



Zoho Corporation

# Service Report Customization

① **Permission Required:** [Service Report Customization](#)

## Customize Service Report

The template of the [service report](#) can be customized as per your requirements. To customize the service report template, do the following:

1. Navigate to **Setup > Customization > Service Report**.
2. From the **Choose Appointment to preview** dropdown, choose a service appointment.  
The template will be populated with the details of the selected service appointment.

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Setup - Service Report

Cancel
Save

Page Layout

Customize the layout by selecting the desired sections and rearranging them through drag and drop.

Contact Details

Request Details

Service Details

Asset Details

Services & Parts

Show Pricing

Working Hours

Customer Review

Attachments

Trips

Work Order Details

Simple

Advance

Apply

Reset

Choose Service Appointment to preview

Sample data

Service Report REP - 00

#Date :-

Zylker

Contact Details

Account Name : Account 000

Customer Name : Contact 000

Service Address : Dreen City Conference Hall, Iowa City, IOWA, 35223, United States of America.

Request Details

Problem Statement : Sample Technician summary

Service Details

Service Summary : Sample Request

Service Duration : 2 Hr(s)

Technicians Involved : Field Technician 000.

Asset Details

Asset Name : Asset 00

3. Customize the [layout](#).

4. Click **Save**.

## Service Report Layouts

The service report template has three layouts.

### 1. Header Layout

The header will contain the title, company name, and the organization location information. The company logo will be present if one is included in the [Organization Profile](#). You can choose from one of the three header layouts.

about:blank

2/12

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### Setup - Service Report

Cancel Save

Header Layout

Select a header layout

Reset

Choose Service Appointment to preview Sample data

Service Report REP - 00  
#Date : -  
Zylker

Contact Details

Account Name : Account 000  
Customer Name : Contact 000  
Service Address : Dreen City Conference Hall, Iowa City, IOWA, 35223, United States of America.

Request Details

Problem Statement : Sample Technician summary

Service Details

Service Summary : Sample Request  
Service Duration : 2 Hr(s)  
Technicians Involved : Field Technician 000.

## 2. Page Layout

Using this you can customize the body of the service report. Within the page layout, you can choose to rearrange the sections, and hide or display a section.

**Reorder sections:** You can drag and drop a section to the desired position in the layout.

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Service Details

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Choose Service Appointment to preview

Sample data

Contact Details

Account Name : Account 000

Customer Name : Contact 000

Service Address : Dreen City Conference Hall, Iowa City, IOWA, 35223, United States of America.

Request Details

Problem Statement : Sample Technician summary

Service Details

Service Summary : Sample Request

Service Duration : 2 Hr(s)

Technicians Involved : Field Technician 000.

Asset Details

Asset Name : Asset 00

Asset Number : 8012345

**Remove sections:** You can exclude a section from the layout. To exclude a section from the layout, uncheck the section. If you include a section and there is no data available, then *No records found* will be displayed.

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**Page Layout**

Customize the layout by selecting the desired sections and rearranging them through drag and drop.

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Request Details
Service Details
Asset Details
Services & Parts
Show Pricing
Working Hours
Simple
Advance
Customer Review
Attachments
Trips

Reset

Choose Service Appointment to preview
Sample data

Working Hours

Date
Hours Spent

Feb 09, 2024
2 Hr(s)

Customer Review

Customer Rating
:
★★★★☆

Feedback
:
Good Service

Attachments

No records found

Work Order Details

WorkOrder Name
:
-

Done By :-  
Field Technician 000

### 3. Footer Layout

The footer will contain the name of the field agent and the customer signature (if present). You can choose from one of the three footer layouts. You can also remove the footer layout by deselecting the checkbox.

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Setup - Service Report Cancel Save

**Footer Layout** ☒ ▼

Select a footer layout

Reset

Choose Service Appointment to preview Sample data ▼

**Working Hours**

Date	Hours Spent
Feb 09, 2024	2 Hr(s)

**Customer Review**

Customer Rating : ★ ★ ★ ☆ ☆

Feedback : Good Service

**Attachments**

No records found

**Work Order Details**

WorkOrder Name : -

Done By :-  
Field Technician 000

You can use **Reset** to revert to the previous settings of the layout.

## Show Pricing

From the Service & Parts section of the Page layout, you can remove the pricing details. To remove the pricing details, unselect the checkbox **Show Pricing** in the **Service & Parts** section.

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Page Layout

Customize the layout by selecting the desired sections and rearranging them through drag and drop.

Contact Details

Request Details

Service Details

Asset Details

Services & Parts

Show Pricing

Working Hours

SimpleAdvance

Apply

Customer Review

Attachments

Trips

Reset

Choose Service Appointment to preview

Sample data

Services & Parts

ID	Name	Price(\$)	Quantity	Total(\$)
SVC-000	Service 000	760.0	1	760.0
PRT-000	Part 000	760.0	1	760.0

Sub Total\$ 1520.00

Discount\$ 0.00

Adjustment\$ 0.00

Grand Total\$ 1520.00

Working Hours

Date	Hours Spent
Feb 09, 2024	2 Hr(s)

Customer Review

Customer Rating:☆☆☆☆

Once the checkbox is unselected, the pricing details will be hidden in the Service & Parts section of the service report.

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Page Layout

Customize the layout by selecting the desired sections and rearranging them through drag and drop.

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Request Details

Service Details

Asset Details

Services & Parts

☐ Show Pricing

Working Hours

Simple ☒ Advance ☐

Apply

Customer Review

Attachments

Trips

Reset

Choose Service Appointment to preview

Sample data

Asset Name : Asset 00

Asset Number : 8012345

Services & Parts

ID	Name	Quantity
SVC-000	Service 000	1
PRT-000	Part 000	1

Working Hours

Date	Hours Spent
Feb 09, 2024	2 Hr(s)

Customer Review

Customer Rating : ★★☆☆☆

Feedback : Good Service

Attachments

## Working Hours

The Working Hours section captures the time sheet information of the service appointment. You have the option to choose a **Simple** or **Advance** view of the working hours. In the Advance view, you can group the time sheet entries by **Date** or **User** (Service Resource). Select the desired view and click Apply. Once you click **Apply**, you can see the preview in the template.



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Save

### Page Layout

Customize the layout by selecting the desired sections and rearranging them through drag and drop.

☒ Show Pricing

Working Hours
☒

☐ Simple
☒ Advance

Grouped By
Date

Date
☒

Resource
☒

Time
☒

Reset
Apply

Customer Review
☒

Attachments
☒

Trips
☐

Choose Service Appointment to preview
Sample data

Discount
\$ 0.00

Adjustment
\$ 0.00

Grand Total
\$ 2080.00

Working Hours

Date	Resource	Time
Jan 11, 2024	Field Technician 000	05:00 AM - 07:00 AM

Customer Review

Customer Rating
:
★ ★ ★ ☆ ☆

Feedback
:
Good Service

Attachments

Chats
No records found

## Technician Feedback Section

You can customize the Technician Feedback section of the service report. To do so:

1. Navigate to **Setup > Customization > Modules and Fields** and click **Service Reports**.
2. Select the **Technician Feedback** layout and add the necessary fields/customizations and click **Save**.

Refer to [this](#) page for details on how to customize a module.

## Customer Feedback Section

You can customize the Customer Review section of the service report. To do so:

1. Navigate to **Setup > Customization > Modules and Fields** and click **Service Reports**.
2. Select the **Customer Feedback** layout and add the necessary fields/customizations and click **Save**.

Service Reports ▾ Layout Customer ... ^ Cancel Save

New Fields Unused Fields Technician Feedback this page. Click 'Save' to save these changes.

Customer Feedback

Fields

Customer Review

Customer Feedback	Multi Line
Customer Rating	Rating
Customer Name	Single Line
Customer Signature	Signature
Would you recommend our ...	Pick List

Field Properties

Field label

Would you recommend our s

Validation

☐ Mandatory

Pick List Options + Add

Yes

No

Data Privacy

☐ Contains personal data(PII)

Delete

Refer to [this](#) page for details on how to customize a module.

## Add Fields In Sections

You can choose the fields that you want included in the **Asset Details** and **Work Order Details** sections of the service report template. When you select either of these sections, the fields available in them will be listed on the right side. Check the field you want to include in the section. Also, reorder the fields according to your needs. After you click **Apply**, the changes will be reflected in the respective section in the template. You can click on **Reset** ↺ to revert the changes. Click **Save** to proceed with the changes.

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Request Details

Service Details

Asset Details

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Reset

Choose Service Appointment to preview

Sample data

Technicians Involved : Field Technician 000.

Asset Details

Asset Name : Asset 00

Asset Number : 8012345

Services & Parts

ID	Name	Price(\$)	Quantity	Total(\$)
SVC-000	Service 000	760.0	1	760.0
PRT-000	Part 000	760.0	1	760.0

Sub Total

\$ 1520.00

Discount

\$ 0.00

Adjustment

\$ 0.00

Grand Total

\$ 1520.00

Working Hours

Asset Details

Customize the field and rearranging them through drag and drop.

Search

Asset Name

Asset Number

Product

Parent Asset

Asset Owner

Description

GIAI

Ordered Date

Purchased Date

Installation Date

Warranty Expiration

Reset

Apply

<https://help.zoho.com/portal/en/kb/fsm/customize-field-services/articles/customize-service-reports>