

# **Service Report Customization**

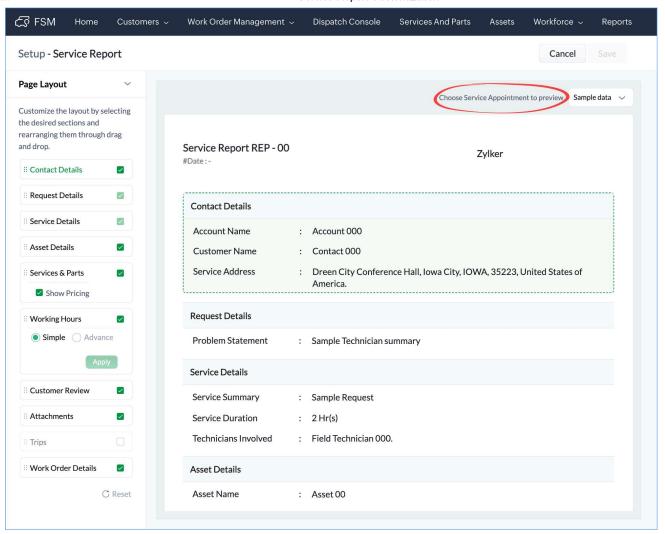
(i) Permission Required: Service Report Customization

## **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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- 3. Customize the layout.
- 4. Click Save.

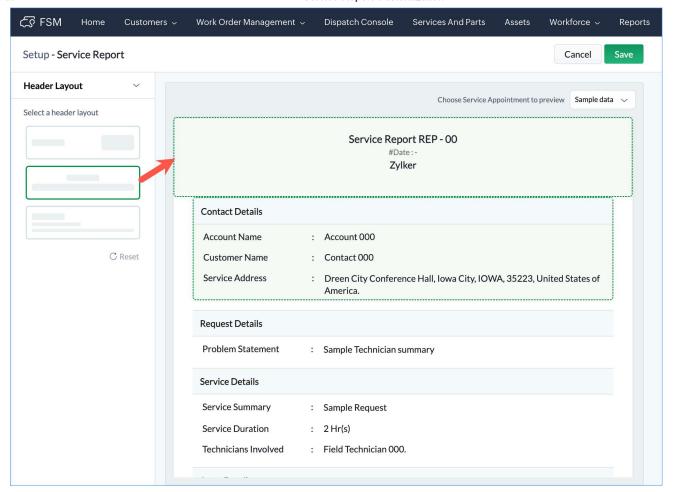
### **Service Report Layouts**

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.

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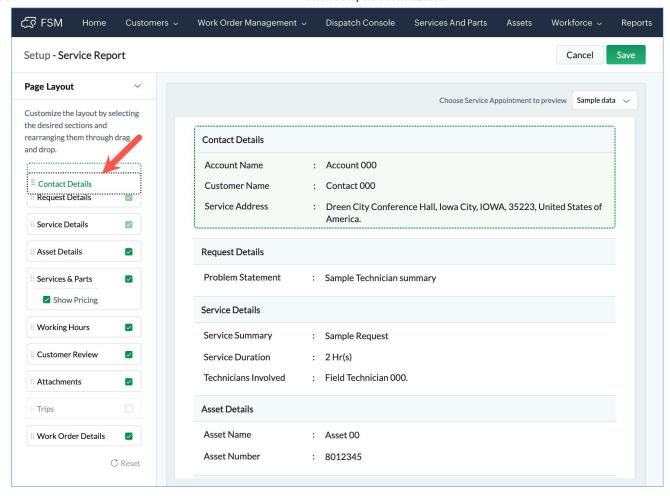


### 2. Page Layout

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.

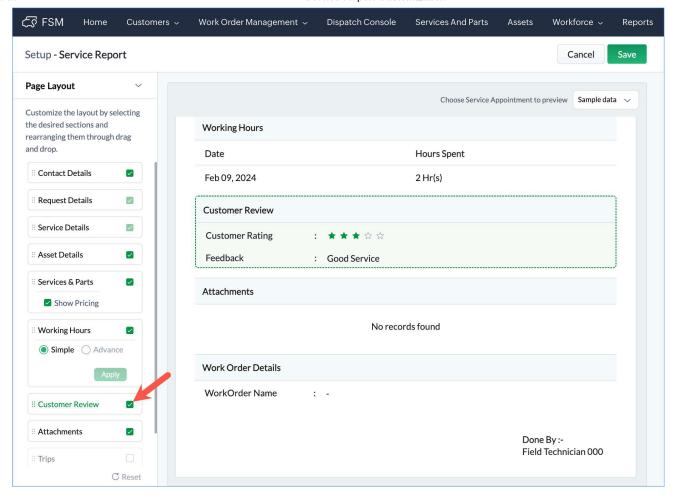
Reorder sections: You can drag and drop a section to the desired position in the layout.

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**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.

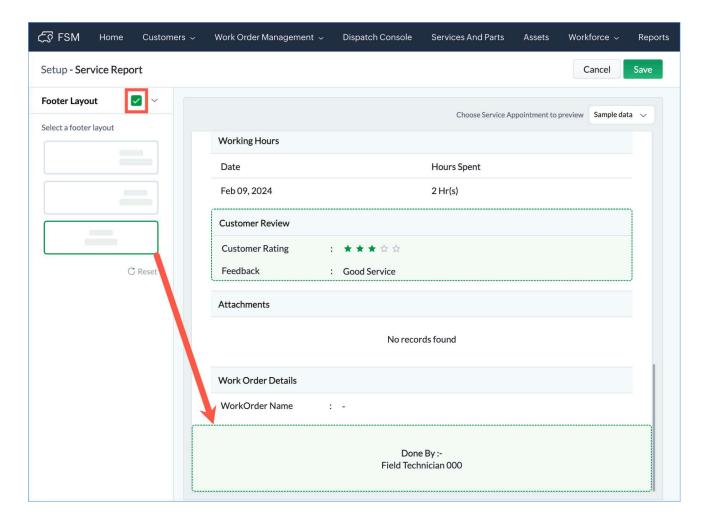
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### 3. Footer Layout

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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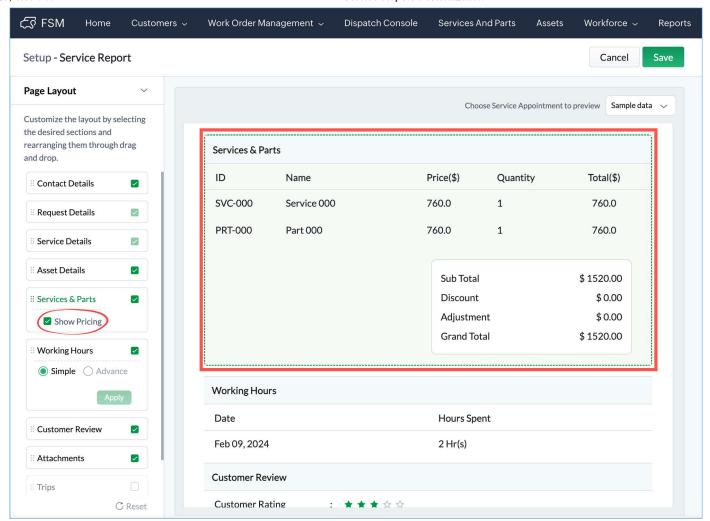


You can use **Reset** to revert to the previous settings of the layout.

### **Show Pricing**

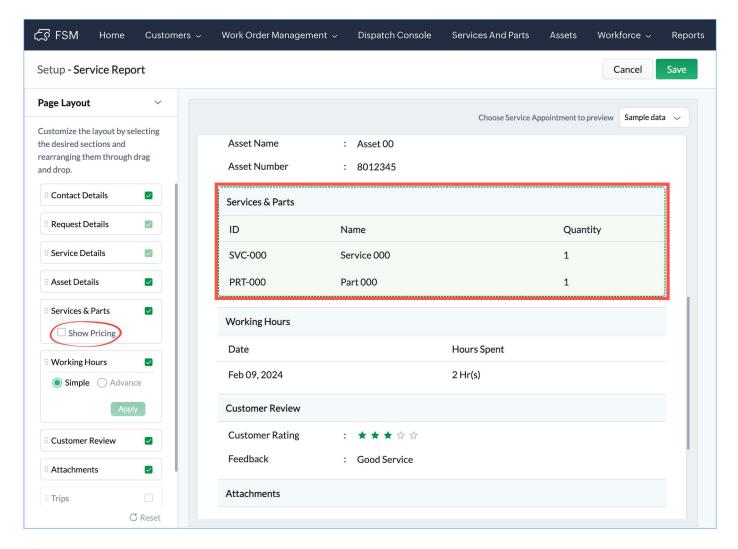
From the Service & Parts section of the Page layout, you can remove the pricing details. To remove the pricing details, unselect the checkbox **Show Pricing** in the **Service & Parts** section.

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

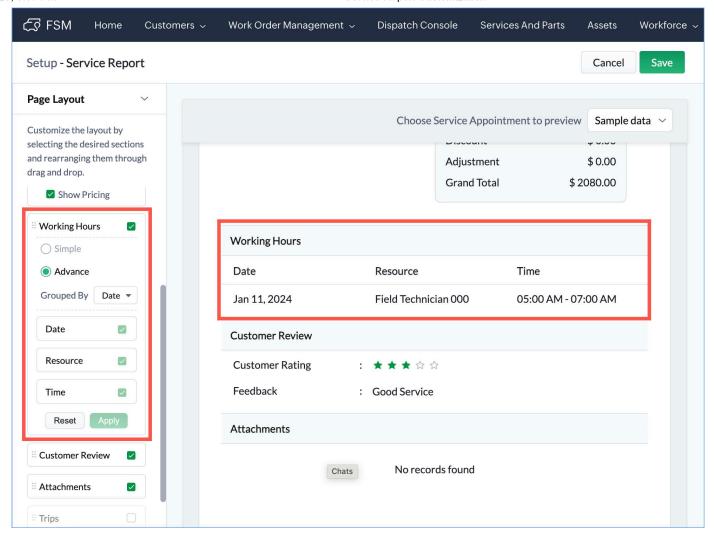
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### **Working Hours**

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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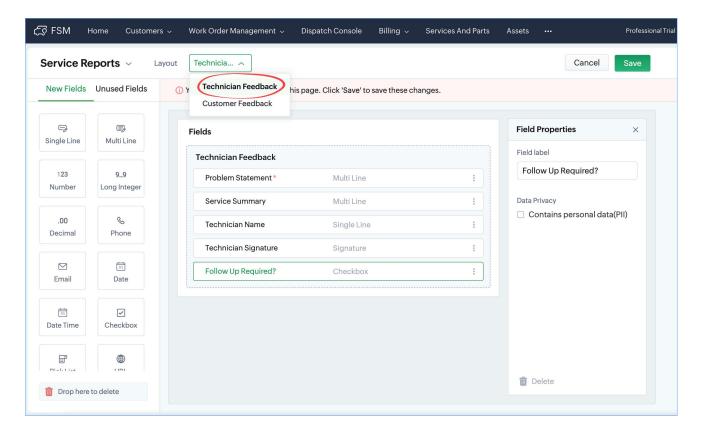


#### **Technician Feedback Section**

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**.

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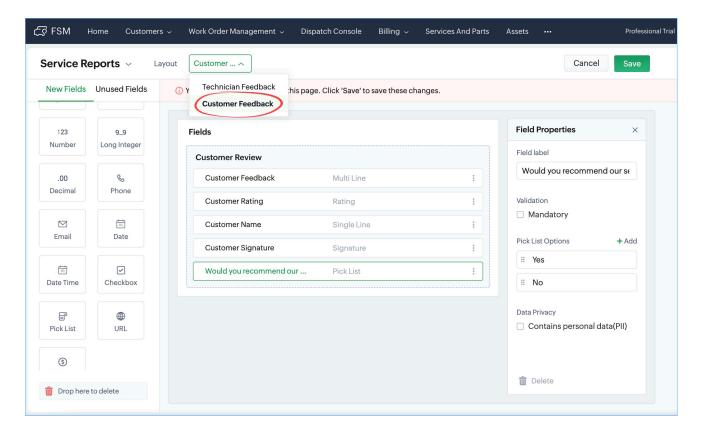
Refer to this page for details on how to customize a module.

#### **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**.

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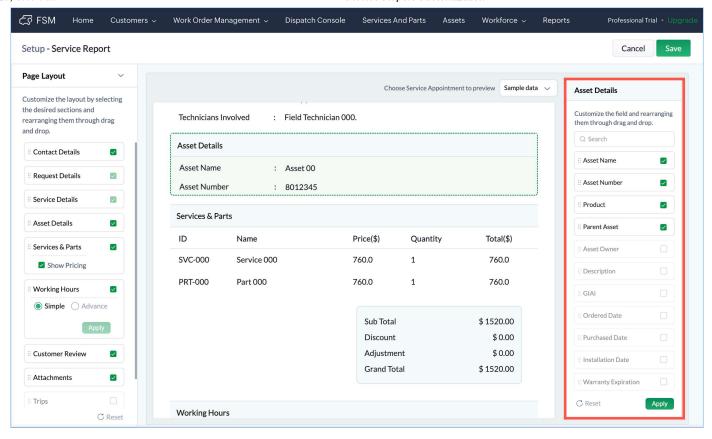


Refer to this page for details on how to customize a module.

### **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**  $\bigcirc$  to revert the changes. Click **Save** to proceed with the changes.

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