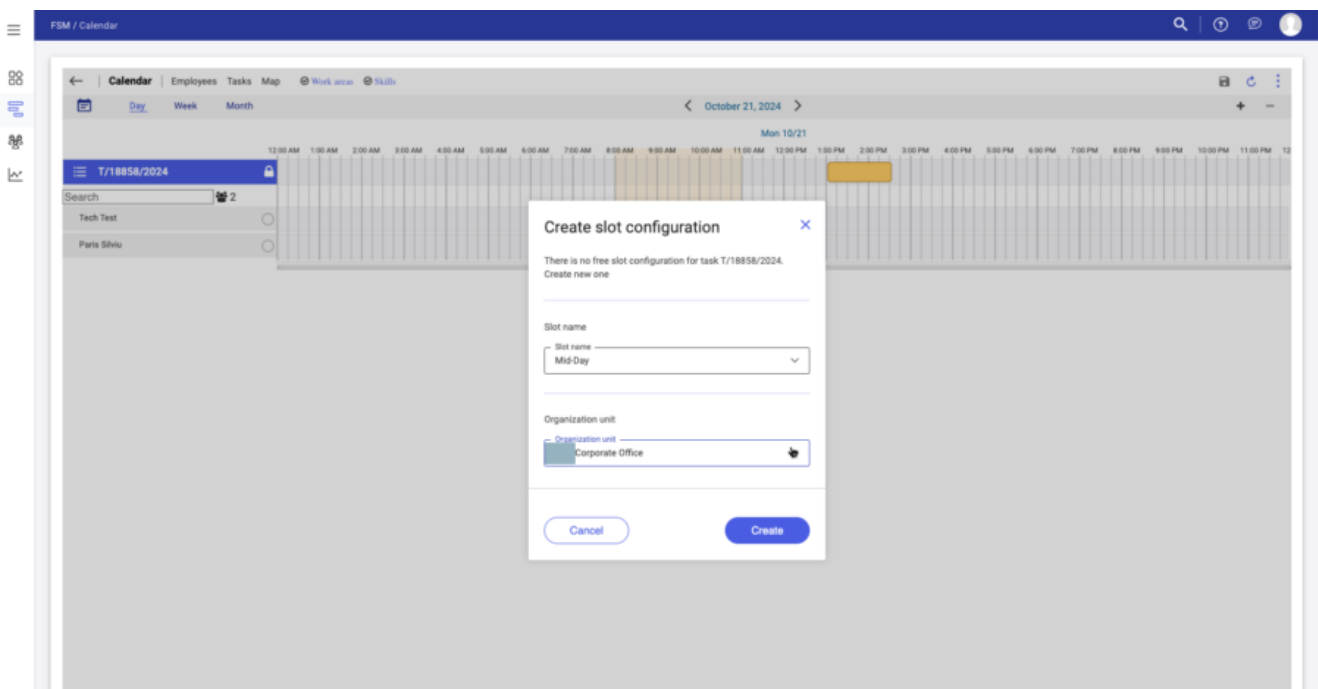
The Change date window opens. Verify the **Start date** and **Finish date** are correct.

Set the start and finish times.



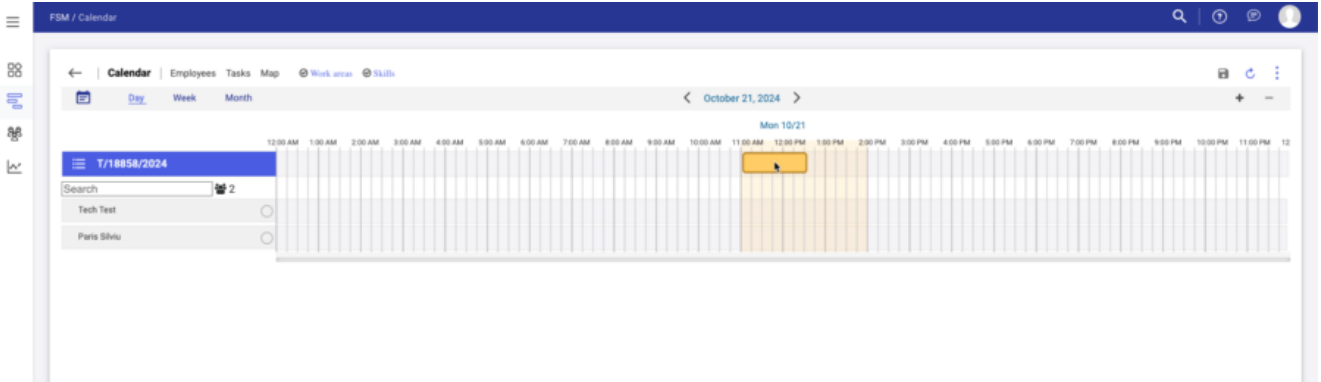
Click Ok.

The Create slot configuration window opens. Verify the Slot name and Organization unit are correct.



Click the Create button.

The Task time slot is now created and the appointment time is set.



Next, we want to assign the Technician to the Task

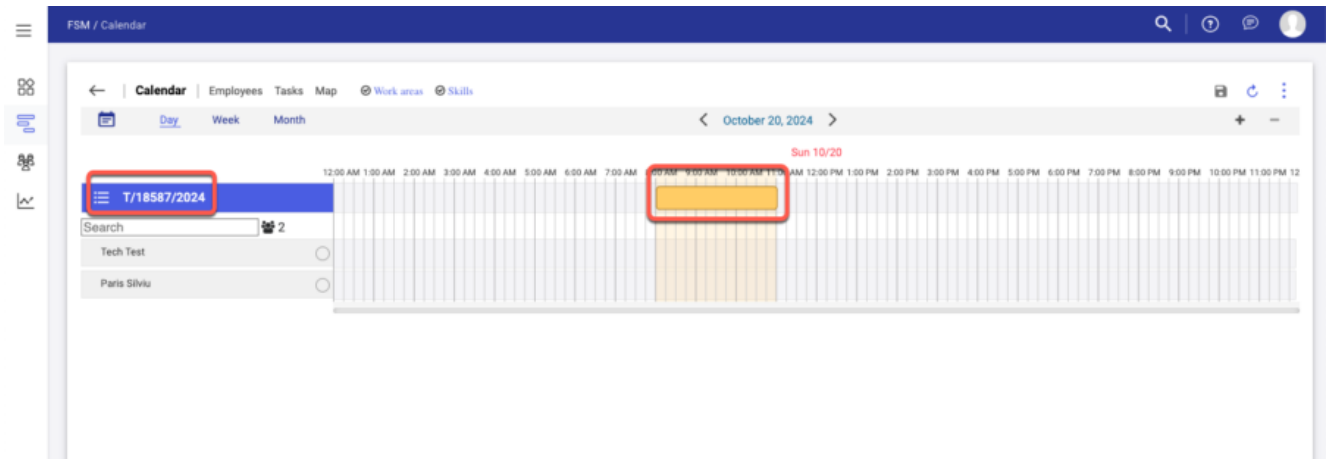
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Assign Tasks

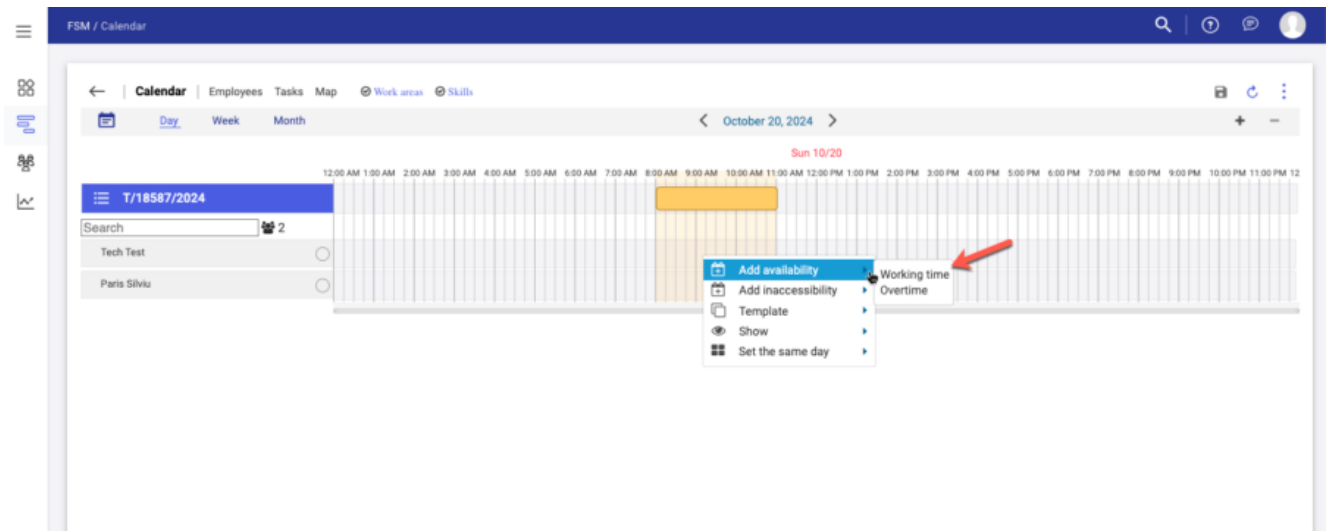
To assign a task, open the **Calendar** view of the task.

The **Appointment slot** is displayed in yellow in the Task id row.

Remember: You can return to the **Task details** page by clicking the **Task id**.

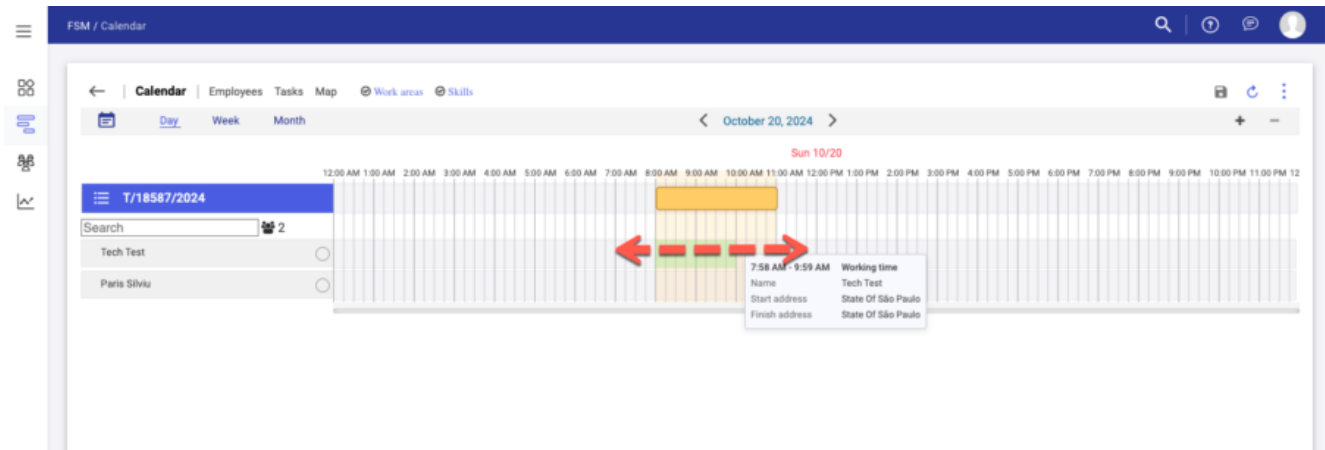


The Technician must have a working time setup to assign the Task.



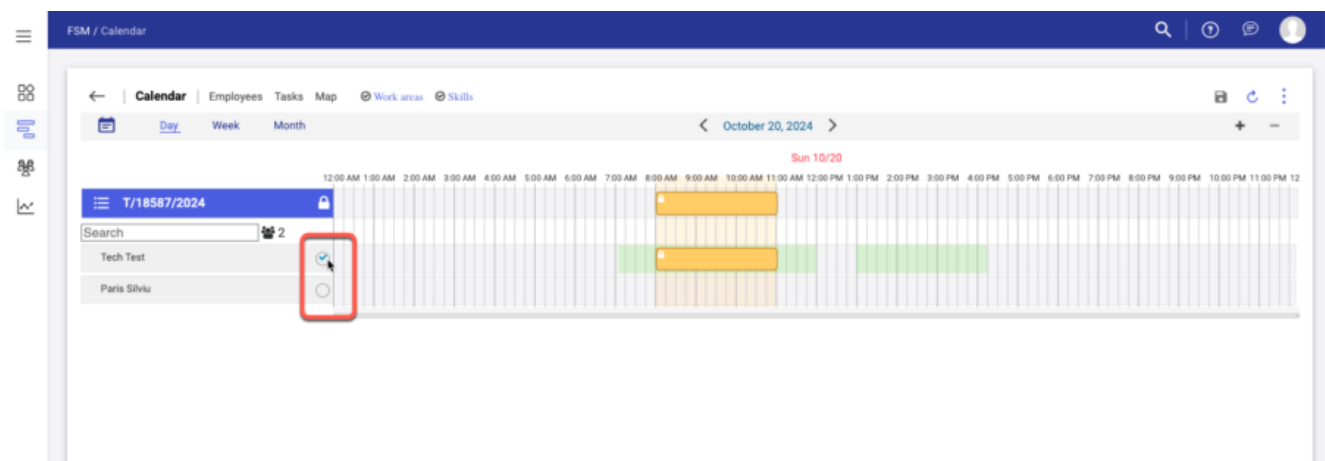
Right-click on the Technician row of the calendar. Hover over **Add Availability** and select **Working time**.

A green bar will be inserted. This represents the technician's available working time.



Drag the green bar in either direction to extend available work times. The green bar must be within the same time limit or greater than the appointment slot to assign the work order.

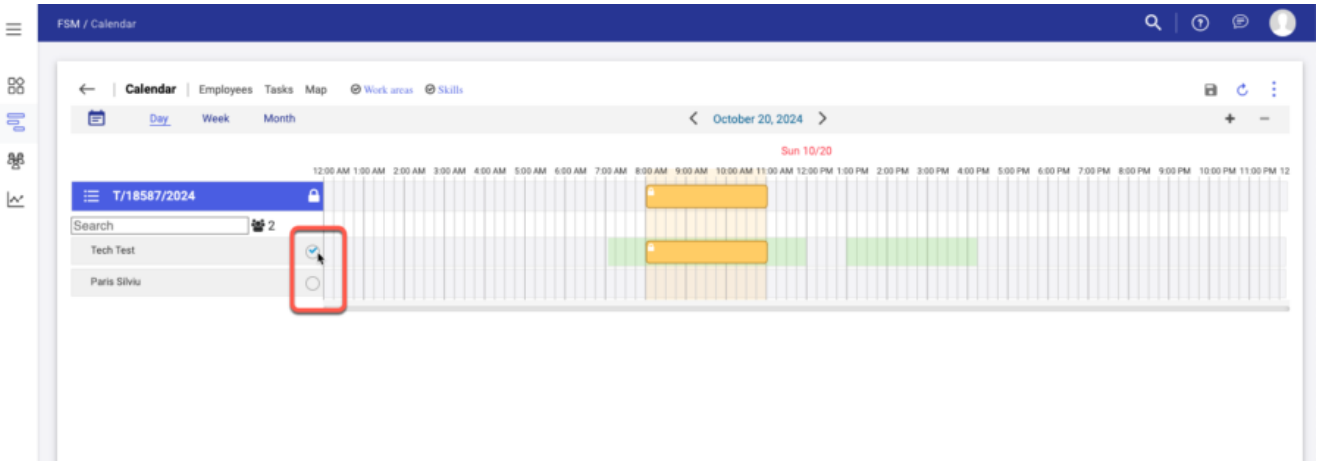
When the work order time frame and technician's available working time (green bar) are inserted, we can now assign the technician to the work order.



Click the checkbox, to the right of the Technician's name to assign the Technician.

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Unassign Tasks



To unassign a Technician from the Task, you simply uncheck the box next to the technician.

This will completely remove the technician from the order.

Once you unselect the box it will unassign the technician from the Task and then autosave the Task.

The Task can be assigned to a different technician.

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