Tutorial - Questions for FSM Mobile

Exercise 1: Basic Data Creation

1. Check your technician user record created earlier and set following data correctly,
   a. FSM License type = Mobile
   b. Place for Stock = Truck/Van place record created earlier. Make sure to specify a location for this relationship.
   c. Works from Place = Warehouse place record created earlier

2. If you don't have enough stocks, receive 4 good units for each part (Compressor, Fan, Condenser Coil (Hot) & Evaporator Coil (Cool)) to your Truck & Warehouse places and Good location – use the logistic manager.

Perform the following in BO

Exercise 2: Create Request

1. Create a request to your customer place
2. Select a contract, add contact, add product

Exercise 3: Basic Task Handling

Step 1: Task Creation

1. Select the above request
2. Create several tasks under the request
3. Assign first task to your technician
4. See it syncs to mobile
5. Check if all entries are visible

Step 2: Task Update

1. Navigate to task from mobile
2. Check task status > change the task status until 'In process'

The tasks are appearing in mobile according to the how they are defined in 'task status flow' in smart client.

Step 3: Add Part usages

3. Click on 'Next' > Navigate to the Parts used screen
4. Select two-part usages from 'Parts from my Stock' (only available stocks are visible)

5. Select another part usage from Miscellaneous parts (stocks are visible based on Physical service group or Org service group)
6. Search for another part by using ‘Find Part’ function and see

Check ‘View Previous’ to see the added items.

7. Check the task in BO and see if recorded items are visible

Step 4: Add non-part usages

1. Hit Next and go to Labor screen
2. Add various expenses (Labor, Meetings, Travel etc…) > Hit next
3. Add any other expenses through Expenses screen
4. Hit next > go to attachment screen
5. Add attachments (Photos, Videos, Documents etc…)

Step 5: Create a new survey

1. In BO, go to Survey screen
2. Create a new survey to include the following
    a. Three multi choice questions
    b. Two radio buttons
3. Make the survey to be included in tasks
4. Hit next > complete survey

Step 6: Completing task

1. Hit next > go to Customer Review screen
2. Include the sign> Save
3. Hit next > go to Summary screen
4. Sign the summary > Complete
5. The task should move out from your mobile
6. Go to BO and check the two signatures would have got synced in to the task

Step 5: Add part Needs

5. Go to Part Needs screen through Debrief workflow
6. Add part needs

Exercise 4: Create an Opportunity

1. Go to Opportunity screen
2. Add an opportunity with desired values
3. In BO go to Quote and proceed the quote (See quote exercise to complete this)

Exercise 5: Create Purchase Order

1. Go to PO screen> add new (long press on the screen)
2. Add supplier ID and wanted date > hit Next
3. Add part ID > unit cost > hit next
4. Hit process > Submit > Approve > Post Purchase order
5. Go to receiving screen > search for the receiving id created against the PO
6. Add quantity > Process the receiving

Do above with a serialized part. In both scenarios check the stock records after receiving completed.

Exercise 6: Add Quotes

1. Go to Quote screen> add new (long press on the screen)
2. Add a name, place ID, template > Next
3. Add part ID, quantity and price > Next
4. Add labor > line code, quantity and price > Next
5. Add notes > Next
6. Add contacts by selecting through the first name > Next
7. Add attachments > Next
8. Sign the tech summary > Next
9. Sign customer summary > Accept
10. Check created Quote in BO

Exercise 7: Time reporting

1. Go to time report screen
2. Select a date
3. Hit 'Add time' > report time
4. Select another date > Hit 'add exception' and report an exception
5. Go to Person record and see the calendar exception had got created
6. Go to 'My time search' > Go to NPU ID. See for the reported time.

Exercise 8: Shipping

1. Go to stock screen > select any stock record with available quantity
2. Long press on stock record > Add Shipment
3. Add place ID to and location to
4. Add part > Process
5. You will be directed to the shipment screen and open the shipment id
6. Click on Process button to post the shipment
7. If the part is a serialized part, then click on shipment id and go to shipment unit list
8. Click on Add button to add serials
9. Select the serial id and click on add button

10. Then move back to previous screen and process the shipment

Exercise 9: Stock Counts

1. Create a stock count record in BO (stock record should be the technician's place for stock)
2. Go to stock count screen and open the count id
3. Add quantities to Usable and Unusable
4. Click on Post the stock count button
5. Check stock record in BO. Data should be updated with counted values

Exercise 10: Team Tasks

1. Create a task in BO and assign it to a team without specifying the technician (team should be your technician's team)
2. Go to mobile and open the jobs screen
3. Click on All Jobs left below of the screen and change the filter to Team tasks
4. Open the task and accept it
5. Check the changes in BO

Additional Features

- Android Tablet UI – to better utilize the space available on an Android tablet
- Auto work status update – set 4 app params starting with AUTO_WORK_STATUS_%
- Configurable photo size – set the app param 'CAMERA_PHOTO_SIZE' and upload high resolution photo
- Follow up tasks – option is available under Debrief work flow
- On demand attachments – mark 'On Demand' check box under task > attachments
- Service BOM – mark 'Service Part' under BOM line attached to the model and create a request > task connecting a product with above model. Then go to part need tab/screen and click on 'Service BOM' button