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.

Table of Contents

- Schedule Task
- Assign Task
- <u>Unassign a Task</u>

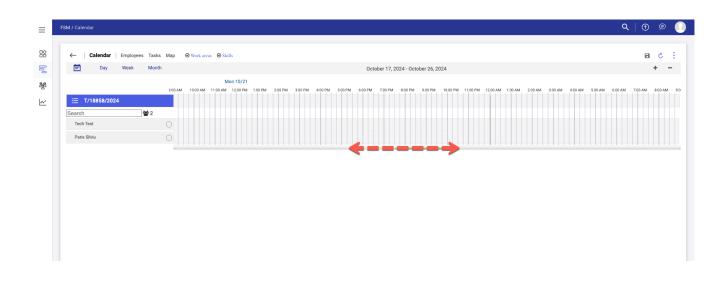
Schedule a Task

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

d / Browse tasks / Task detail	s (T/18858/2024)			ଦ୍
Task details: Task status Unschedu Basic data Customer				C Go to work order Cale
Basic data		Assignment details		
Task id Work order id Technology Work order type Task type	T/18854/2024 WO/18640/2024 Internet Customer Work Order Service Call	Organization unit Appointment slot Count of schedule changes 0 Count of time slot changes 0		
Priority	Low	Assign the task		
Location	Naperville 60565, 💡 849 Havenshire Rd	Contractors	(Select)	
Customer number AD supported Service regions	reinid_62904ef2-fb4e-46ff-80d6-60dc4821cae5	Date from	10/17/24,0538 PM Get slots Get time slots	to 10/24/24,04:53 PM
Earliest realization time	None	Notes		
SLA	10/24/24, (167:24) 4:53 PM	Content		
BEP External ID Status reason	5681b247-fe5c-5a9b-be36-6a7be5d85717 No value.	+ A	dd note	
Dealer ID Self Installing	200010131	System FSM - Inbound reactor api (ser Updated FSI with service activation co	vice-account-fsm-api-ga), 10/17/24, 4:53 PM de.	
Sales channel	US_RESIDENTIAL_FFL		vice-account-fsm-api-ga), 10/17/24, 4:53 PM	ief5-9987-bb11dbc8dd68

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

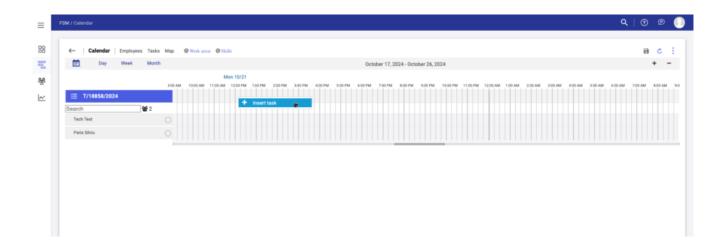
The Calendar window opens.



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.



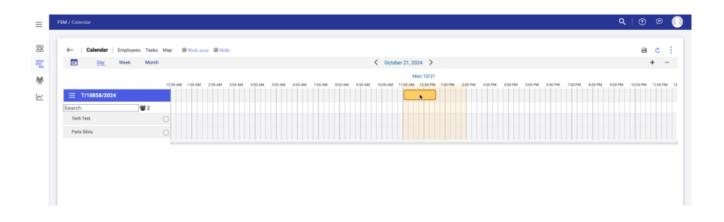
Click Ok.

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

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88				Mon 10/21				
<u>~</u>	⊞ T/18858/2024	12 00 AM 1	00 AM 200 AM 200 AM 600 AM 500 AM 60	0.00 700.00 E00.00 100.00 100.00 1200.00	100 PM 2:00 PM 2:00 PM 4:00 PM 5:00 PM 5:00 PM 7:00 PM 8:00 PM 9:00	PM 10:00 PM	11.00 PM	12
_	Search	2						
	Tech Test			Create slot configuration ×				
	Paris Silviu			There is no free slot configuration for task T/18858/2024.				
				Create new one				
				Slot name				
				me vay -				
				Organization unit				
				Organization unit Corporate Office				
				Cancel Create				

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

Top of page

Assign Tasks

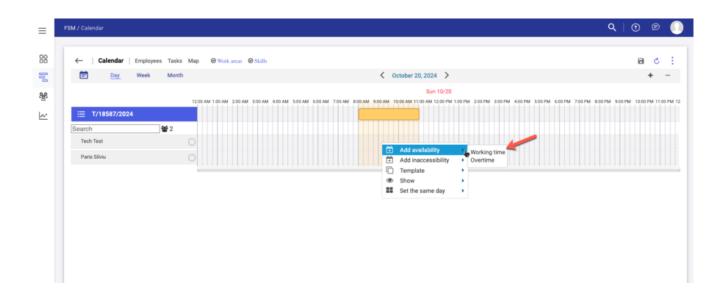
To assign a task, open the Calendar view of the task.

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**.

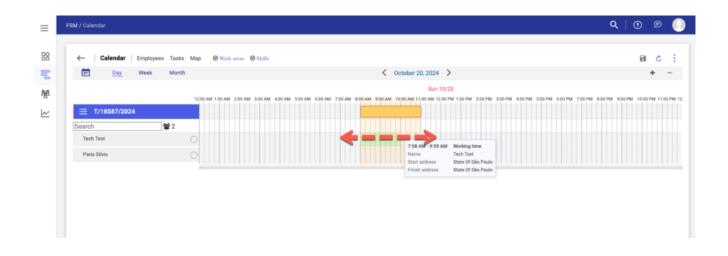
	Employees Tasks		fork areas	Skills															8	C
🖬 Day	Week Month							< (October 20, 202	24 >									+	-
	_	12:00 AM 1:00	AM 2:00 AM	2:00 AM 4:00 /	M 500 AM	6:00 AM 7:	OD AM	9 00 854		un 10/20	1:00 PM 2:	00 PM 3:00	PM 4:00 P	4 5:00 PM	6:00 PM	7:00 PM	8:00 PM	9:00 PM	10:00 PM	11:00 /
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The Technician must have a working time setup to assign the Task.



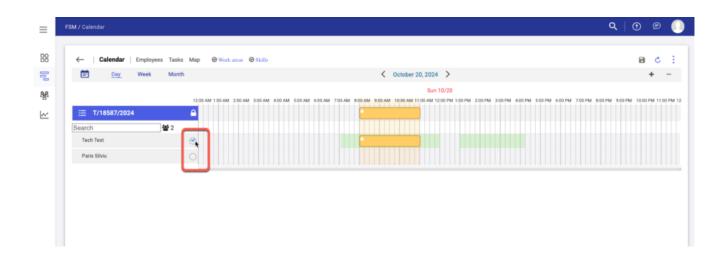
Right-click on the Technician row of the calendar. Hover over Add Availability and select Working time.

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.

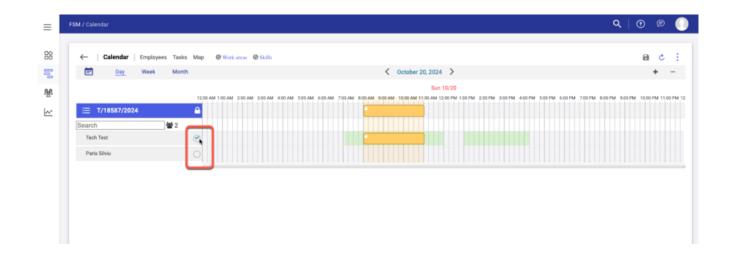
When the work order time frame and technician's available working time (green bar) are inserted, we can now assign the technician to the work order.



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

Top of page

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.

Top of page