Identifying Unassigned Orders in FSM Job Aid

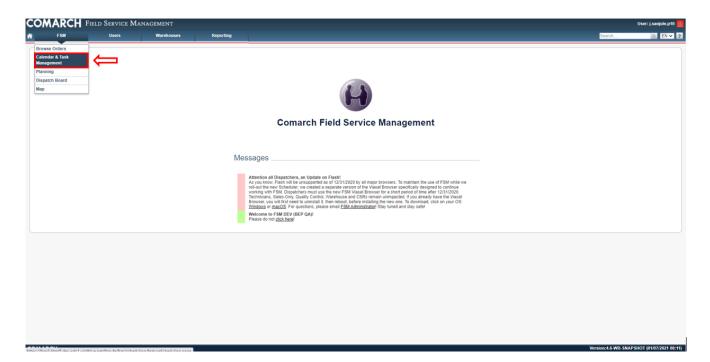
Unassigned Orders Button

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

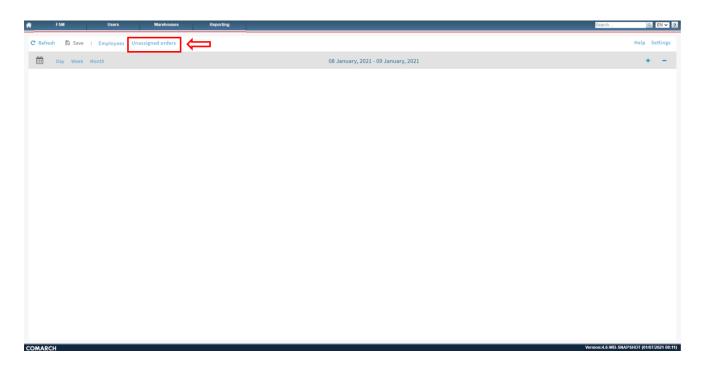
This link will allow dispatchers to quickly identify what work orders need to be assigned.

Hover over the FSM Button

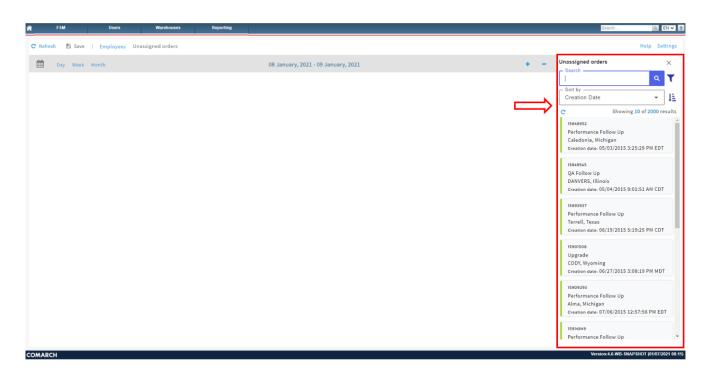
Highlight Calendar & Task Management and click select:



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.

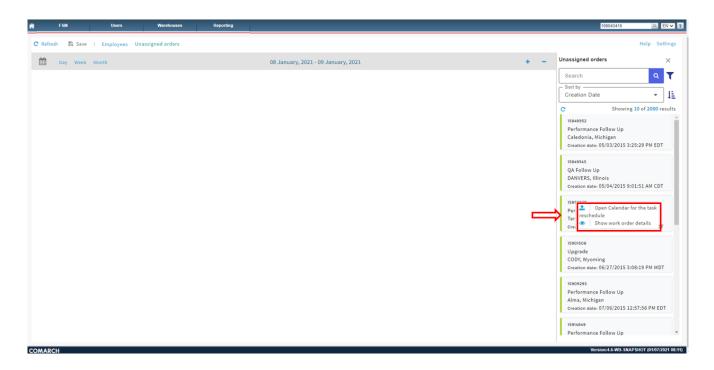
The **Create date from/Create date to** fields can allow the search to only display work orders within the given time range.

FSM Users Warehouses Rep	orting	Search Q. EN V 2
C Refresh 🖺 Save Employees Unassigned orders		Help Settings
Day Week Month	08 January, 2021 - 09 January, 2021	Unassigned orders Search Search Sort by
	Work order filters × Work order types • External order id • Create date from ●	Creation Date
	Clear Filter	19901508 Upgrade CODY, Wyoming Creation date: 06/27/2015 3:08:19 PM MDT 19909293 Performance Follow Up Alma, Michigan Creation date: 07/06/2015 12:57:56 PM EDT 1991449
CONADCH		Performance Follow Up

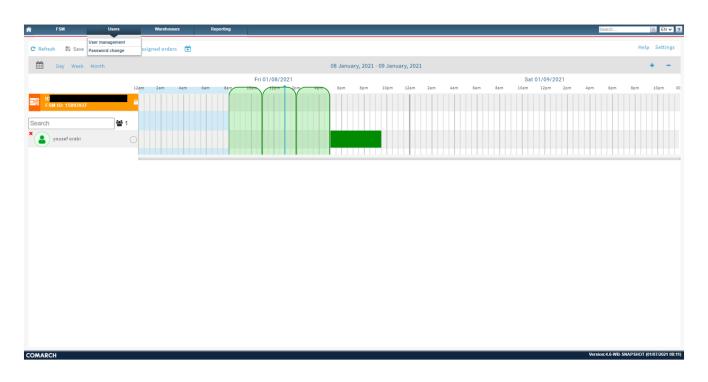
The **Sort by** drop down will allow the user to sort by Creation Date or FSM ID. The Default setting will display Oldest work orders to newest. This can be switched to display Newest Work orders to oldest using the icon next to the Sort by dropdown:

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		Sort by Creation Date
		Creation Date -
		C Showing 10 of 2000 re
		15848952
		Performance Follow Up Caledonia, Michigan
		Creation date: 05/03/2015 3:25:29 PM EDT
		15849545
		QA Follow Up
		DANVERS, Illinois
		Creation date: 05/04/2015 9:01:51 AM CDT
		15893937
		Performance Follow Up
		Terrell, Texas Creation date: 06/19/2015 5:19:25 PM CDT
		15901508
		Upgrade CODY, Wyoming
		Creation date: 06/27/2015 3:08:19 PM MDT
		15909293
		Performance Follow Up
		Alma, Michigan
		Creation date: 07/06/2015 12:57:56 PM ED
		15914849
		Performance Follow Up

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 Managem	ENT	User: į.sanjule.p10 🔇
FSM Users Wa	rehouses Reporting	Search 🤐 EN 🗸 💈
Order details	ilt Additional information History	Refresh Print Scheduling
Basic data FSM ID 15893937 External order id Type Type Performance Follow Up Account # 401598518 Status Unscheduled	✓ Change status ♀	Dealer ID 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 No records found.	Status Create Date Entered By Sold By Produ	Services Upon Completion Type Service Name Sequence Status Create Date Completion Date Cancel Date Entered By Sold By Product ID No records found. No records found.
Current Product Ordered		Products Upon Completion
Type Product Name Status Create Date No records found.	e Label Entered By Sold By Serial Number Prod	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 Parcifiue reschedules 1		Date 01/09/2021 Available slots Select

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

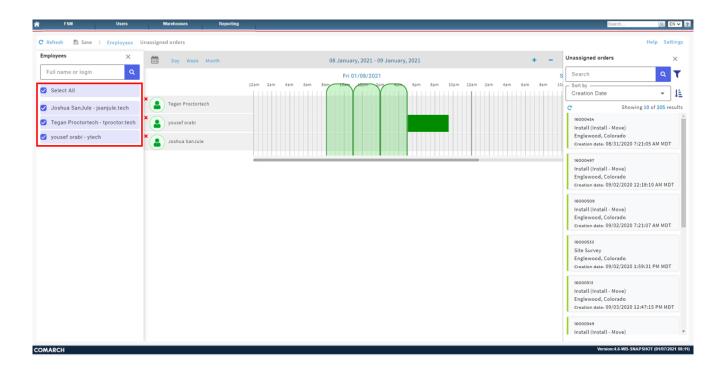
This feature will only work under the Calendar & Task Management dropdown.

Select the Employees Button and Unassigned Orders:

*	FSM	Users	Warehouses	Reporting				Search	Q EN ♥ ?
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m	Day Week	Month			08 .	January, 2021 - 09 January, 2021			+ -
COMARCI	н							Version:4.6-W	B-SNAPSHOT (01/07/2021 08:11)

Select the desired employees that you wish to display.

The employees selected will display in the scheduling screen:

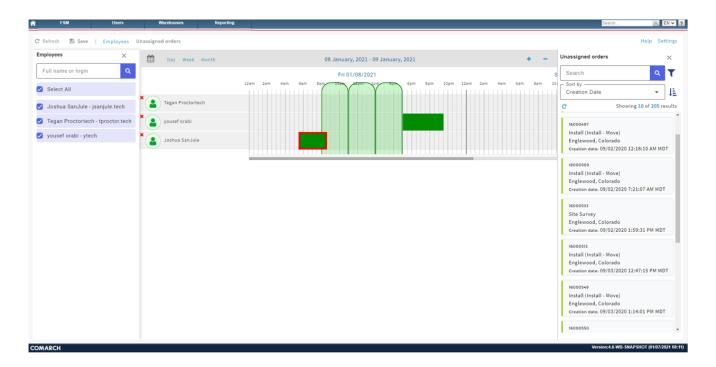


The Drag and Drop feature will allow the user to click on a work order from the Unassigned orders list and then drag the order to the technician's available work time (Dark green bar).

To Add work time to the desired technician:

- 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.

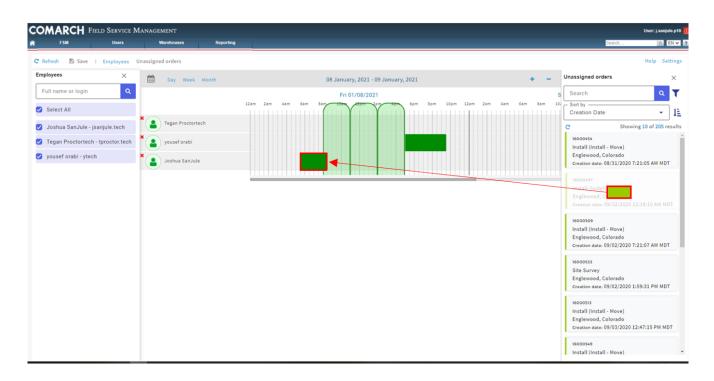
The technician's work time inserted:



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:

FSM Users	Warehouses Rep	xting	Search Q. EN
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Full name or login	۹	Fri 01/08/2021	s Search Q
Select All		12am 2am 4am 6am 8am 10am 10am 10am 10am 10am 10am 10am 10	am 2am 4am 6am 8am 10 Creation Date
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Tegan Proctortech - tproctor.te	ech × yousef orabi		16000454 Install (Install - Move)
yousef orabi - ytech	X Joshua SanJule		Englewood, Colorado Creation date: 08/31/2020 7:21:05 AM MDT
			16000497 Install (Instal Englewood, C Crestion date: 09/02/2020 12:18:10 AM MDT
			iscoosoe Install (Install - Move) Englewood, Colorado Creation date. 09/02/2020 7:21:07 AM MDT
			16000533 Site Survey Englewexed, Colorado Creation date, 09/02/2020 1:59:31 PM MDT
			iscoosis Install (Install - Move) Englewood, Colorado Creation date, 09/03/2020 12:47:15 PM MD1
			16000549 Install (Install - Move)

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



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.

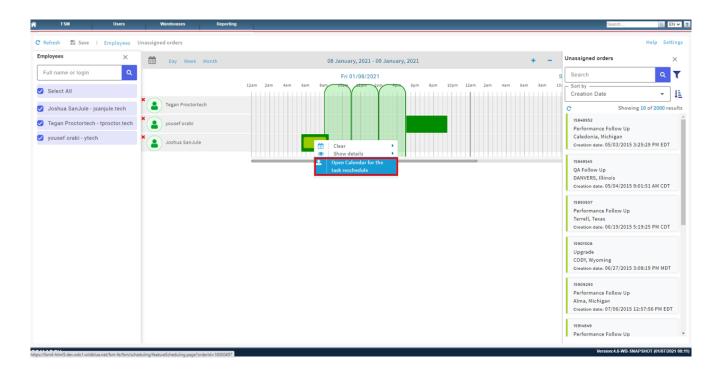
FSM Users	Warehouses Repor	ting	User: j.sanjule.pti Search
Refresh 🖺 Save Employees	Unassigned orders		Help Setting
mployees ×	Day Week Month	08 January, 2021 + -	Unassigned orders ×
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Select All		12am 2am 4am 6am 8am 10am 12pm 2pm 4pm 6pm 8pm 10pm 00:00	Sort by Creation Date
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yousef orabi - ytech	× Joshua SanJule		Englewood, Colorado Creation date: 08/31/2020 7:21:05 AM MDT
			16000497 Install (Install - Move) Englewood, Colorado Creation date: 09/02/2020 12:18:10 AM MDT
			16000509 Install (Install - Move) Englewood, Colorado Creation date: 09/02/2020 7:21:07 AM MDT
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			16000513 Install (Install - Move) Englewood, Colorado creation date. 09/03/2020 12:47:15 PM MDT
			16000549 Install (Install - Move)

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.

FSM Users	Warehouses Reporting			Search 9. EN
Refresh 🖺 Save Employees	Unassigned orders			Help Setti
mployees ×	Day Week Month	08 January, 2021 - 09 January,	, 2021 + -	Unassigned orders >
Full name or login		Fri 01/08/2021		s Search Q
Select All		12am 2am 4am 6am 8am 10am 12pm 2pm 4pm	6pm 8pm 10pm 12am 2am 4am 6am 8am	10 Sort by Creation Date
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Tegan Proctortech - tproctor.tech	× sousef orabi			16000454 Install (Install - Move)
yousef orabi - ytech	X Joshua SanJule	5:43am - 8:13am: Order assign External order id: 15990274485;		Englewood, Colorado Creation date: 08/31/2020 7:21:05 AM MDT
		External order id: 159902744852 FSM ID: 16000497	28	16000509
		Type: Install		Install (Install - Move)
		Status: Assigned		Englewood, Colorado
		Address:		Creation date: 09/02/2020 7:21:07 AM MDT
		Time zone: America/Denvi	ver (GMT -07:00)	16000533
		Customer:		Site Survey
				Englewood, Colorado
		Creation date: Wed Sep 02 20	020	Creation date: 09/02/2020 1:59:31 PM MDT
				16000513
				Install (Install - Move)
				Englewood, Colorado
				Creation date: 09/03/2020 12:47:15 PM MDT
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				Install (Install - Move)
				Englewood, Colorado
				Creation date: 09/03/2020 1:14:01 PM MDT
				16000550
				Site Survey

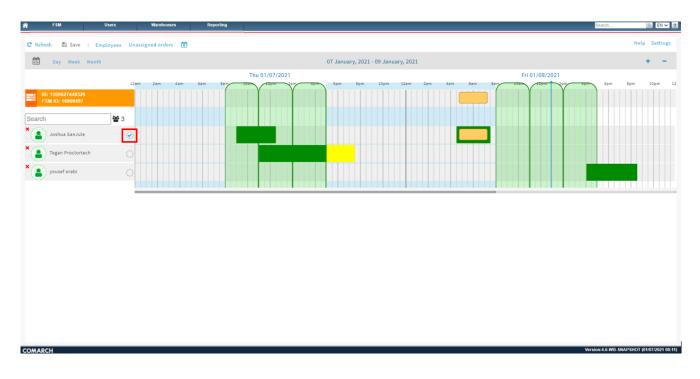
To Unassign a tech while under the Calendar & Task Management dropdown

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

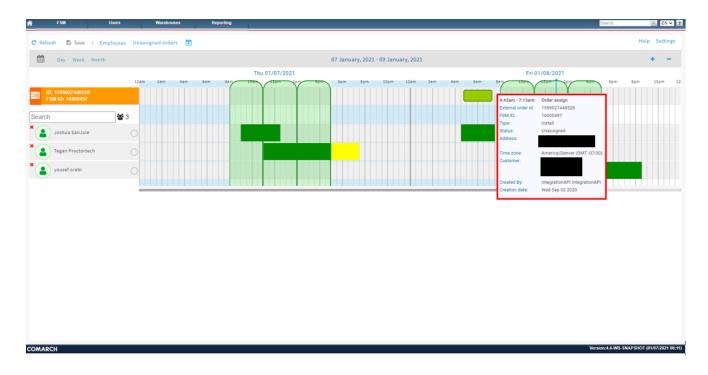


This will pull up that specific work order.

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

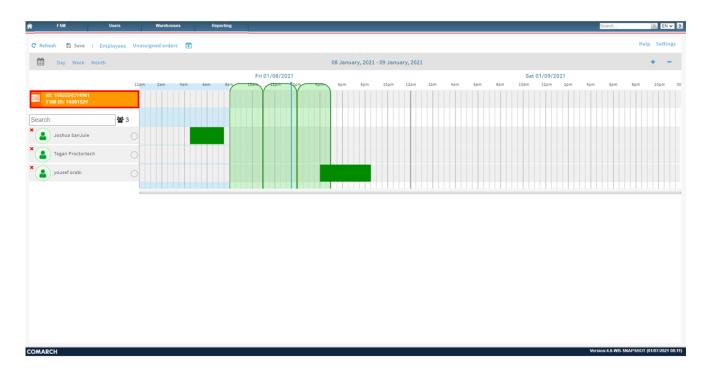


This will unassign the work order and auto save:

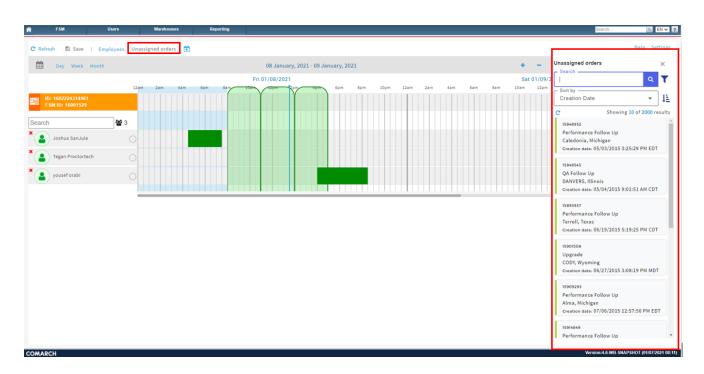


Unassigned Orders via the Scheduling Button

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.