

FSMFUN 6 –Exercises

Service Process

QUESTIONS FOR REQUESTS AND TASKS

EXERCISE 1: REQUEST AND TASK CREATION, TASK ASSIGNMENT

Step 01: Call taking process

1. Go to Service > Requests
2. Click on New button
3. Select a Request type
4. Select a place id (Customer place)
5. Select a contact
6. Select the product id
7. Enter suitable description
8. Go to Tasks tab and click on New to create a task
9. Select a task type from LOV (Service)
10. Add a value to duration
11. Select your team and technician

TIPS:

Check impact from following app params when creating the request

- DISPLAY_OPEN_REQUESTS_FOR_PLACE
- DISPLAY_OPEN_REQUESTS_FOR_PRODUCT

Step 02: Automatic Task Creation (Through Business rule)

1. Create another request with request type 'Break Fix' for a customer place
2. Click on Assign button on the top of screen

TIPS:

Check the following Business rule impact for manual assigning

- RULE ID: 01-TASK SELECTION
- RULE ID: 04 – WORK ASSIGNMENT

3. From the popup select a line and save
4. Task record will be created
5. Go to the place record and select the Travel Zone (Under Details tab > General)
6. Under Skills tab add a Skill record from the LOV



7. Go to the technician person record and add the same skill record under Skills tab. Set Core Multiplier as 1
8. Go to the team record and add your technician as a member
9. Create another request with request type 'Install' for the place id
10. Click on Assign button on the top of screen
11. From the popup select a line with your technician and save

EXERCISE 2: SCHEDULE BOARD

Step 03: Assign tasks through schedule board

1. Create few more tasks on both requests for the places MX-0010 & MY-0010
2. Go to Service > Schedule Board
3. Select the team id from the list
4. From the search panel, search all task related to the customer places used above
5. Select any task and assign it to the mobile technician (drag and drop)

Step 04: Task handling

6. Select the task and change task status to 'Accepted' through the RMB option
7. Go to the above task which status was changed
8. Assume technician is travelling to the customer site and change status to 'Enroute'
9. Go to the Details tab and check Actual Travel Start field has auto updated

TIPS:

Check the following Business rule impact

- RULE ID'S: 134- TASK STATUS BASED TIMES

10. Assume technician arrives to the customer site and change status to 'Arrived'
11. Go to the Details tab and check Actual Start field has auto updated

EXERCISE 3: TASK DEBRIEF FOR COMPLETION

1. Receive parts of Fan to the warehouse through logistic manager (Adjustment Reason-Receipt, To Place- Warehouse place, set To Location and To Bin)
2. Go to Part Needs tab under the task and click on New
3. Select the value 'Billable Part' for Line Code from the list
4. Add the part id and quantity 1
5. Enter values Place Id From 'Warehouse place above' and Location From as location where parts received in step1
6. Click on Print Picks button to create the shipment
7. Expand the line and select the shipment id created
8. Click on the shipment id go to the shipment screen
9. Add a shipment unit by selecting a serial id
10. Click on Post button then the shipment will be posted



11. Go to Product screen and search for the serial id used above
12. Notice that a new product record was created, and part was installed at customer site
13. Go Part Usage tab and check. Part is recorded as a usage
14. Add a new line with line code 'Billable Part' for another as well
15. Enter values quantity =1, Place id and Location
16. Notice that a new product record was created and part was installed at customer site

Receive broken unit back from the customer to repair.

17. Go Part Usage > Part Disposition panel and click on New
18. Select Disposition Code 'Return to Stock' from the list
19. Enter Part id, Quantity, Receiving Place and Location
20. Go to stock screen and check. Quantity was updated with 1 unit
21. Go to Labor and Expenses tab and click on New
22. Select line code 'Labor' from the list and enter value to Amount
23. Add another line with line code 'Freight' and enter value to Amount
24. Complete the task by changing the task status
25. Complete all other tasks on the request if there is any
26. Go back to the request and notice that it was auto completed

TIPS:

Check impact from following app params

- AUTO_COMPLETE_REQUEST
- AUTO_COMPLETE_REQUEST_STATUS
- AUTO_COMPLETE_TASK
- AUTO_COMPLETE_TASK_STATUS

EXAMPLE

1. AVRI customer MA-0010 have reported a breakdown in their air-condition machine AIR-CON01. Create a Request (Service) with suitable description for this customer place and add the above product.
Add a suitable contact.
2. Create a task (Service) manually under your request and set a duration for that.
 - i. Use other options to create task automatically (Business Rules)
 - ii. Check how skills are used when assigning technicians to task
3. Assign the above created task (at question 2) to your technician using the Schedule board.
 - i. Create few other tasks (Inspection, Reading, Misc etc...) and assign them to your technician using the Schedule board.
 - ii. Tryout different options in the schedule board to view data and assign-reassign tasks.
 - iii. Change the task status using schedule board options.



4. Once you are at customer site (task status=Arrived) complete the service and add followings to the task
 - i. Suppose the technician should use new parts 1-Compressor and 1-Fan to complete the repair and he doesn't have enough stocks to do that (use part needs to order parts)
 - ii. Suppose he should use 1-Condenser Coil as well but he has enough stocks in his truck
 - iii. Add labor expenses for the work you technician has done
 - iv. Add travel time cost
 - v. Add freight charges for the delivery
 - vi. Add miscellaneous for meals etc...
 - vii. Send the broken Compressor unit to your repair center or warehouse (use part disposition)
 - viii. Complete the task then request (check impact from app params)

