

How to assign a Work Order to yourself

When you log into Intuit Field Service Management as the Manager/Dispatcher, you need to make a few changes in order to see yourself on the Dispatch board and to be able to log into the mobile app in the field. Follow the steps below in order to be able to login with the mobile app and to be able to assign work orders to yourself.

Enable Mobile Login = Yes

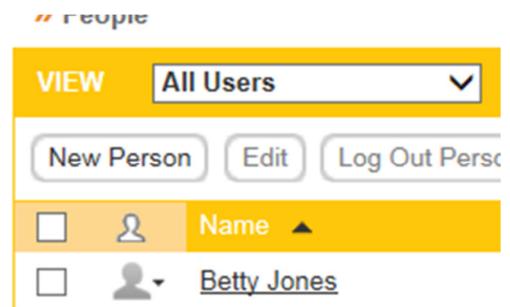
Step 1.

Click on the People Tab



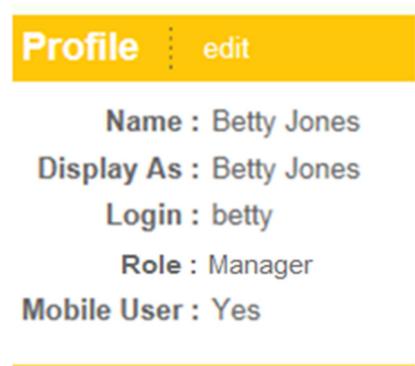
Step 2.

Locate and click on your own name



Step 3.

Scroll down to the Profile area at the bottom and click on Edit



Step 4.

Be sure that your settings for the **Mobile User** is set to **Yes**

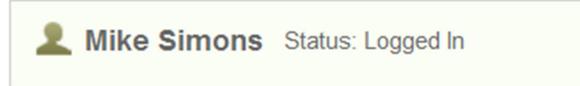
Step 5.

Click OK to save

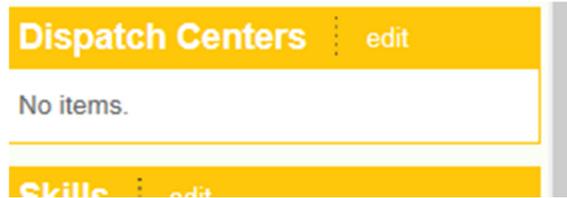
Add yourself to the Dispatch Board, Teams, and Skills

Step 1.
People Detail Screen

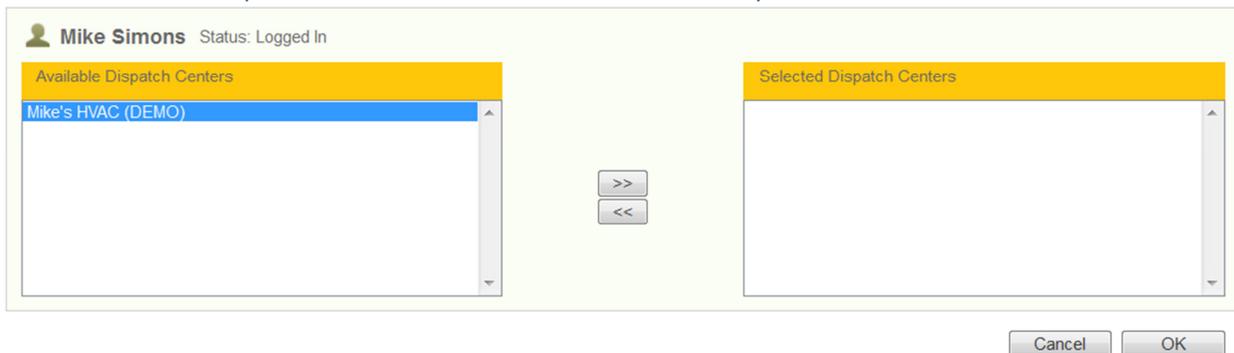
» [People](#) » People Details



Step 2.
At the bottom of the screen click on Edit on Dispatch Center



Step 3.
Next transfer the dispatch center from Available to Selected Dispatch center



Step 4.
OK to save

Step 5.
Now you need edit your Service Teams.
Click on Edit



Step 6.

Now you have to send your Available Service Team(s) over to your Selected Service team box

The screenshot shows a user interface for Mike Simons (Status: Logged In). It features two main panels: 'Available Service Teams' on the left and 'Selected Service Teams' on the right. The 'Available Service Teams' panel contains a list with three items: 'Default Service Team', 'Installation', and 'Service'. Between the two panels are two buttons: '>>' and '<<'. The 'Selected Service Teams' panel is currently empty. At the bottom right of the interface are 'Cancel' and 'OK' buttons.

Step 7.

Save to OK

Step 8.

Give yourself some Skills. Next to Skills, click Edit. Select the desired skills and click OK.

[» People](#) > [People Details](#) > [Edit Skills](#)

The screenshot shows the 'Edit Skills' interface for Mike Simons (Status: Logged In). The 'Skills' section is highlighted in yellow and contains a list of skills with checkboxes: 'Apprentice Electrician' (checked), 'Apprentice HVAC' (checked), 'Apprentice Plumber' (checked), 'Journeyman Electrician' (unchecked), 'Journeyman HVAC' (unchecked), 'Journeyman Plumber' (unchecked), 'Master Electrician' (unchecked), 'Master HVAC' (unchecked), and 'Master Plumber' (unchecked).

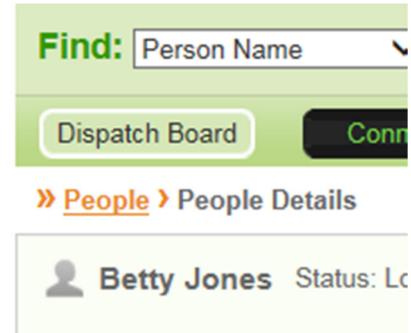
Step 9.

Next, you should now be looking at the People Detail screen. At the top left your screen should show

The screenshot shows the top left corner of the People Detail screen for Betty Jones (Status: Logged In). It features a user icon and the text 'Betty Jones Status: Logged In'.

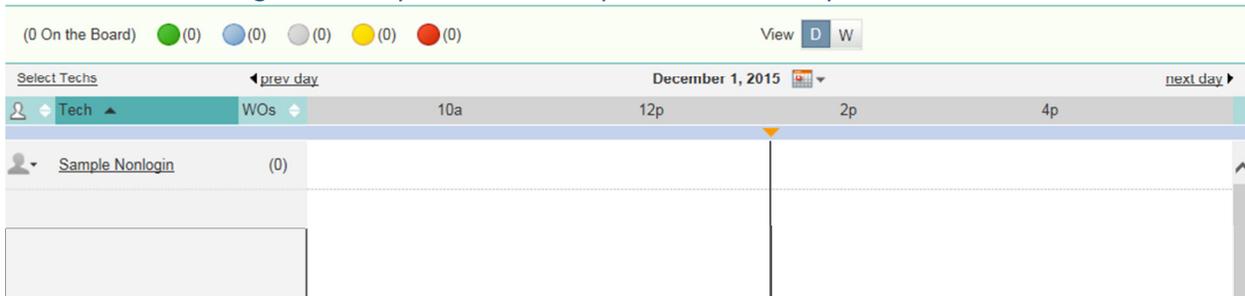
Step 10.

Above this you should see a button that says Dispatch Board. Please click on **Dispatch Board**



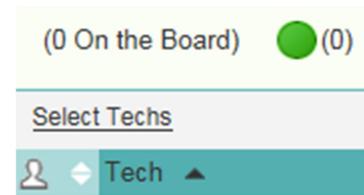
Step 11.

You should be looking at the Daily View on the Dispatch Board when you launch it



Step 12.

Please click on the link that says Select Techs



Step 13. Transfer your Name and “Unassigned” from Available to Selected Techs

The screenshot shows a window titled "Dispatch Board - Select Techs". It contains two columns: "Available Techs (1)" and "Selected Techs (12)".

Available Techs (1)	Selected Techs (12)
Betty Jones	Unassigned Sample Non-login User

Below the columns are two buttons: ">>" and "<<".

Step 14.
Click OK to Save

When you create new work orders you should now be able to assign them to yourself, to Unassigned, or to the Sample Non-login User! 😊