



# Desk Reference: Managing Calendars in FSM

This Desk Reference covers:

- Searching for/Loading Employee
- Creating a Timeline
- Customize the Range
- Create a Template

This Desk Reference supports the SID Retail Dealer and VSF Dispatcher audiences. This document refers to advanced FSM features.

# Desk Reference: Managing Calendars in FSM

## Introduction to Calendars in FSM

Calendars are a key element to FSM. With the calendar, FSM can auto-assign work orders and optimizes a Technician's daily route.

A Dealer/Dispatcher uses the calendar function to tell FSM which employees (Technicians) are available during which days and hours. Each employee is loaded into the Scheduling Grid and then assigned days and hours. Using this information, FSM auto-assigns work orders to the employee.

Keep calendars as accurate as possible. When FSM does not find an available employee on the calendar, it sets the work order status to Unassigned (or Unscheduled, if Order Entry does not allow the appointment time to be chosen). Dealer/Dispatchers must manually assign these work orders to an employee calendar, which is an inefficient use of their time.

Accurate calendars also improve the optimization that occurs within 48 hours of the scheduled appointment. Working "tonight for day after tomorrow", FSM's Nightly Optimization routines look at the Fulfillment Partner's total work load for the day and develops the most efficient and organized routes for the technicians. The calendar provides key information for this process.

**Note:** Nightly Optimization is disabled for SID Retail Dealers.

Creating a calendar has five parts: search, load, insert work time, customize, and replicate. These last two steps may be interchanged as suits the user.

## A Basic Calendar

This first example creates a basic calendar using one employee as an example. It provides the basic instruction for how to search for employees, load them into the Calendar's Scheduling grid, insert work time, customizing the timeline and create a template.

### Step 1: Select Calendar & Task Management

From the FSM tab, select **Calendar & Task Management** sub-menu.

### Step 2: Select Fulfillment Partner/Employee

In the **Employee Search** section (Employees), do one of the following:

- Select the **correct Fulfillment Partner and Office**.
- **Type the Full Name** of a specific employee (Installer/Technician)

**Note:** For SID Retail Dealers, the Fulfillment Partner will be DSI or P10 SI, and the Office is the name of the Dealership.

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## A Basic Calendar (continued)

### Step 3: Search

Click **Search**.

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FSM Users

Fulfillment Partner: HD Experts

Office: Glenwood

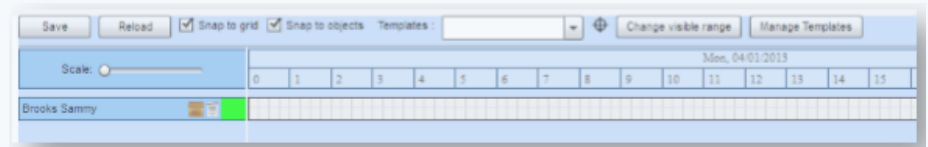
Full name:

Include FST:

Search

### Step 4: Load Employee (continued)

The Employees section collapses to show the empty time-line for the employee.



### Step 4: Load Employee

Select the desired employee from the Employee list, and click Load. **Note:** If desired, select either a Month, or a Range to configure the dates in the grid at the same time.

Month April 2013

Range 04/01/2013 06/15/2013

Employees list: Load

- Brooks Sammy
- Leslie Jason
- Levy Joseph
- McIntosh Michael
- McNallie James
- Miller Michael

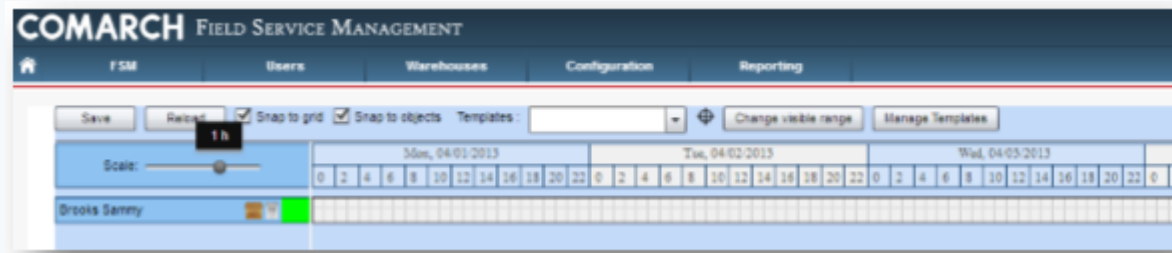
Employees

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## Creating a Timeline

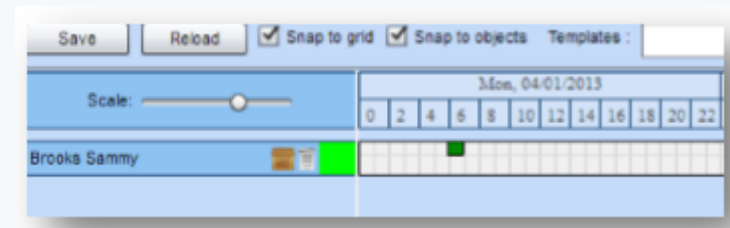
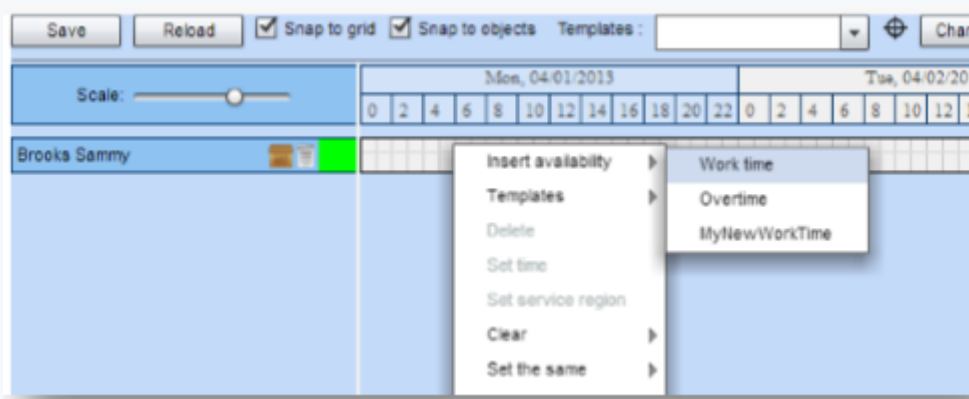
### Step 1: Show More Days

Change the **Scale** to show more days. **Slide the button** to the desired scale.



### Step 2: Select Work Time

**Double-click** the Employee timeline, and select **Insert Availability > Work Time**. This places a green time object on the timeline.



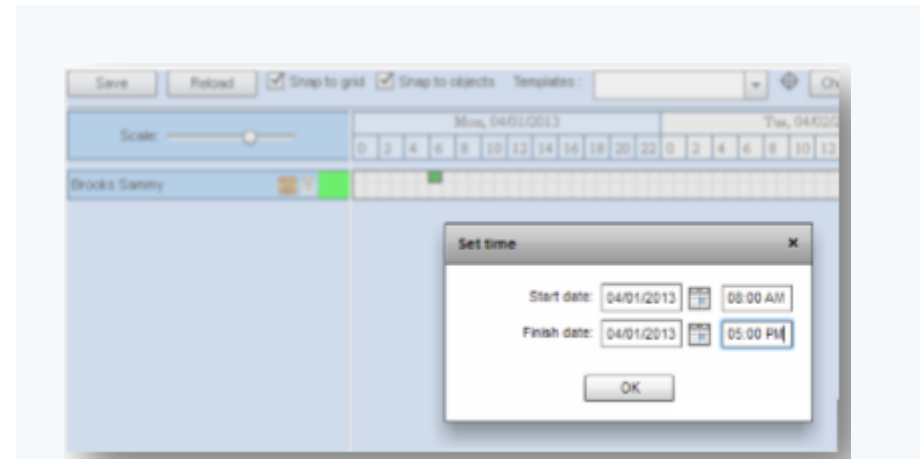
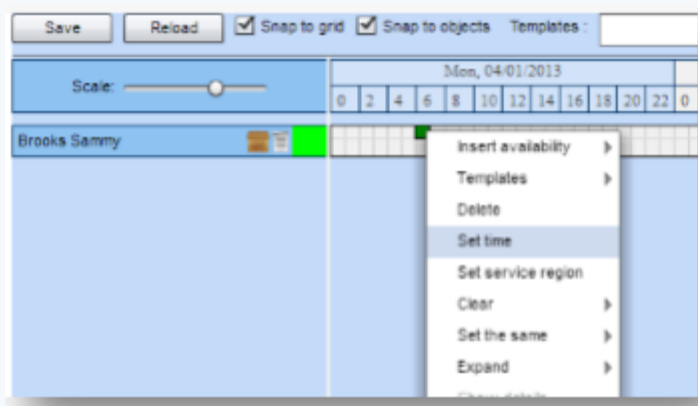
Important: When creating a calendar, always use Work Time. Do not use Overtime for this task.

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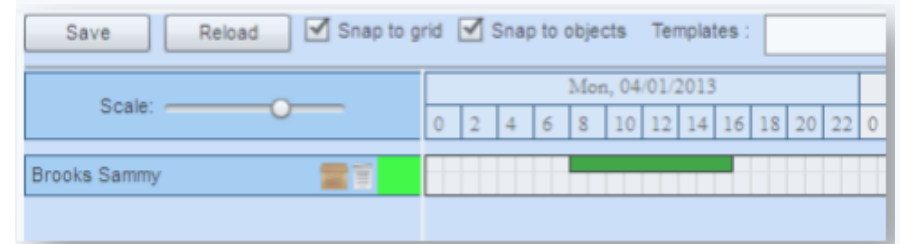
## Creating a Timeline (continued)

### Step 3: Set Time

**Double-click** the time object and select **Set Time**. Complete the Start and Finish blocks, and click OK. The time fields must be in this format: HH:MM AM



The time object expands to fill the timeline between the Start and Finish time.



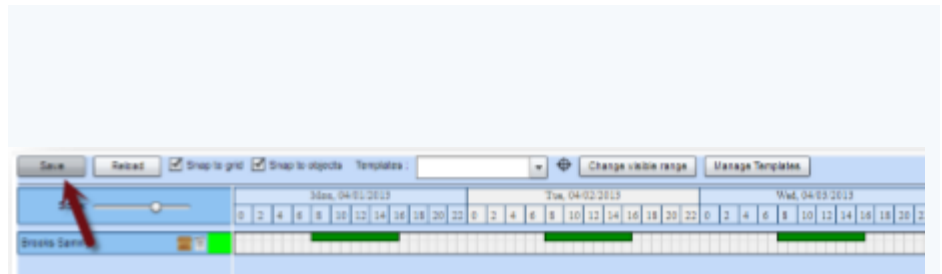
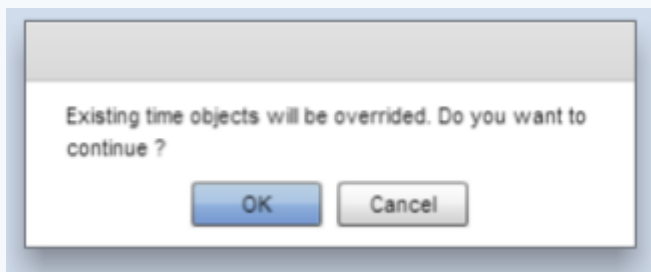
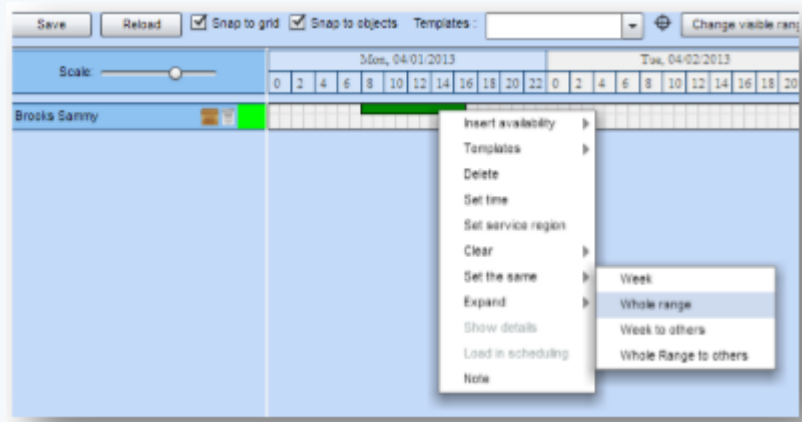
**Note:** The Date cannot go beyond the same date.

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## Creating a Timeline (continued)

### Step 4: Set Weekly or Whole Range

Double-click the time object again, and select **Set the Same > Weekly or Whole Range**. Click OK to confirm the change.



Click **Save** to save the work thus far.

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## Customize the Range

A timeline may be customized in several ways:

- Days Off
- Service Regions
- Notes

Follow these steps **to remove objects** from the timeline for days off.

Step 1: Double-click the Time Object to be Removed

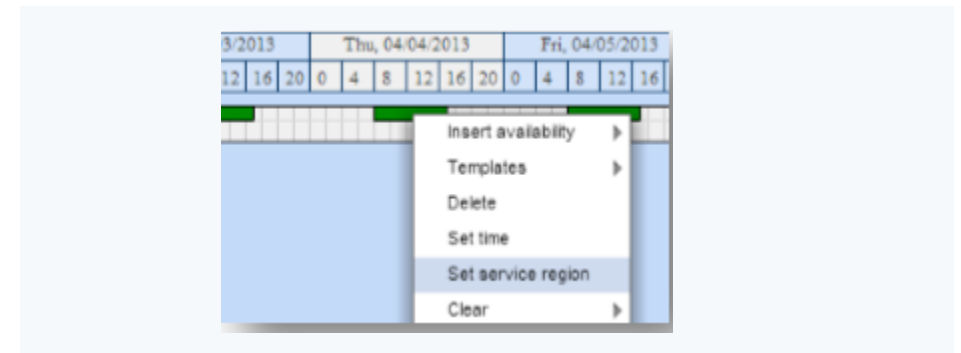
Step 2: Select Delete

Step 3: Repeat until all days are customized.

Follow these steps **to assign Service Regions** to specific days on the timeline.

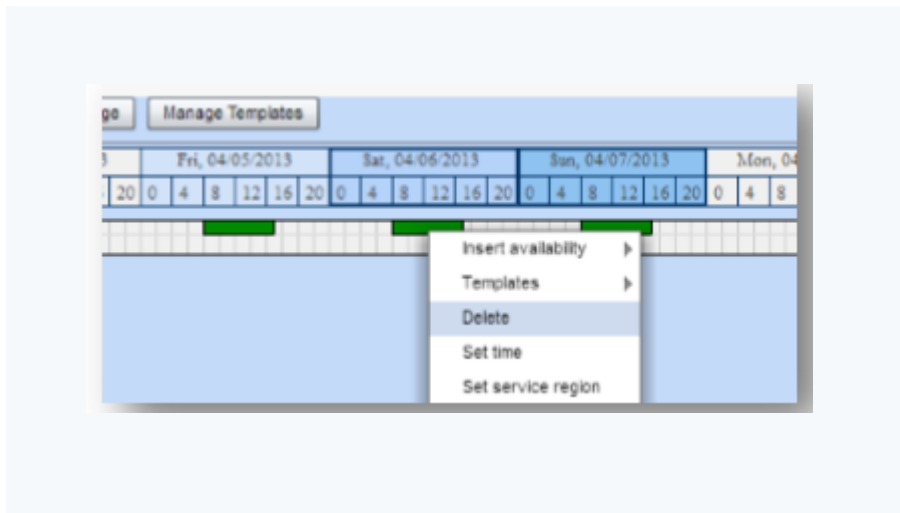
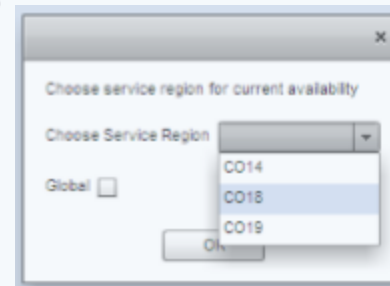
### Step 1: Configure Time Object

**Double-click** the time object that needs to be configured, and select **Set Service Region (one day at a time)**.



### Step 2: Select Service Region

Remove the **Global checkmark**. Select the **Service Region** from the drop down list. Click **OK**. (Only one Service Region may be selected.)



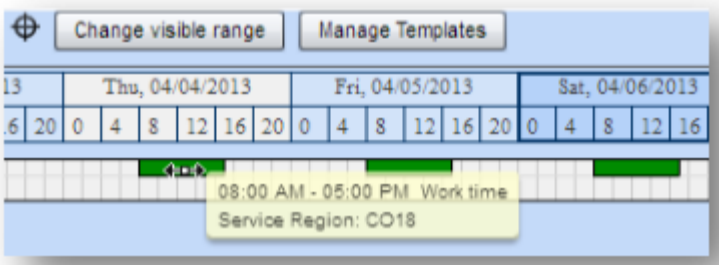
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## Customize the Range

Follow these steps **to assign Service Regions** to specific days on the timeline (continued)

### Step 3: See Service Region Customization

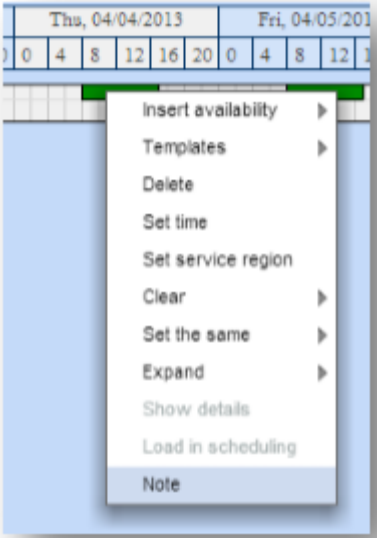
Hover the mouse over the time object to see the Service Region customization.



Follow these steps **to add a Note**.

### Step 1: Select Note

**Double-click** the time object, and select **Note**.





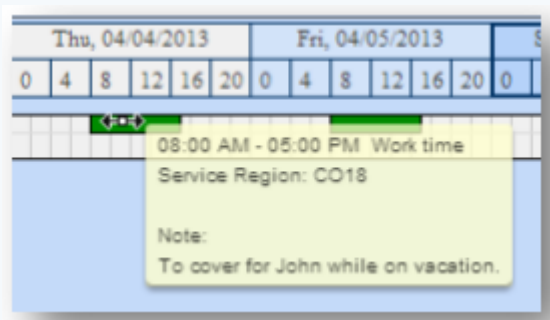
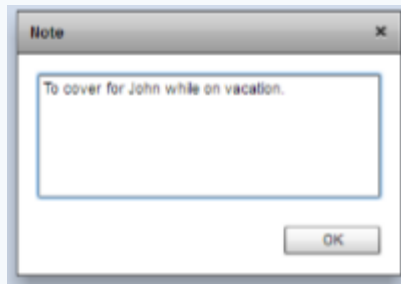
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## Customize the Range

Follow these steps to add a Note (continued.)

### Step 2: Complete the Note field

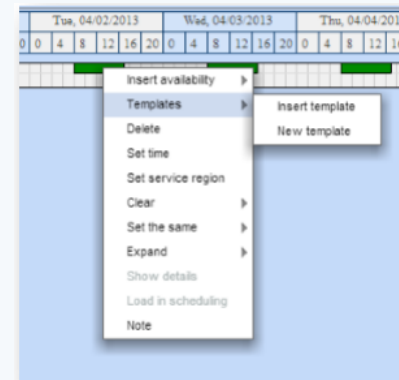
Complete the **Note** field and click **OK**.



## Create a Template

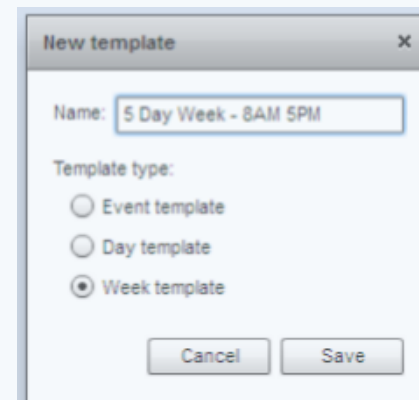
### Step 1: Select New Template

**Double-click** the timeline that will be the template, and select **Templates > New Templates**.



Step 2: Type a name that describes the template.

Step 3: Select the **type of template** (Event, Day, Week)

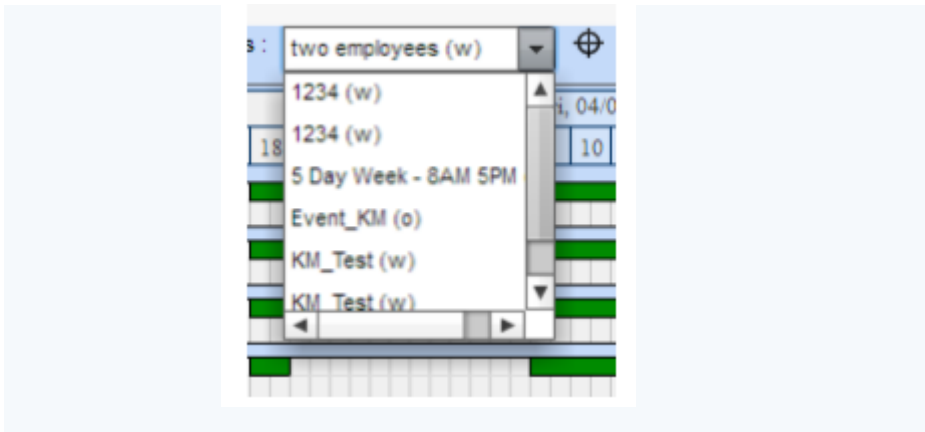


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## Create a Template (continued)

Step 4: Click **Save**

Step 5: Review the Templates drop down to confirm

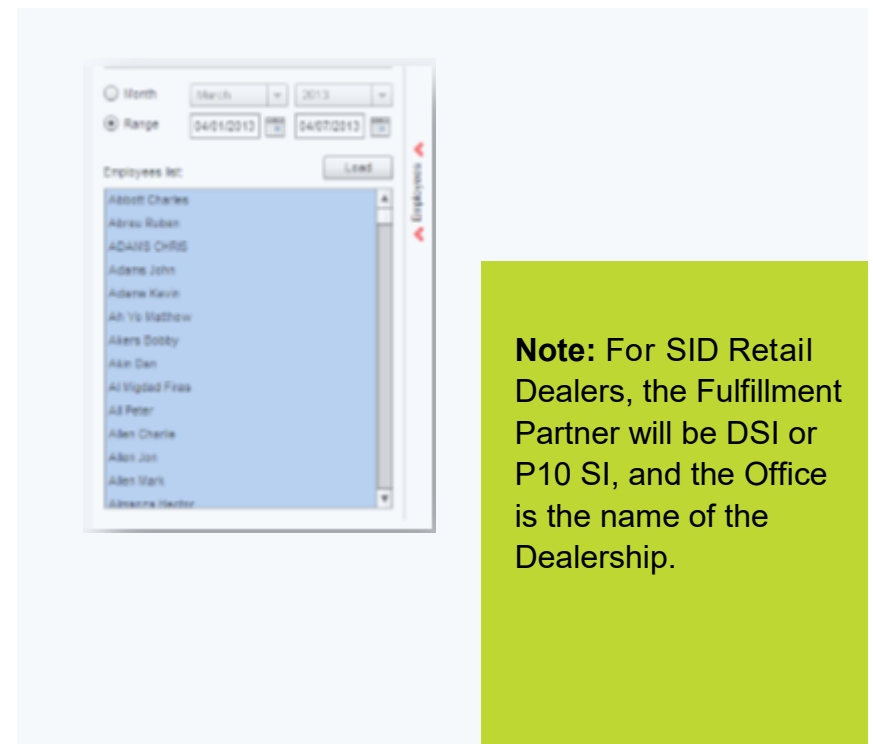


## Create an Office Calendar

Step 1: In the **Employee Search** section (Employees), select the **correct Fulfillment Partner and Office**.

Step 2: Click **Search**

Step 3: **Set the date Range** for 7 days; **select 28** employees.



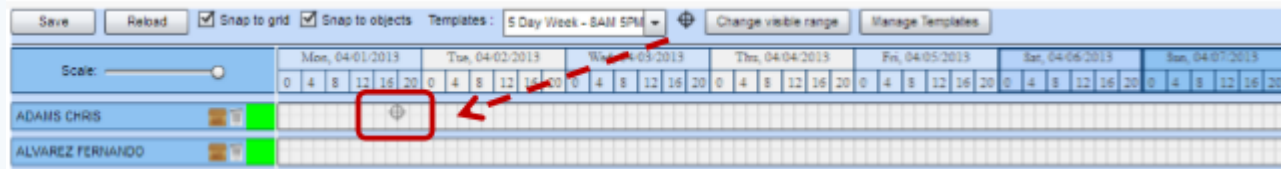
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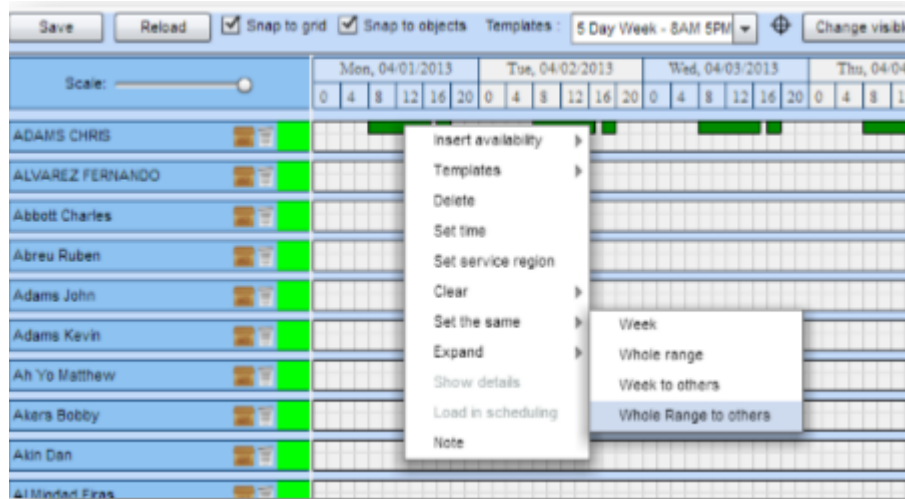
## Create an Office Calendar (continued)

Step 4: Click **Load**

Step 5: **Drag the Crosshairs** icon (next to the Template List) to the time line of the first employee.



Step 6: **Double-click** the timeline, and select **Set the Same > Whole Range to Others**.



The Calendar refreshes to show all of the timelines.

