

Identifying Unassigned Orders in FSM Job Aid

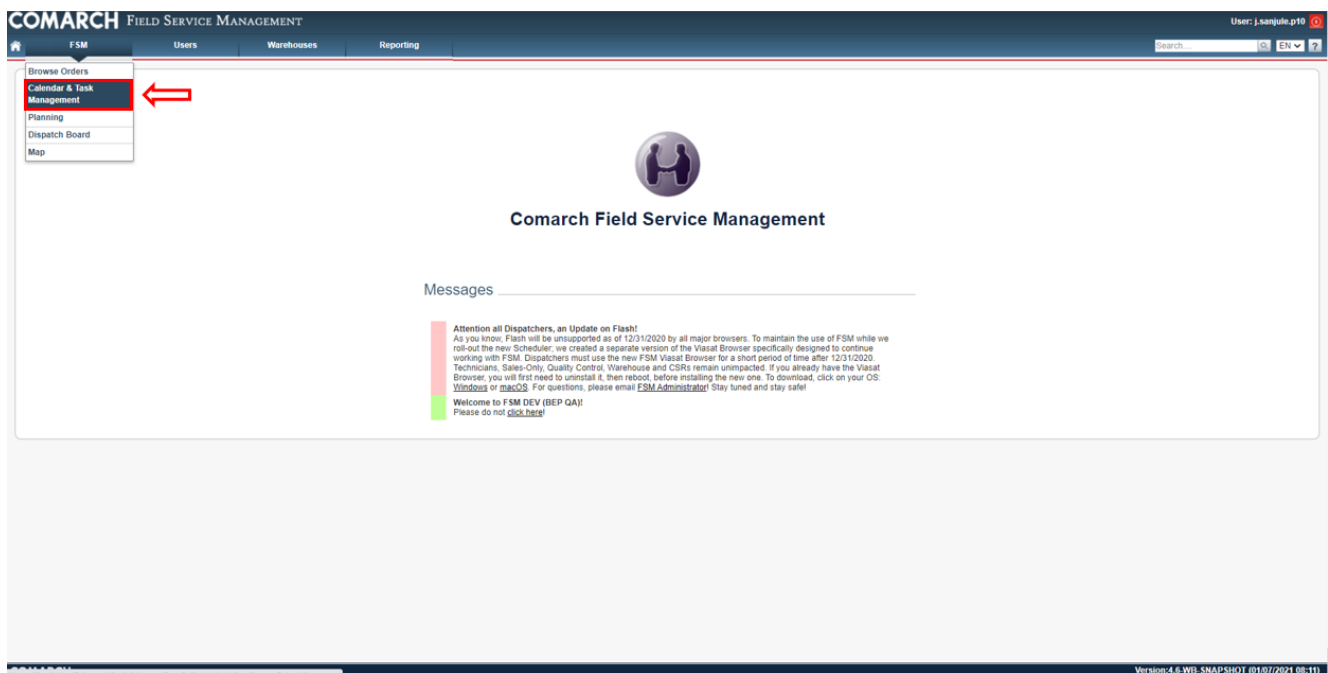
Unassigned Orders Button

Unassigned Orders is a quick link that dispatchers can use to pull up all work orders currently with no technician assigned.

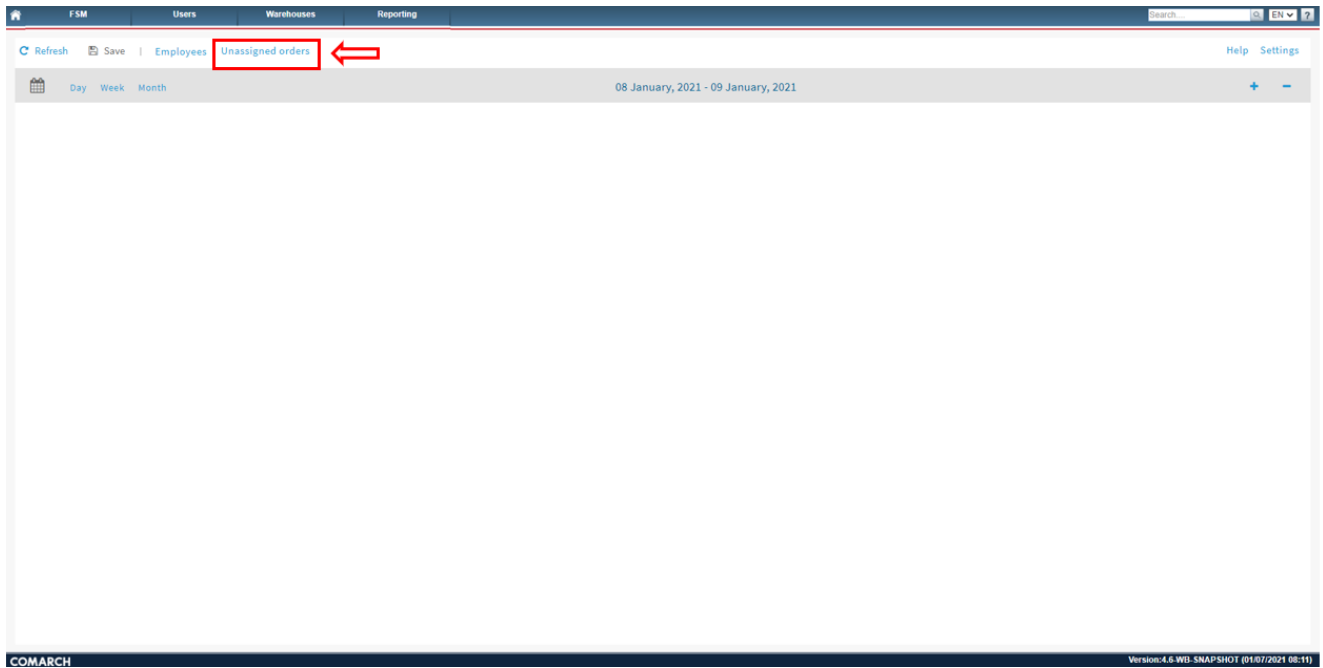
This link will allow dispatchers to quickly identify what work orders need to be assigned.

Hover over the **FSM Button**

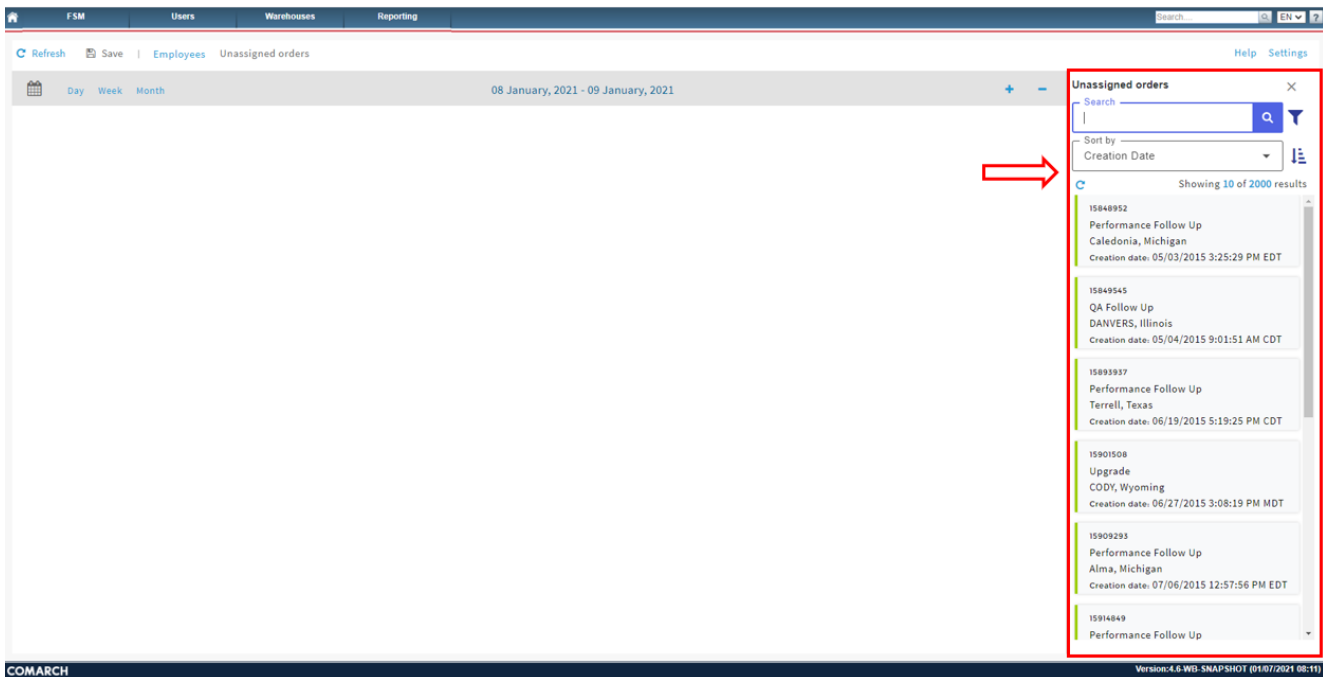
Highlight **Calendar & Task Management** and click **select**:



Click **Unassigned Orders**:



The Unassigned orders pop-up will appear on the right. This list will default to display oldest work orders to newest work orders:



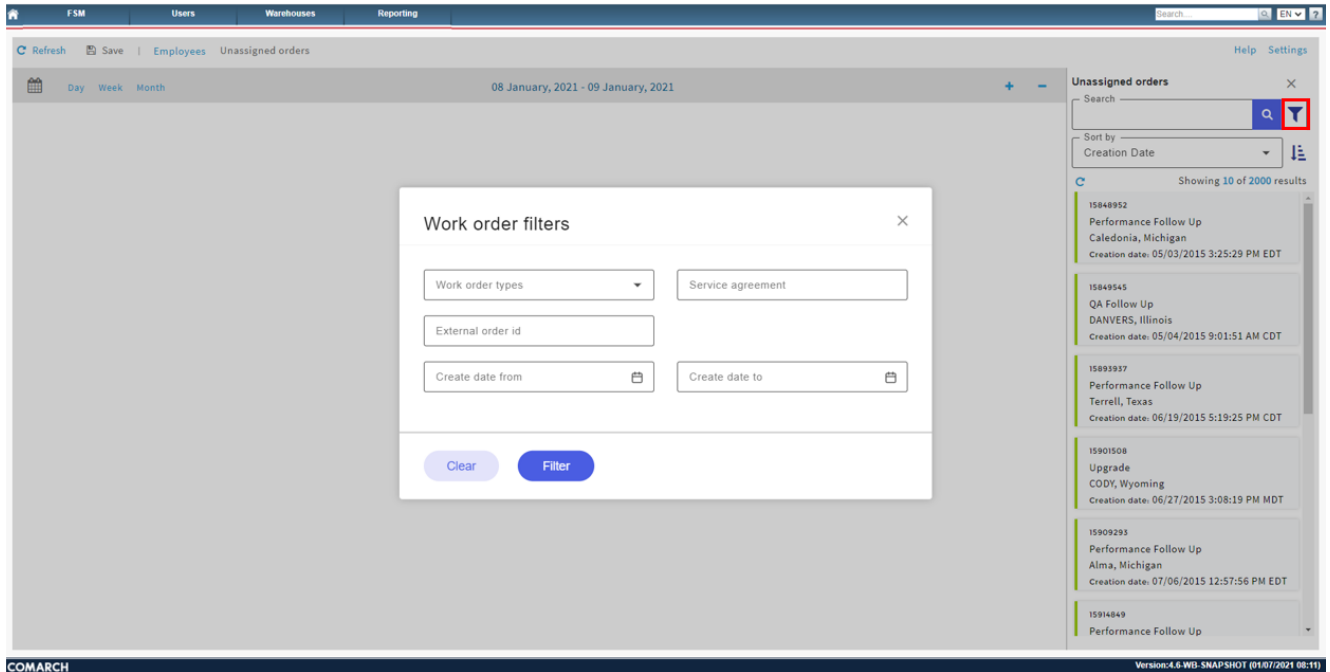
The Search feature can be used to manually search by FSM ID.

Next to the search button there is the **Work order filters** button. This filter will allow the user to customize the search results for Unassigned orders.

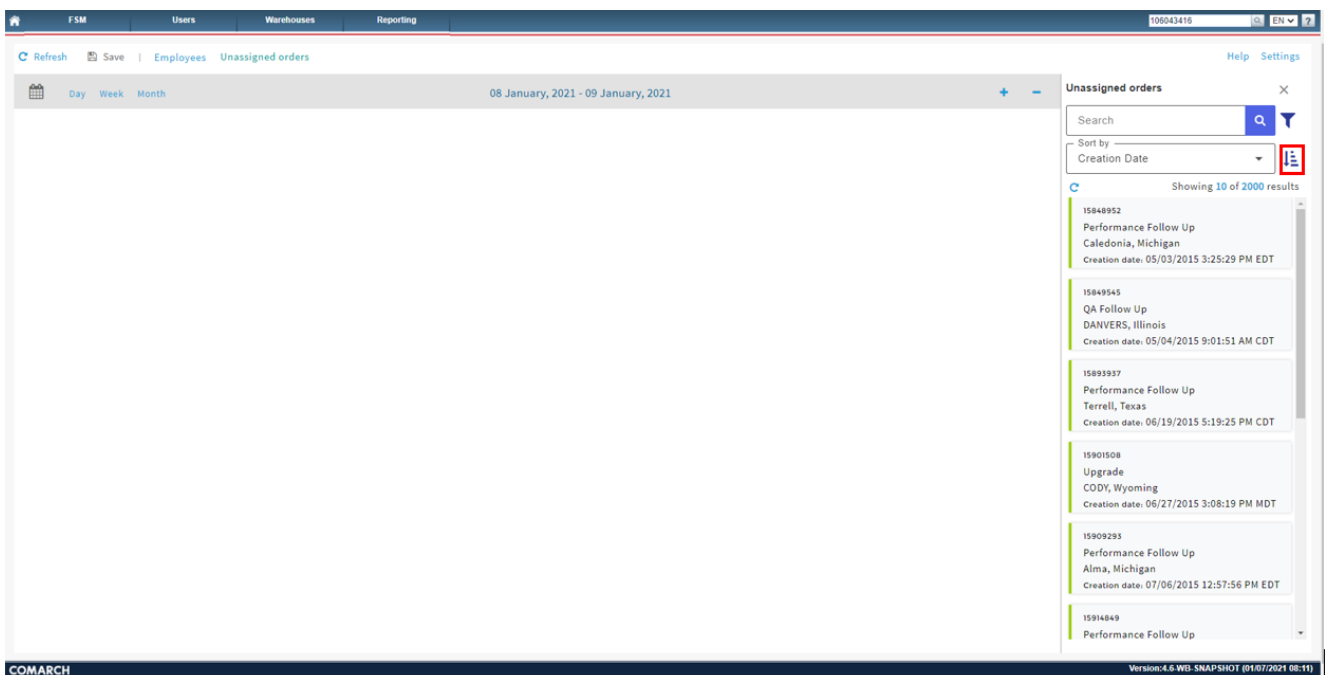
Work order type filter can be used to search for specific work

order types.

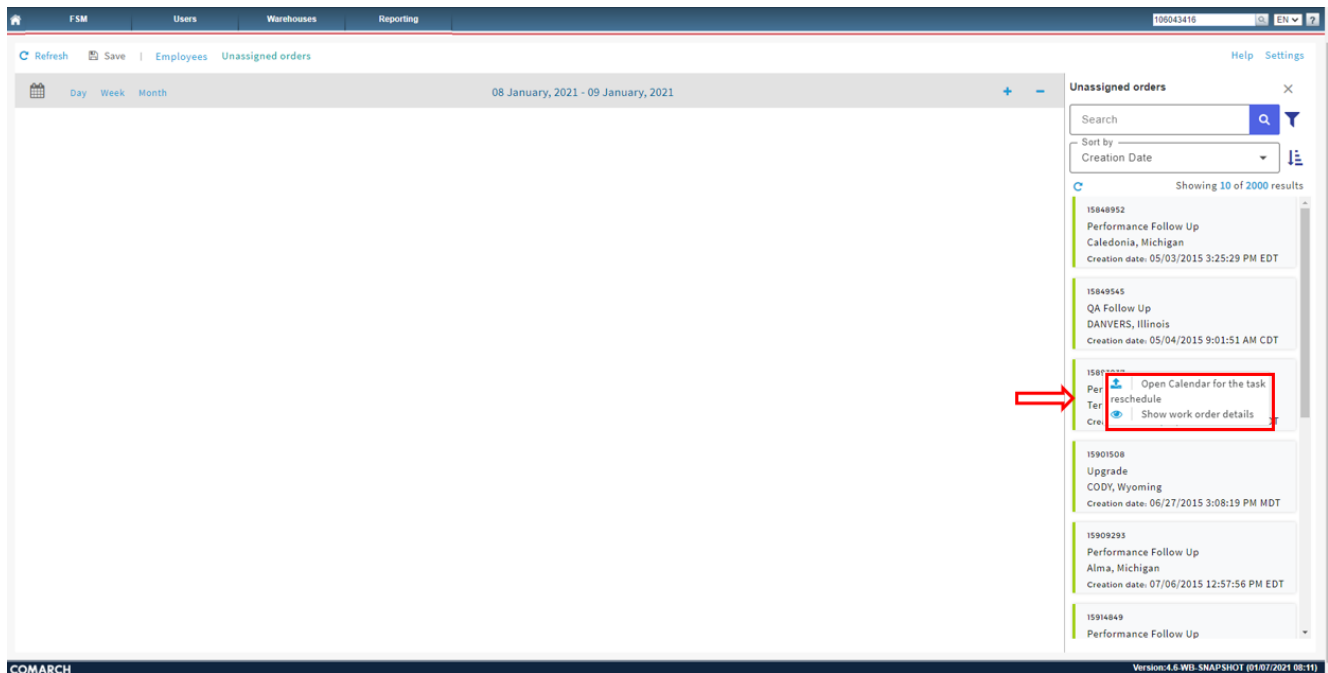
The **Create date from/Create date to** fields can allow the search to only display work orders within the given time range.



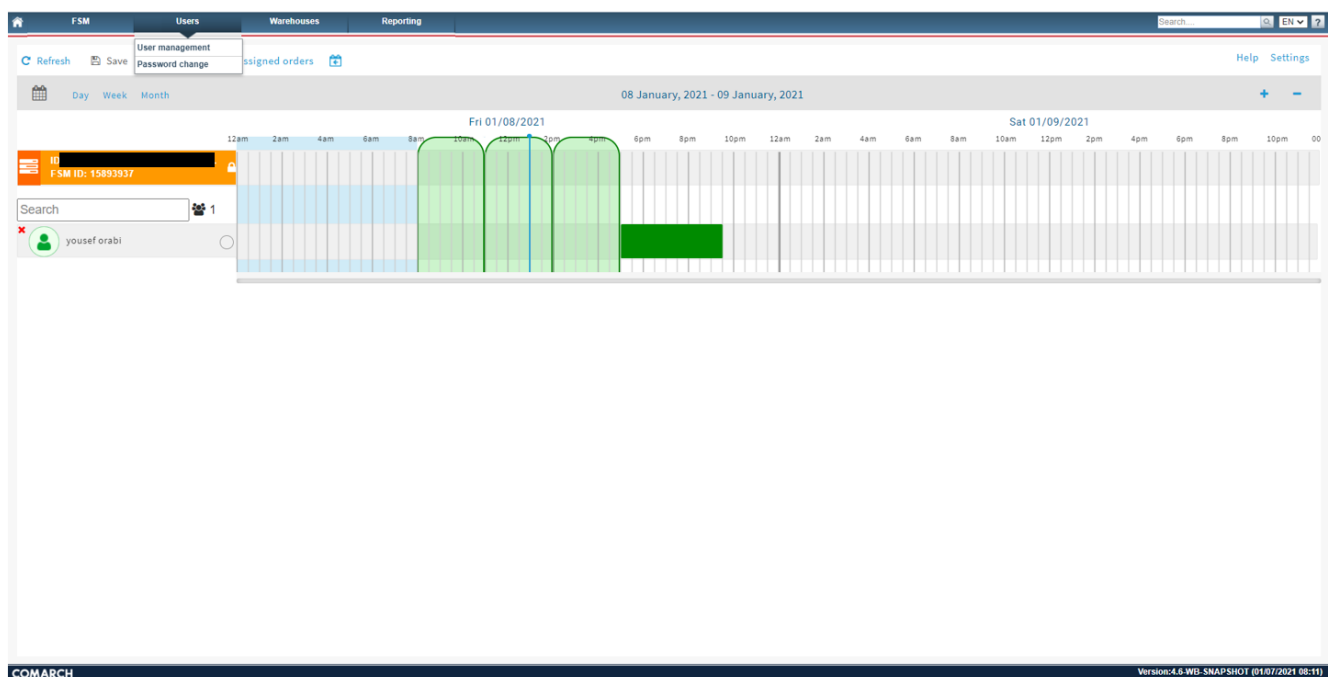
The **Sort by** drop down will allow the user to sort by Creation Date or FSM ID. The Default setting will display Oldest work orders to newest. This can be switched to display Newest Work orders to oldest using the icon next to the Sort by dropdown:



If you right click on an order it will display two options: **Open Calendar for task reschedule** and **Show work order details**:



If you select **Open Calendar for the task reschedule**, then the specific work order will pull up in scheduling. The dispatcher can now manually schedule this work order.



If you select **Show work order details**, then a new tab will open showing the work order details page:

COMARCH FIELD SERVICE MANAGEMENT User: j.sanjole.p10

FSM Users Warehouses Reporting

Order details

Details Installer information QOI Audit Additional information History

Basic data

FSM ID: 15893937
 External order id: [REDACTED]
 BEP external order id: [REDACTED]
 Type: Performance Follow Up
 Account #: 401598518
 Service Agreement #: 401598518
 Status: Unscheduled Change status

Dealer ID: [REDACTED]
 Create date: 06/19/2015 05:19:25 PM CDT
 Completion Date:
 Cancel Date:
 Cancel reason:
 Office phone number:

Current Service Ordered

Type	Service Name	Sequence	Status	Create Date	Entered By	Sold By	Product ID
No records found.							

Services Upon Completion

Type	Service Name	Sequence	Status	Create Date	Completion Date	Cancel Date	Entered By	Sold By	Product ID
No records found.									

Current Product Ordered

Type	Product Name	Status	Create Date	Label	Entered By	Sold By	Serial Number	Product ID
No records found.								

Products Upon Completion

Type	Product Name	Status	Create Date	Label	Entered By	Sold By	Serial Number	Product ID
No records found.								

Customer/Location information

Scheduling (flash)

Scheduled date:
 Reschedule reason:
 Total reschedules: 1
 Negative reschedules: 0
 Broken reschedules: 4

Date: 01/09/2021
 Available slots: Select...
 Reschedule reason: Select...

Unassigned Orders – Assign orders using the Drag and drop feature.

This feature will only work under the Calendar & Task Management dropdown.

Select the **Employees Button** and **Unassigned Orders**:

FSM Users Warehouses Reporting

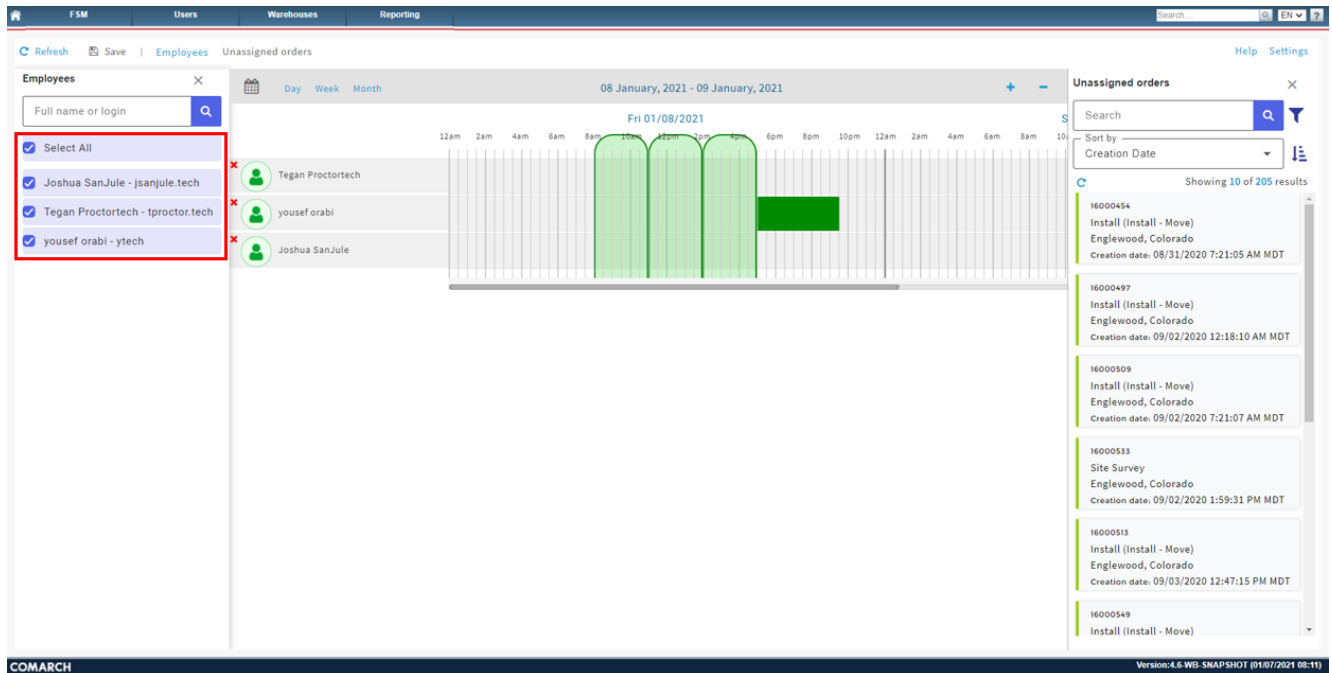
Refresh Save Employees Unassigned orders Help Settings

Day Week Month 08 January, 2021 - 09 January, 2021

COMARCH Version: 4.6-WB-SNAPSHOT (01/07/2021 08:11)

Select the desired employees that you wish to display.

The employees selected will display in the scheduling screen:

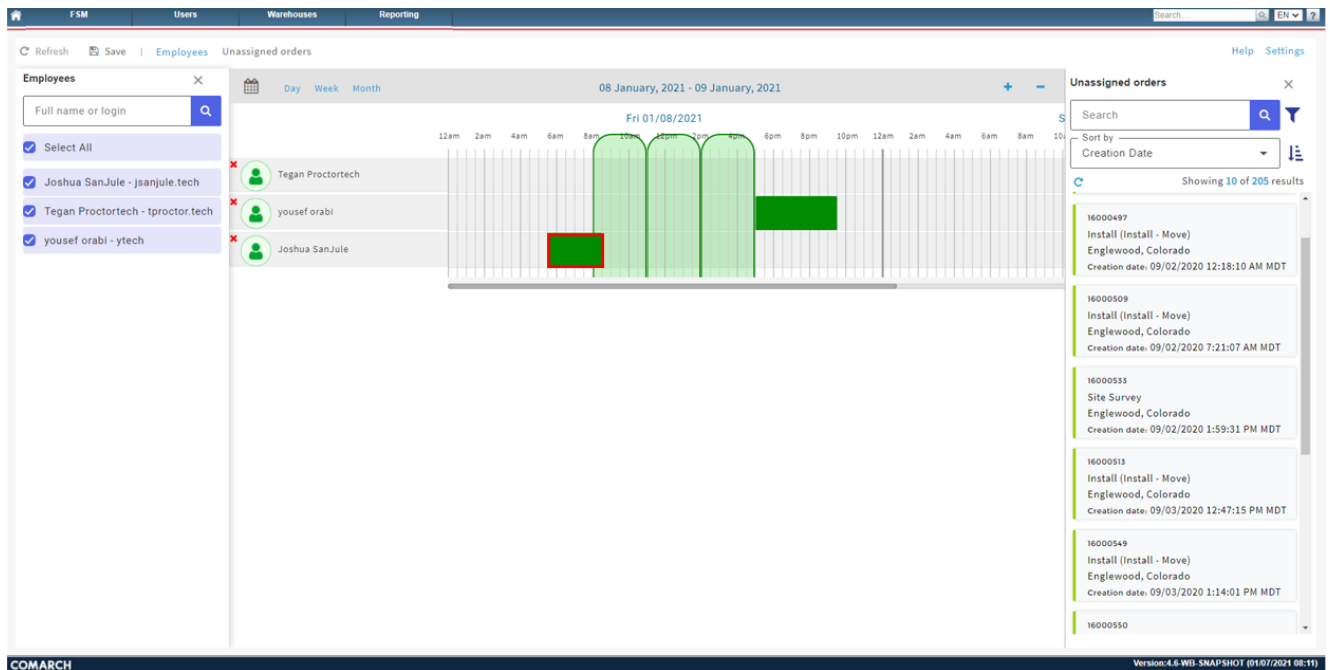


The Drag and Drop feature will allow the user to click on a work order from the Unassigned orders list and then drag the order to the technician's available work time (Dark green bar).

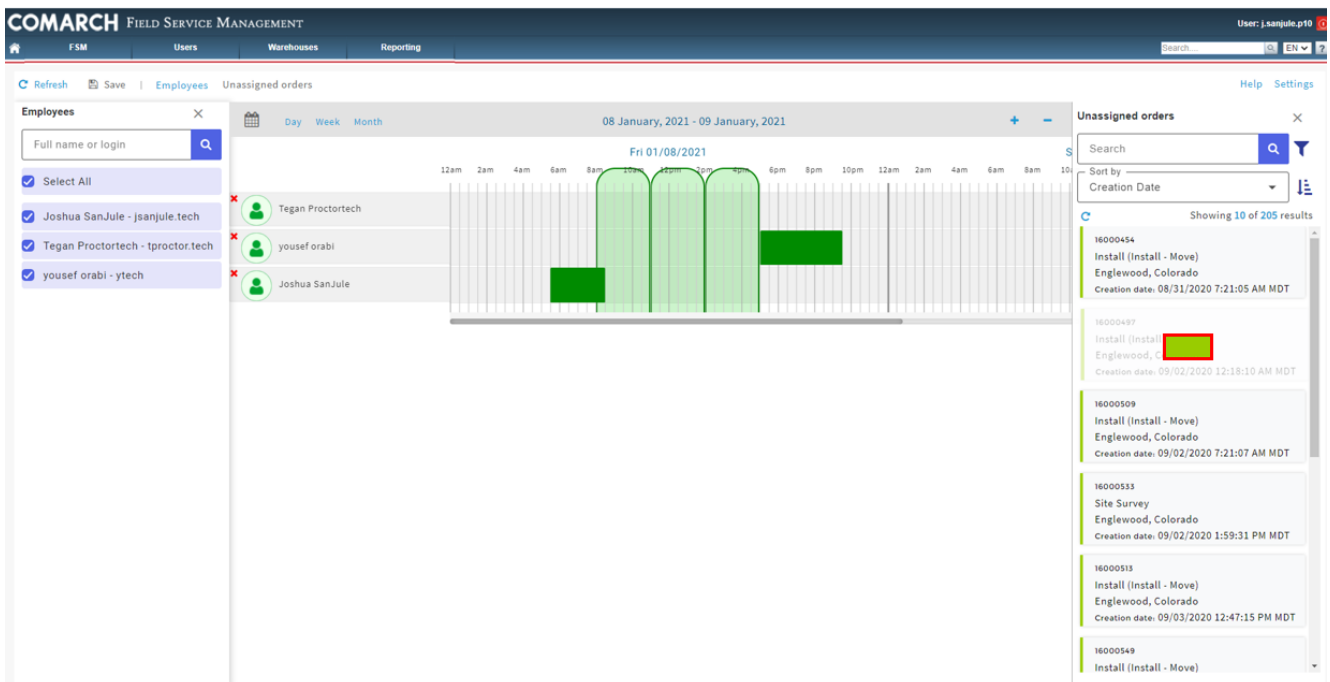
To Add work time to the desired technician:

1. Right click in the same row as the technician's name under the desired date & time
2. Hove over Add availability
3. Select work time.
4. Drag the Dark Green Bar in either direction to extend available work times.

The technician's work time inserted:




Left click on the work order and hold down the left click button. While holding the left click button down you will see a Light Green Bar:




Drag the Light Green Bar over to inside the Dark Green Bar:

The screenshot shows the COMARCH Field Service Management interface. On the left, the 'Employees' panel lists three users: Tegan Proctortech, yousef orabi, and Joshua SanJule. In the center, a calendar view for Friday, 01/08/2021, shows a dark green bar for Tegan Proctortech and a light green bar for yousef orabi. On the right, the 'Unassigned orders' panel shows a list of orders. A red arrow points from a light green bar in the 'Unassigned orders' list to a dark green bar in the 'Employees' panel, indicating the correct alignment for assigning a work order.

The Light Green Bar will need to be inside the Dark Green Bar.

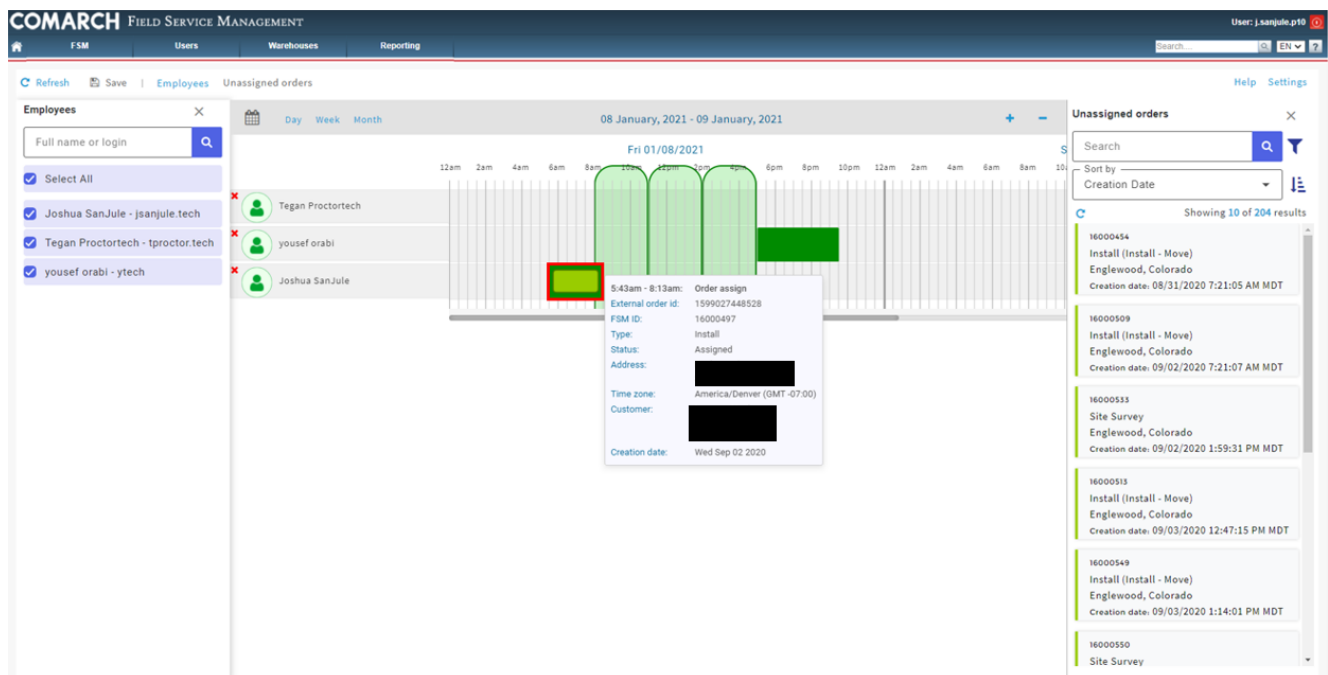
When lined up correctly a hand icon will appear  . If not

lined up correctly the no symbol  will appear.

The screenshot shows the COMARCH Field Service Management interface. On the left, the 'Employees' panel lists three users: Tegan Proctortech, yousef orabi, and Joshua SanJule. In the center, a calendar view for Friday, 01/08/2021, shows a dark green bar for Tegan Proctortech and a light green bar for yousef orabi. On the right, the 'Unassigned orders' panel shows a list of orders. A red box highlights a light green bar in the 'Unassigned orders' list, indicating it is not correctly aligned with a dark green bar in the 'Employees' panel.

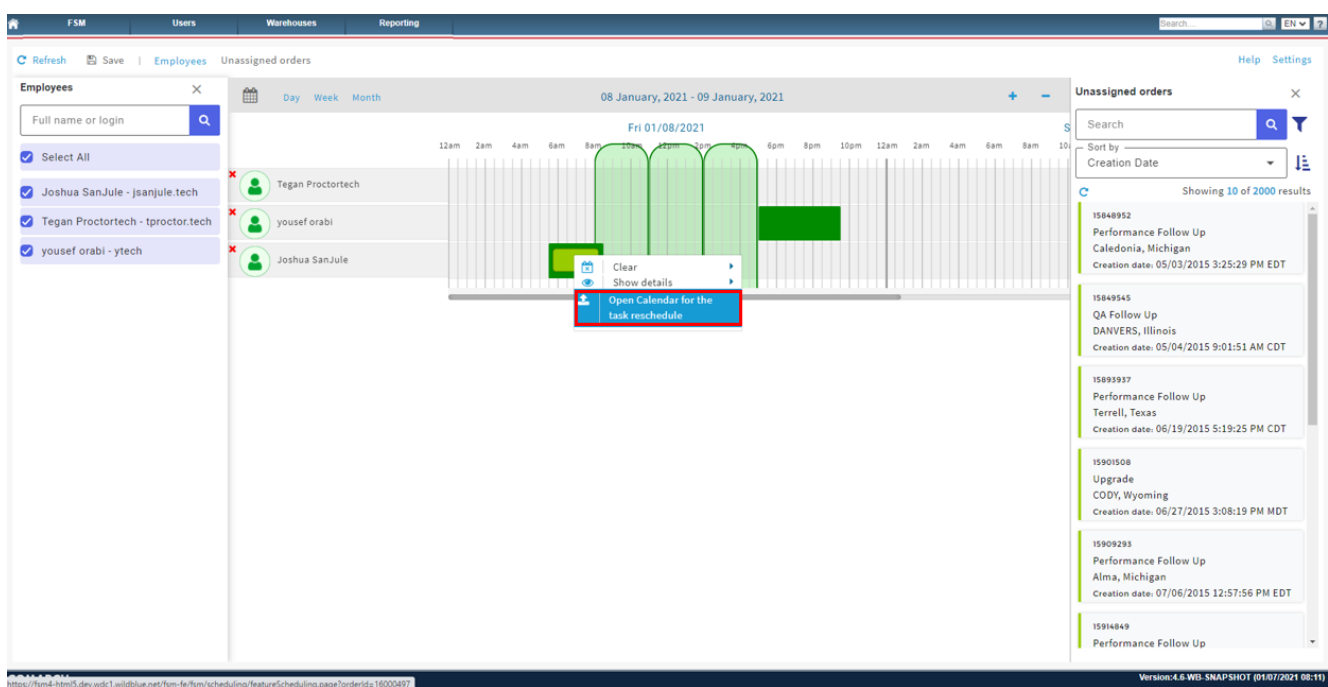
Once lined up correctly let go of the left click button. The work order will now be assigned and will auto save. If you hover over the Light Green Bar it will show assigned and will no longer be in the Unassigned orders list. Also note that if

you let go of the left click button while seeing the no symbol no changes will be made.



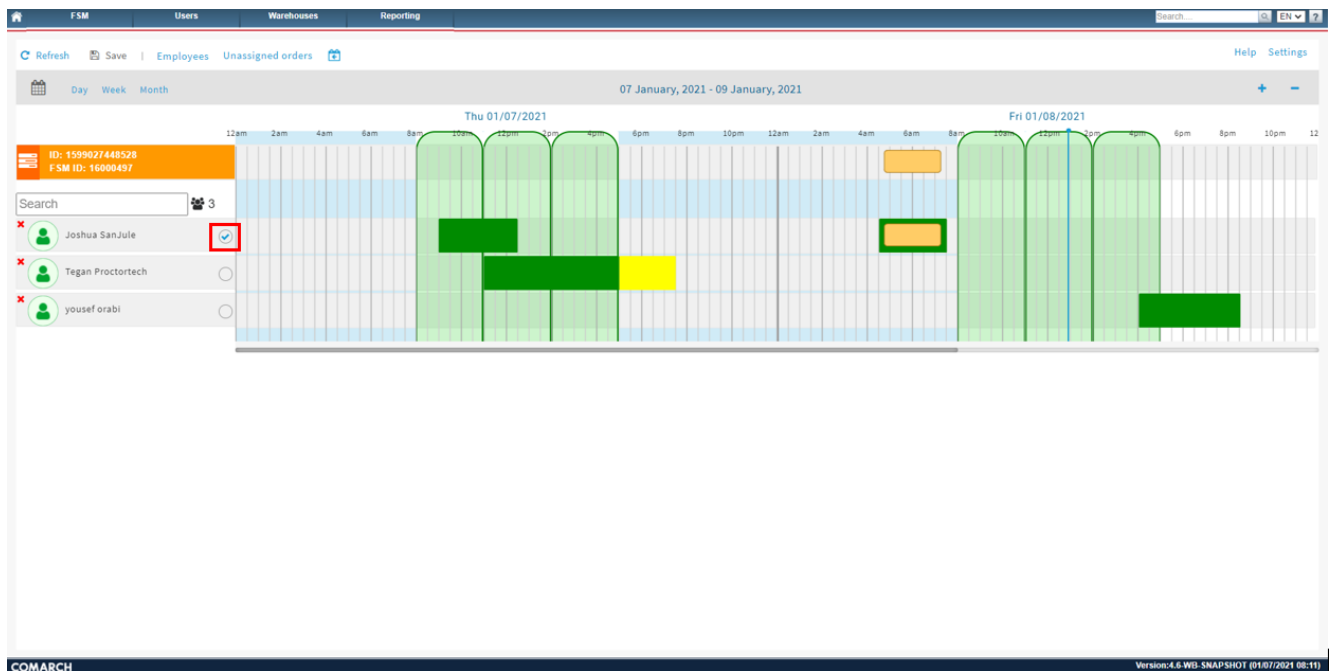
To Unassign a tech while under the Calendar & Task Management dropdown

Right click Light Green Bar and Select **Open Calendar** for the task reschedule:

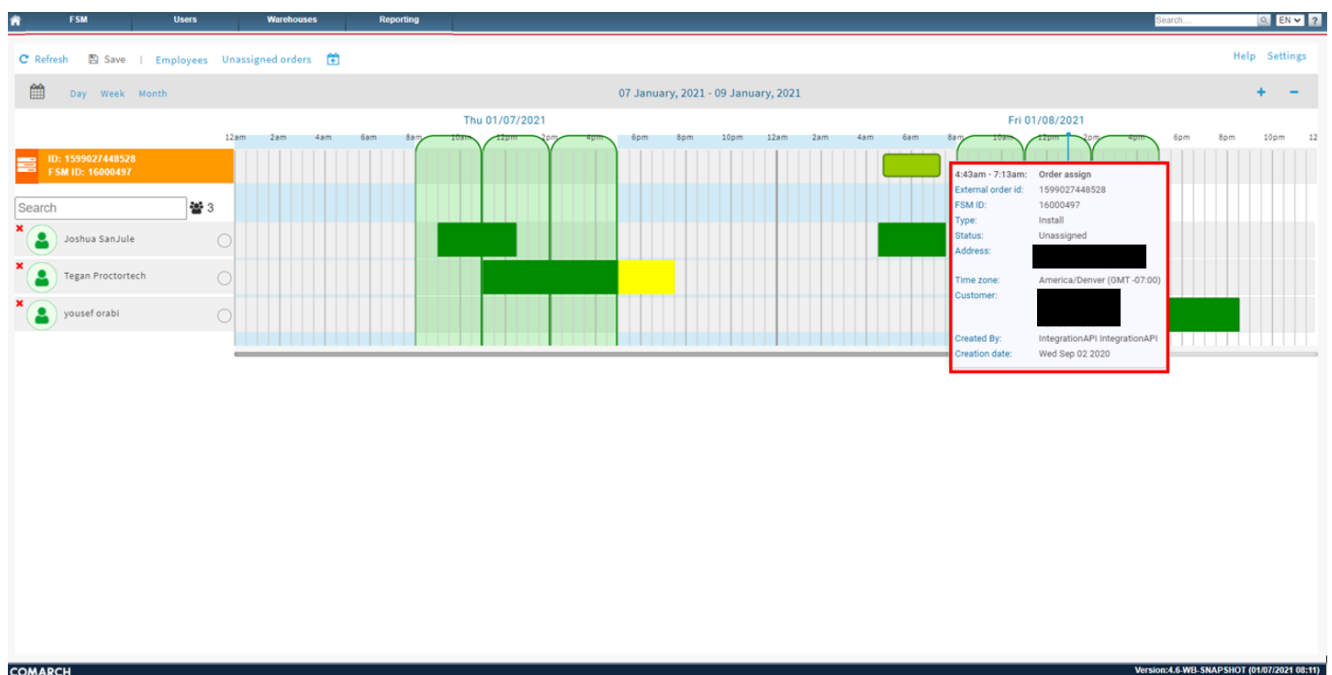


This will pull up that specific work order.

To Unassign the technician, uncheck the checkbox next to the technician's name:

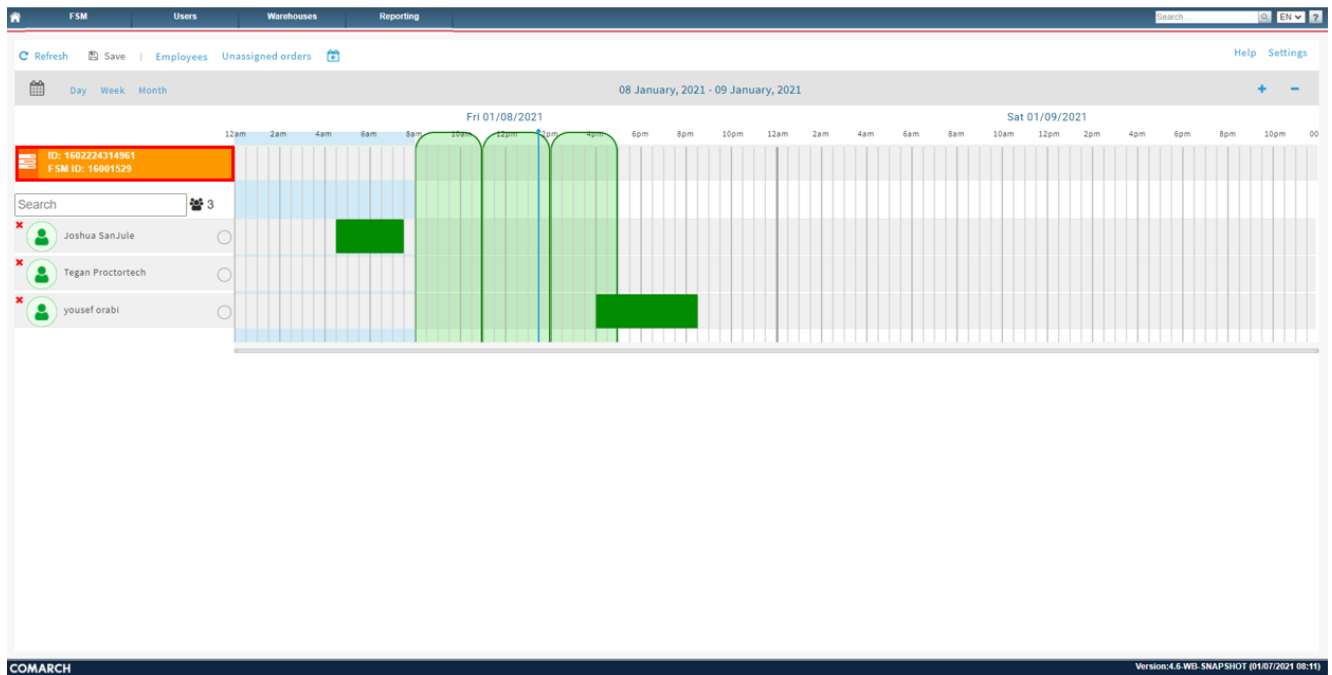


This will unassign the work order and auto save:

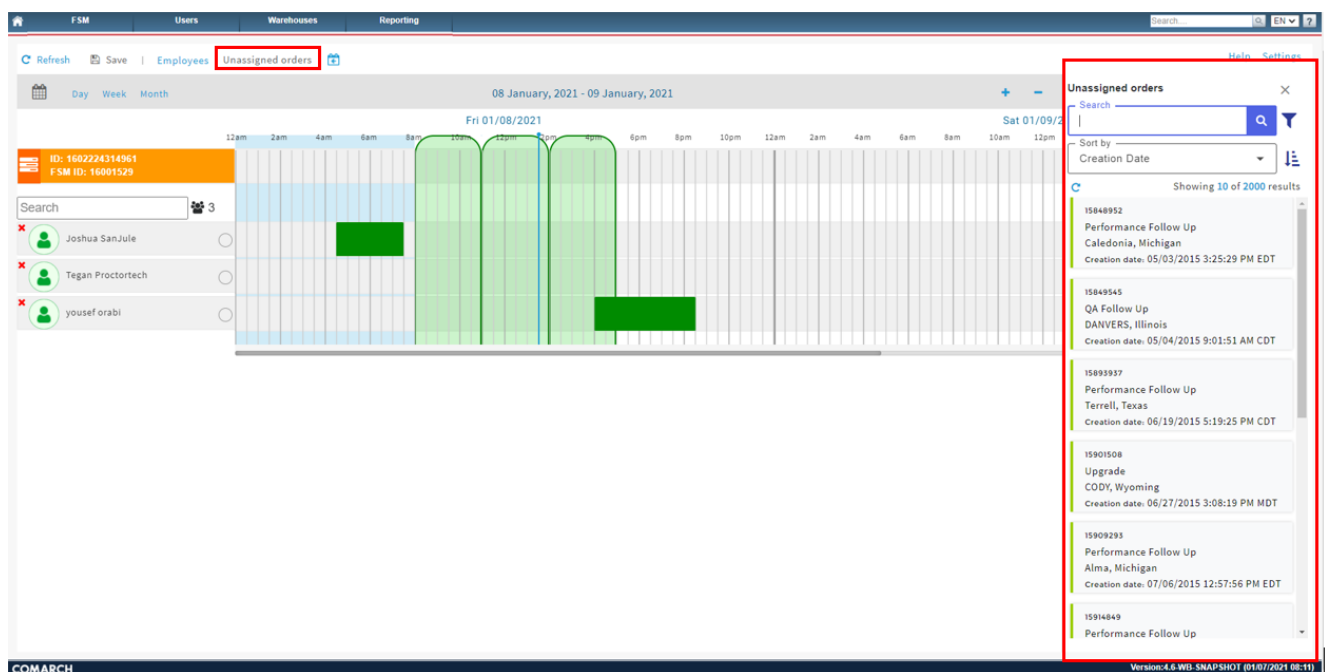


Unassigned Orders via the Scheduling Button

Using the **schedule** button will pull up that specific order. When on a specific order the FSM ID will be displayed:



When on a specific order, the user will still have access to the unassigned order button:



When viewing a specific order, the Drag and Drop feature will not work. That feature will only work under the Calendar & Task Management.

When under a specific order, the unassigned order button can be used as a quick way to view Unassigned Orders. Right clicking on an order under the Unassigned orders list will

give the option to Open Calendar for the task reschedule. The dispatcher can quickly move to another work order to manual schedule.