

# FSMFUN 6 –Exercises

## UI Personalization

### QUESTIONS FOR LOBBY SETUP

#### EXERCISE 1: ACCESS THE SERVICE MANAGER LOBBY

1. On the Lobby menu, select Overview.
2. On the Overview screen, locate and double-click Service Manager Lobby.
3. On the Service Manager Lobby screen, locate and note the following values:
  - Today's Assigned Tasks
  - Opportunities Opened This Week

#### EXERCISE 2: PERFORM TRANSACTIONS

4. On the Service menu, select Tasks.
5. On the My Tasks Today screen, click New.
6. In the task header, select or fill the following fields. The values you select are not significant.
  - Place ID
  - Unit ID
  - Type
7. Using the Owner lookup, select your person ID and click OK.
8. Click Save.
9. On the Sales menu, select Opportunity.
10. On the My Opportunities screen, click New.
11. In the opportunity header, select or fill the following fields. The values you select are not significant.
  - Type
  - Owner



- Opportunity Name

- Status

12. Click Save.

13. Wait for the Service Manager Lobby to refresh. Once it does, note the new values.

### **EXERCISE 3: ASSIGN A DEFAULT LOBBY**

In this procedure, you assign a default Lobby to your person record.

1. On the Admin menu, select Person.
2. On the search results screen, locate and select your Person record.
3. Select the Details tab.
4. Using the Initial Lobby ID lookup, select Service Manager Lobby. Note you can sort by title by clicking the Title heading label.
5. Click OK.
6. Click Save.
7. Click your user's name from the upper right corner and select Logout and log in again. The Service Manager Lobby appears when login is complete.

### **EXERCISE 4: PERSONALIZE A LOBBY**

In this procedure, you personalize the Service Manager Lobby. These personalization are yours alone, in contrast to customizations, which are for everyone.

1. On the Service Manager Lobby screen, click the person-with lock icon on far right corner.
2. For each element you want to personalize, click the orange gear icon.
3. On the Edit Element window, select a text color of yellow.
4. Click Close. This personalization is immediately applied.

### **EXERCISE 5: CREATE CUSTOMIZED COPIES OF DEFAULT LOBBIES**

In this procedure, you copy the Service Manager Lobby and then customize it.

Customizations are visible to everyone.

1. On the Lobby menu, select Overview.
2. On the Overview screen, scroll to and select Service Manager Lobby



3. Click the copy button, identified by the red box, above.
4. On the Duplicate Page window, select Select / Deselect All
5. Click OK. A new Lobby appears, entitled Copy of Service Manager Lobby
6. Right-click the new Lobby and select Edit.
7. Expand the Layout area
8. In the Page Title field, change the title to "Service Supervisor Lobby".
9. On the Background Color list, select "Light Green".
10. On the Opacity list, select "30%".
11. Expand the Information area.
12. In the Descriptive Text field, enter some appropriate text to describe this Lobby. Click OK to save your changes. They are immediately applied to the Lobby preview.

**EXERCISE 6: CUSTOMIZE THE LOBBY**

1. On the Service Supervisor Lobby screen, click the lock icon
2. Note the elements that appear in the left third of the screens. Use these elements to practice editing
3. The following controls enable you to work with elements:
  - a. The black x with white background deletes the element from the Lobby. It remains in the element library.
  - b. The white directional cross on green background moves the element elsewhere on the Lobby.
  - c. The orange gear on black background, when clicked, opens the Edit Element window.
4. The values on the Size list determine the size of the element with respect to the other elements. o The Element Designer button invokes the Element Designer.
5. The Reset Personalization button removes your personalizations from the element.

