FSMv5: Schedule, assign, & unassign a Task

Summary
Audience: Dispatchers, Admin Support

This Job Aid is for all FSM dispatch 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.

Select **Get slots** button.

The Choose timeslot window opens.

Select the Change appointment button to select the open date
and time slot for the appointment.

You can see additional open timeslots by selecting the numbers
or arrows at the bottom of the window.

The Task is now in the **Unassigned, Task status.** Verify the
Appointment slot.

Now we can assign the Task to a Technician.

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Assign Tasks

To assign a task, click on the **Calendar** button in the top left corner.
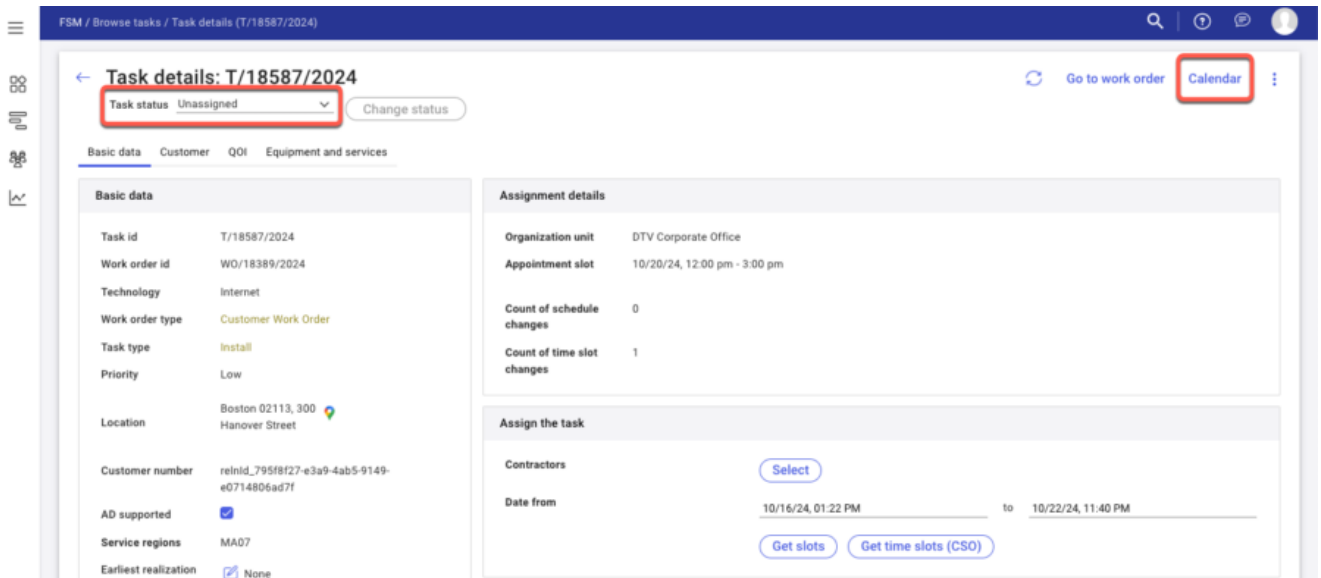
The Calendar window opens. The **Appointment slot** is displayed in yellow in the Task id row.

Note: You can return to the **Task details** page by clicking the **Task id**.
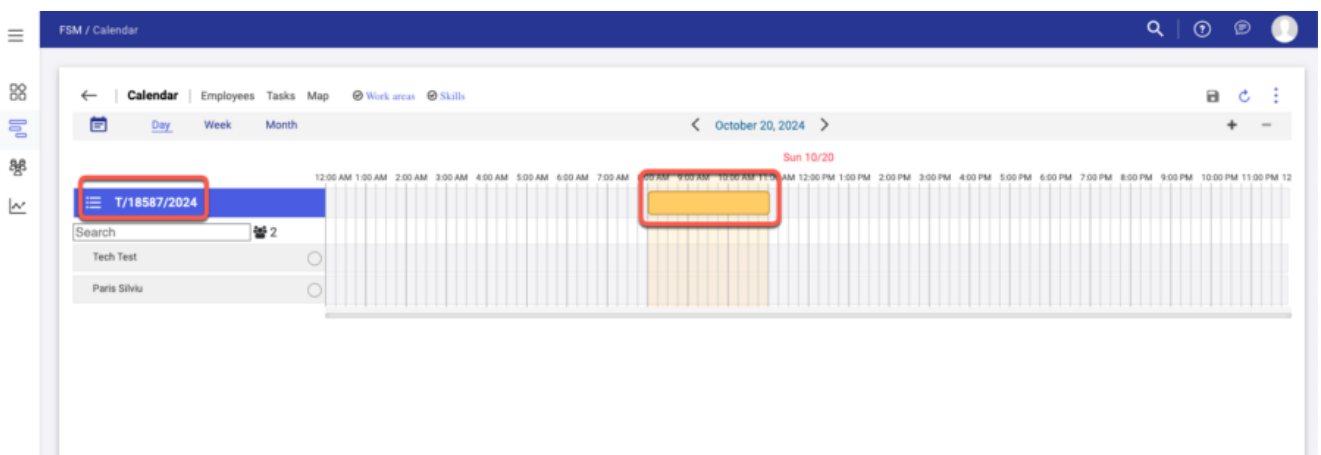
The Technician must have a working time setup to assign the

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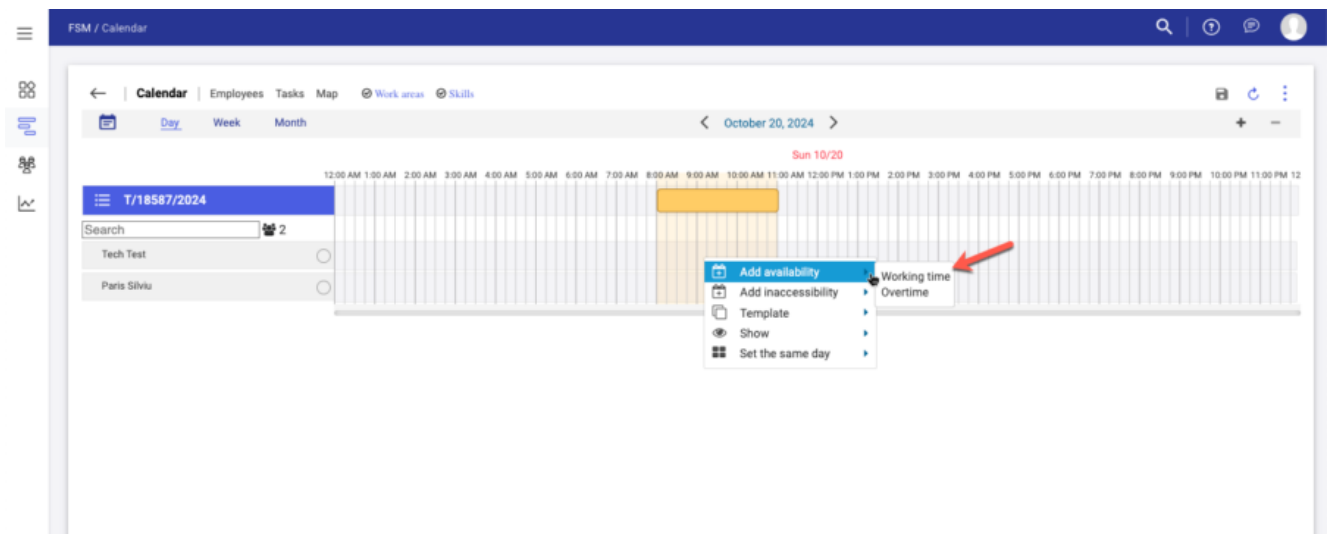
Right-click on the Technician row of the calendar. Hover over
Add Availability and select **Working time**.

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.

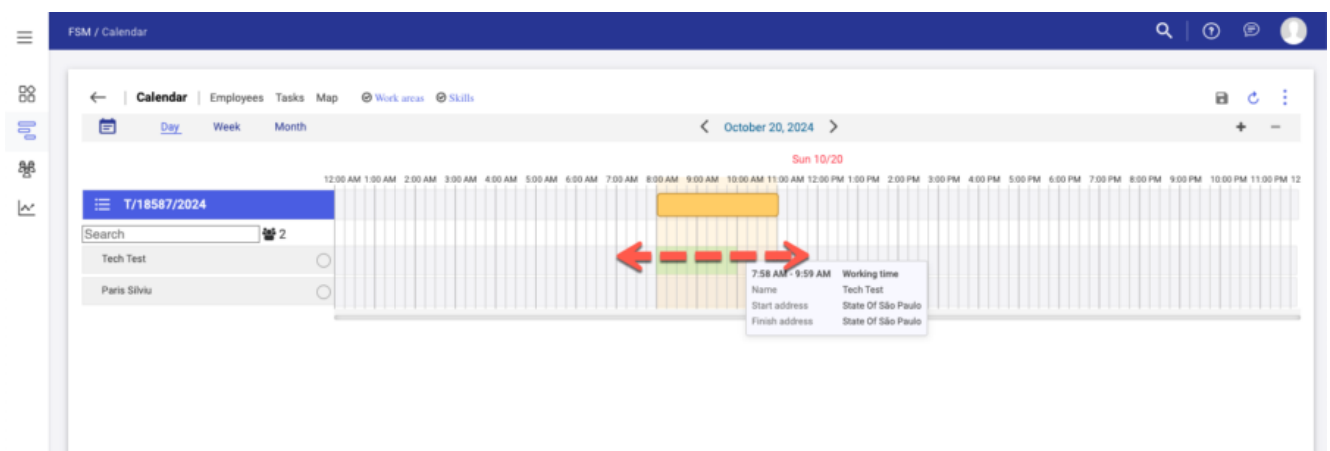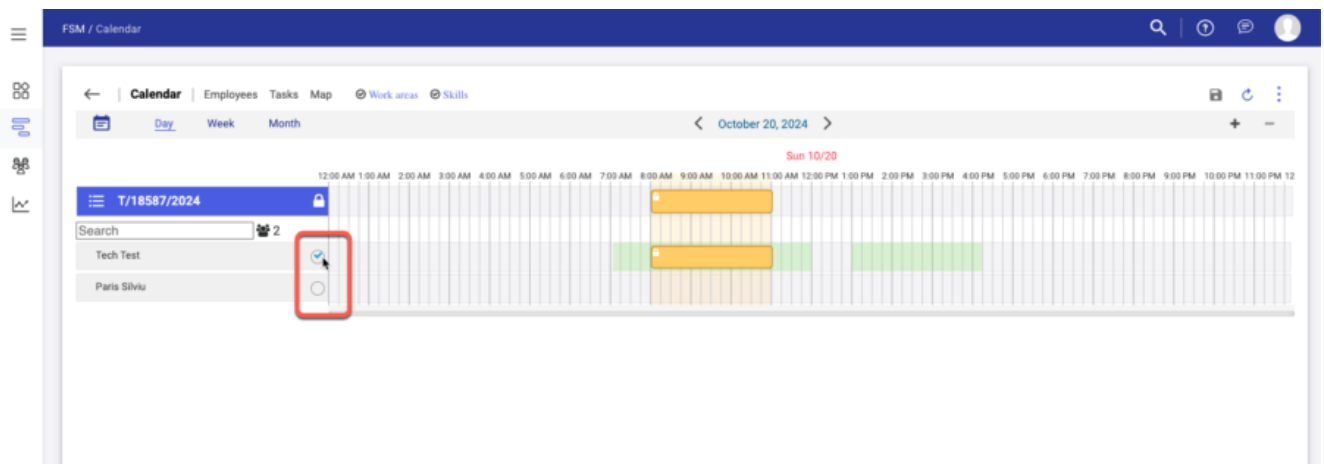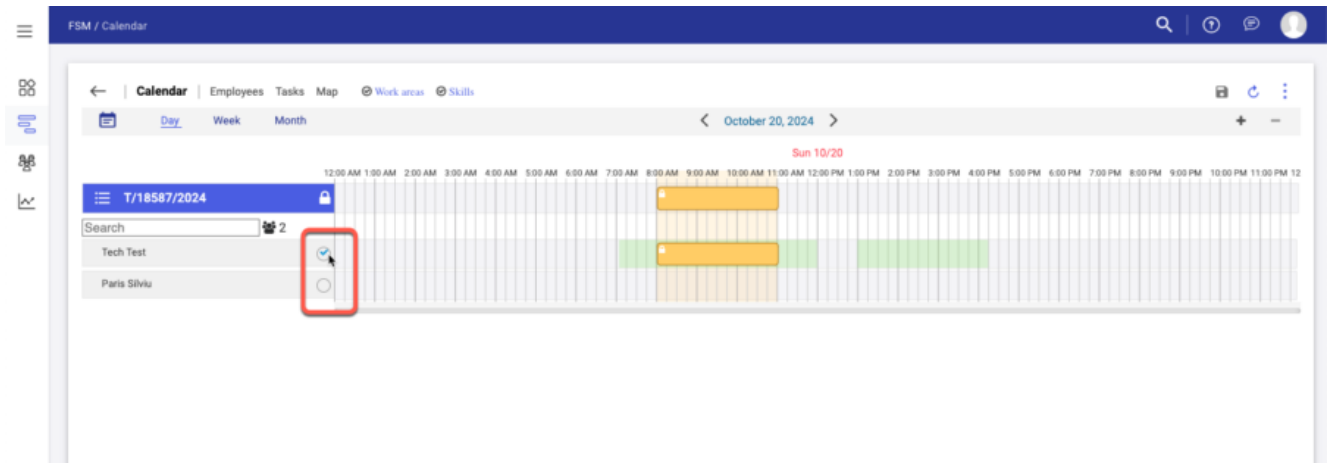When the work order time frame and technician's available working time (green bar) are inserted, we can now assign the technician to the work order.

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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