

# FSMFUN 6 –Exercises

## Core Entities and Components

### QUESTIONS FOR BASIC DATA SETUPS

#### EXERCISE 1: WORK CALENDAR CREATION

##### Step 1: Create Time Blocks

1. Navigate to Admin > codes > code tables screen.
2. Search for code table “TIME\_BLOCKS”.
3. Press ‘New’ button to create new line and add name for your time block in field, ‘Time Block’ and suitable description in field ‘Description’.
4. Tick the box ‘Active’ and select ‘Extract’ as extract action.
5. Define suitable start time and stop time > Save. >Refresh cache (full)

##### Step 2: Define of a Work Calendar

6. Go to ‘Work Calendar’ screen and add new.
7. Enter suitable calendar id and description.
8. Go to ‘Work Time’ tab and add new > Select day from “Day Code” column drop down and select time block created in step 1.
9. Save.

##### Step 3: Set up Exception

10. Go to exception tab > add new.
11. Add Mandatory data and save.

#### TIPS:

Untick the tick box ‘Non Working’ on exception line defined in Step 3, if the user has to work on that day even if it is a holiday.

### EXAMPLE

1. Create time blocks for (Navigation: Admin > codes > code tables),
  - i. full day work.
  - ii. Normal working day from 8Am to 5PM
  - iii. Half day from 8AM to 12 PM
2. Your business requires several shifts as below. Create them in the system.



- i. North America shift work. Normal hours from 8Am to 5PM.
  - ii. Middle East shift work. Working times from Sunday to Friday, 8Am to 5PM. Having Friday ending by 12PM.
  - iii. 24\*7 shift work. Working on all week around the clock.
3. You are having a plant shut down on the second week of each year. Set this up in the above calendars.
4. You will have Christmas holiday on 25<sup>th</sup> of December. But some people will have to work during this time for 24\*7 shift.

## **EXERCISE 2: PLACE CREATION**

Suppose customer AVI who is a service provider for air-conditions acquired FSM recently. They have 2 customer sites (MX-0010 & MY-0010), a head office (AVRI-HEAD), 1 warehouse (AVRI-WRHS), 1 truck/van stock (AVRI-TRUCK) and 1 repair center (AVRI-REPAIR).

1. Go to Service > Place
2. Enter New
3. Add a Place Id (E.g. MX-0010) and a description (Test Customer Place)
4. Set Place Status to Active
5. Set Whose place as below,
  - MX-0010 – Customer Place
  - MY-0010 – Customer Place
  - AVRI-HEAD – Retails Store
  - AVRI-WRHS – Warehouse
  - AVRI-TRUCK – Truck/Van stock
  - AVRI-REPAIR – Repair Center
6. Add a Phone number and E-mail
7. Go to Addresses tab and add a Default Address (create a new one or select an existing one)
8. Go to Contacts tab and add a Contact (create a new one or select an existing one)
9. Go to the warehouse place record created above and mark the check boxes 'Allow Part Stock' & 'Use Stock Bin' (Go to Details tab > Logistics)
10. Go to the truck place record created above and mark the check boxes 'Allow Part Stock' & 'Use Stock Bin' (Go to Details tab > Logistics). Remove 'Billing Place' check box (Go to Details tab > General)
11. Go to the repair center place record created above and mark the check boxes 'Allow Part Stock' & 'Use Stock Bin' (Go to Details tab > Logistics). Mark 'Repair Center' check box (Go to Details tab > Financial)
12. Go to the truck place record created above and define a 'Place to Bill To' place relationship, set the place as AVRI-HEAD



**EXERCISE 3: PERSON CREATION**

Suppose AVRI have 4 main people working at the organization, 1 system admin (SYS\_ADM), 1 application user (APP\_USER), 1 mobile technician (TECH) and 1 portal user (POTL\_USER).

1. Go to Admin > Person
2. Enter New
3. Add a Person Id (E.g. SYS\_ADM), Last name and First name
4. Add an e-mail, job title and select a calendar form the list
5. Set Person Status to Active and select a Person type
6. Set FSM License Type as below,
  - SYS\_ADM – STUDIO
  - APP\_USER – NAMED
  - TECH – MOBILE
  - POTL\_USER - CUSTPORTAL
7. Mark the check box Employee, set values for Language & Currency
8. Go to Security tab and enter password then save the record
9. Go to the mobile and system admin user records created above and mark the check box 'Mobile User'
10. Go to all user records and enter a value for Approval Limit (Under Details tab) and assign the Role 'ADMIN' (Under Roles tab)
11. Go to the system admin user record created above and define a 'Works From Place' place relationship, set the place as AVRI-HEAD.
12. Go to the application user record created above and define a 'Works From Place' place relationship, set the place as AVRI-WRHS.
13. Go to the technician user record created above and define a 'Works From Place' place relationship, set the place as AVRI-REPAIR. Define another relationship for 'Place For Stock', set the place as AVRI-TRUCK.
14. Go to the portal user record created above and define a 'Default Place for Portal Access' place relationship, set the place as MA-0010.
15. Check by adding values under following tabs for different users,
  - Addresses
  - Skills
  - Calendar Exceptions
  - Notes
  - Attachments

Create a team called 'AVRI-TEAM' and connect your technician and portal user to the team.

- 16 Go to Service > Admin > Teams
- 17 Click on New
- 18 Enter team id as 'AVRI-TEAM'
- 19 Add a description and save
- 20 Under Members tab select above created technician and portal user

