

# **Timeline**

The **Timeline** in a record captures the updates done to that record and its related records. With this you can see the history of activities associated with an entity (contacts, companies, etc).

The timeline of the Parent entity's record will display the changes done to the record of a *Parent* entity and to its *Related* records in chronological order. Changes from up to 180 days will be displayed. A timeline can be viewed in the following Parent entity's records (refer to the table below).

Parent Entity	Related Entities
Contacts	Companies
Companies	Contacts
Assets	Contacts, Companies
Requests	Contacts, Companies, Assets, Estimates, Work Orders
Estimates	Contacts, Companies, Assets, Requests, Work Orders
Work Orders	Contacts, Companies, Assets, Requests, Estimates
Service Appointments	Contacts, Companies, Assets, Requests, Work Orders
Services And Parts	-

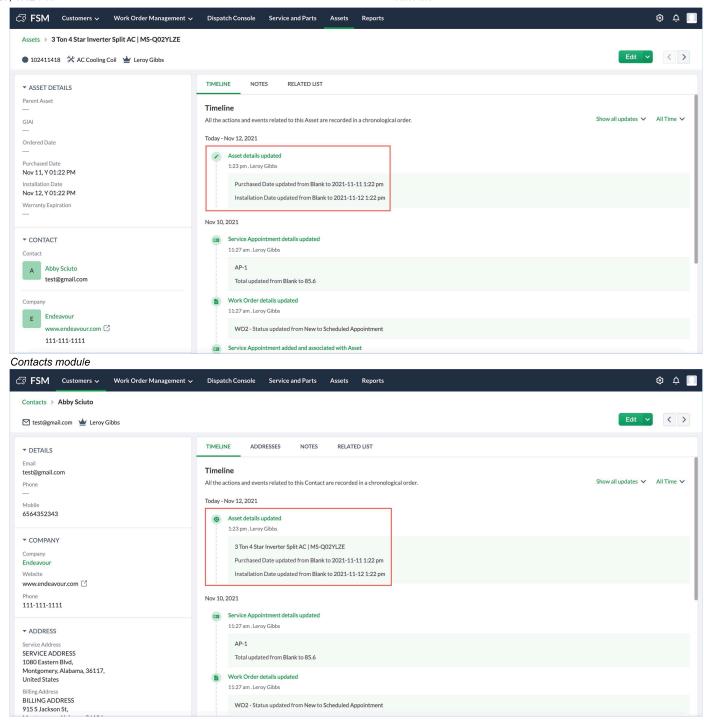
When you make changes to a Parent entity's record, the following happens:

- The change is recorded in the timeline of the Parent entity record
- The change is recorded in the timeline of the related entity records

For example, when asset details are updated, the timeline in the **Assets** (Parent) module as well as its related module, **Contacts** get updated with the change.

Assets module

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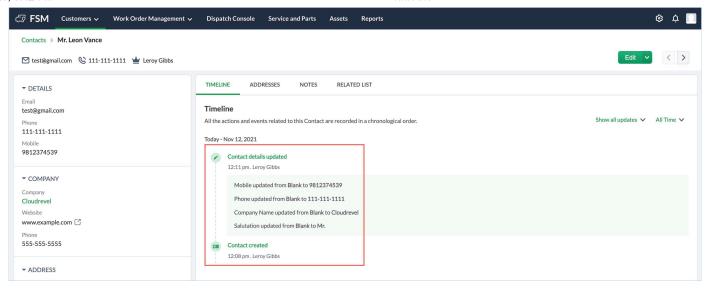
# **Activities Recorded**

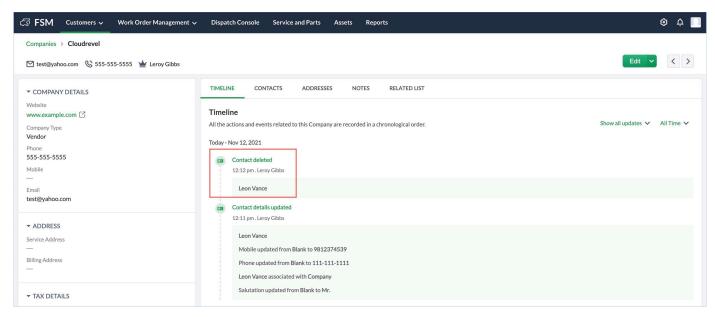
The timeline of a record will be updated when the following changes occur:

## **Record Updates**

A record is created, edited, or deleted. Edits considered also include updates to Currency information, Tax information, and Custom fields.

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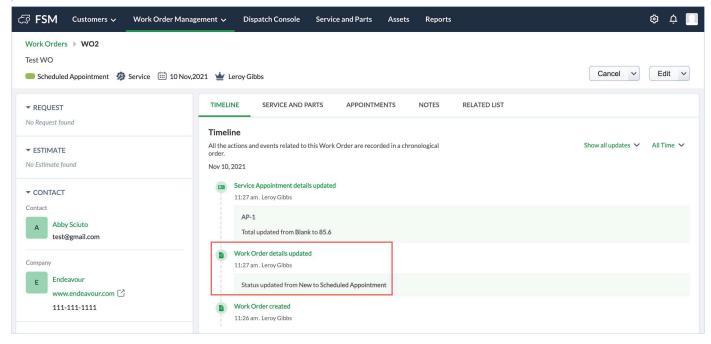




## **Status Change**

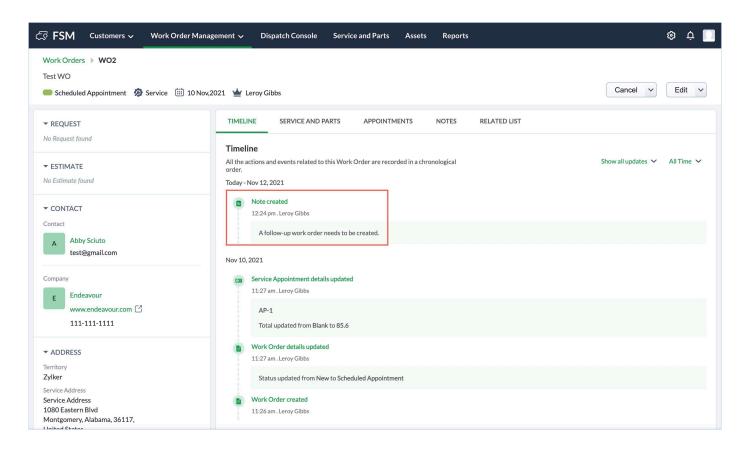
Change in the **Status** of an entity. For example, the *Status* of a work order changes from *New* to *Scheduled Appointment*.

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#### **Adding Notes**

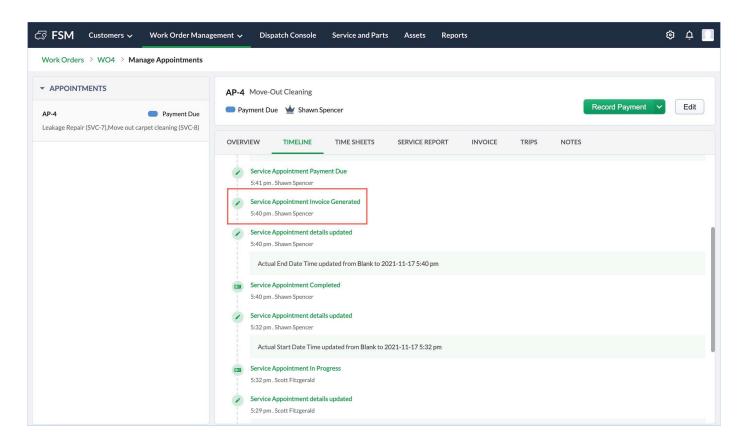
Notes are added to a record.



# **Invoice Updates**

When an invoice is created for a service appointment and any subsequent changes to the invoice.

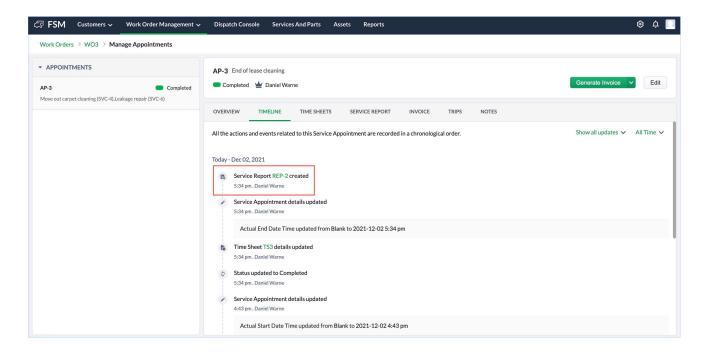
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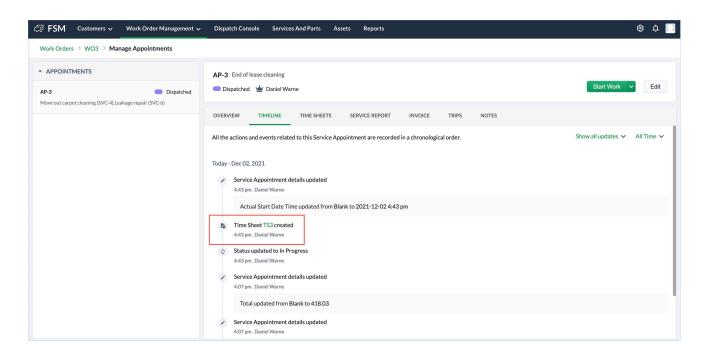
### **Service Appointment Updates**

The timeline will record the following changes related to a service appointment:

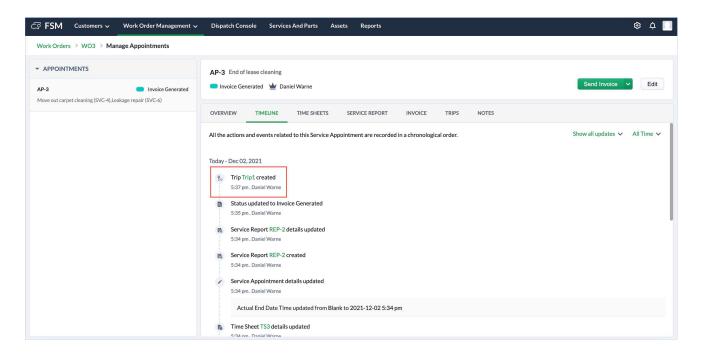
1. **Service report**: When a service report is created for a service appointment or subsequently updated. Click on the name of the service report to view the report.



2. **Time sheet**: When a time sheet is created for a service appointment or when it is updated. Click on the name of the time sheet to view the time sheet entry.



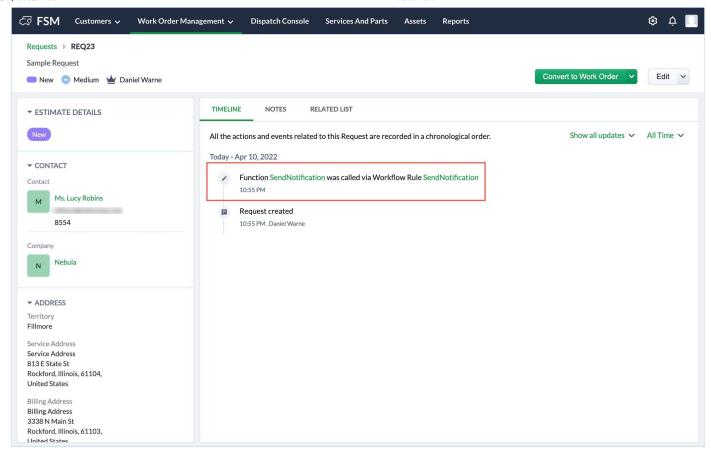
3. **Trip**: When a trip is initiated for a service appointment or when the trip details are updated. Click on the name of the trip to view the details of the trip.



## **Workflow Function Trigger Updates**

When the function defined for a module is triggered through a workflow.

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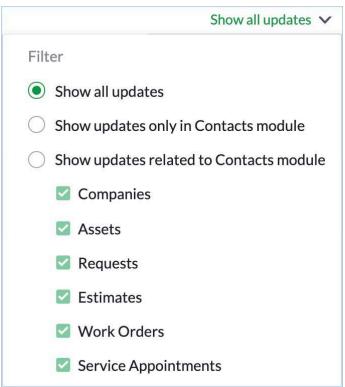


# **Filters**

The activities captured in the timeline can be filtered based on two criteria:

• Show updates related to the module alone or include updates of related records too

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• Show entries in the timeline based on the selected time range



https://help.zoho.com/portal/en/kb/fsm/data-administration/articles/timeline