



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

FSM

Customers

Work Order Management

Dispatch Console

Service and Parts

Assets

Reports

Assets

3 Ton 4 Star Inverter Split AC | M5-Q02YLZE

102411418 AC Cooling Coil Leroy Gibbs

Edit

<

>

ASSET DETAILS

Parent Asset

GI/Al

Ordered Date

Purchased Date

Nov 11, Y 01:22 PM

Installation Date

Nov 12, Y 01:22 PM

Warranty Expiration

CONTACT

Contact

A Abby Sciuto

test@gmail.com

Company

E Endeavour

www.endeavour.com

111-111-1111

TIMELINE

NOTES

RELATED LIST

Timeline

All the actions and events related to this Asset are recorded in a chronological order.

Show all updates

All Time

Today - Nov 12, 2021

Asset details updated

1:23 pm . Leroy Gibbs

Purchased Date updated from Blank to 2021-11-11 1:22 pm

Installation Date updated from Blank to 2021-11-12 1:22 pm

Nov 10, 2021

Service Appointment details updated

11:27 am . Leroy Gibbs

AP-1

Total updated from Blank to 85.6

Work Order details updated

11:27 am . Leroy Gibbs

WO2 - Status updated from New to Scheduled Appointment

Service Appointment added and associated with Asset

Contacts module

FSM

Customers

Work Order Management

Dispatch Console

Service and Parts

Assets

Reports

Contacts

Abby Sciuto

test@gmail.com Leroy Gibbs

Edit

<

>

DETAILS

Email

test@gmail.com

Phone

Mobile

6564352343

COMPANY

Company

Endeavour

Website

www.endeavour.com

Phone

111-111-1111

ADDRESS

Service Address

SERVICE ADDRESS

1080 Eastern Blvd,

Montgomery, Alabama, 36117,

United States

Billing Address

BILLING ADDRESS

915 S Jackson St,

TIMELINE

ADDRESSES

NOTES

RELATED LIST

Timeline

All the actions and events related to this Contact are recorded in a chronological order.

Show all updates

All Time

Today - Nov 12, 2021

Asset details updated

1:23 pm . Leroy Gibbs

3 Ton 4 Star Inverter Split AC | M5-Q02YLZE

Purchased Date updated from Blank to 2021-11-11 1:22 pm

Installation Date updated from Blank to 2021-11-12 1:22 pm

Nov 10, 2021

Service Appointment details updated

11:27 am . Leroy Gibbs

AP-1

Total updated from Blank to 85.6

Work Order details updated

11:27 am . Leroy Gibbs

WO2 - Status updated from New to Scheduled Appointment

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.

FSM

Customers

Work Order Management

Dispatch Console

Service and Parts

Assets

Reports

Contacts

Mr. Leon Vance

test@gmail.com

111-111-1111

Leroy Gibbs

DETAILS

Email
test@gmail.com

Phone
111-111-1111

Mobile
9812374539

COMPANY

Company
Cloudrevel

Website
www.example.com

Phone
555-555-5555

ADDRESS

TIMELINE

ADDRESSES

NOTES

RELATED LIST

Timeline

All the actions and events related to this Contact are recorded in a chronological order.

Today - Nov 12, 2021

Contact details updated

12:11 pm, Leroy Gibbs

Mobile updated from Blank to 9812374539

Phone updated from Blank to 111-111-1111

Company Name updated from Blank to Cloudrevel

Salutation updated from Blank to Mr.

Contact created

12:08 pm, Leroy Gibbs

FSM

Customers

Work Order Management

Dispatch Console

Service and Parts

Assets

Reports

Companies

Cloudrevel

test@yahoo.com

555-555-5555

Leroy Gibbs

COMPANY DETAILS

Website
www.example.com

Company Type
Vendor

Phone
555-555-5555

Mobile
—

Email
test@yahoo.com

ADDRESS

Service Address
—

Billing Address
—

TAX DETAILS

TIMELINE

CONTACTS

ADDRESSES

NOTES

RELATED LIST

Timeline

All the actions and events related to this Company are recorded in a chronological order.

Today - Nov 12, 2021

Contact deleted

12:12 pm, Leroy Gibbs

Leon Vance

Contact details updated

12:11 pm, Leroy Gibbs

Leon Vance

Mobile updated from Blank to 9812374539

Phone updated from Blank to 111-111-1111

Leon Vance associated with Company

Salutation updated from Blank to Mr.

Status Change

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

FSM Customers Work Order Management Dispatch Console Service and Parts Assets Reports

Work Orders WO2

Test WO

Scheduled Appointment Service 10 Nov, 2021 Leroy Gibbs

Cancel Edit

REQUEST
No Request found

ESTIMATE
No Estimate found

CONTACT
Contact
A Abby Sciuto
test@gmail.com
Company
E Endeavour
www.endeavour.com
111-111-1111

TIMELINE SERVICE AND PARTS APPOINTMENTS NOTES RELATED LIST

Timeline

All the actions and events related to this Work Order are recorded in a chronological order. Show all updates All Time

Nov 10, 2021

- Service Appointment details updated
11:27 am . Leroy Gibbs
AP-1
Total updated from Blank to 85.6
- Work Order details updated
11:27 am . Leroy Gibbs
Status updated from New to Scheduled Appointment
- Work Order created
11:26 am . Leroy Gibbs

Adding Notes

Notes are added to a record.

FSM Customers Work Order Management Dispatch Console Service and Parts Assets Reports

Work Orders WO2

Test WO

Scheduled Appointment Service 10 Nov, 2021 Leroy Gibbs

Cancel Edit

REQUEST
No Request found

ESTIMATE
No Estimate found

CONTACT
Contact
A Abby Sciuto
test@gmail.com
Company
E Endeavour
www.endeavour.com
111-111-1111

ADDRESS
Territory
Zylker
Service Address
Service Address
1080 Eastern Blvd
Montgomery, Alabama, 36117,
United States

TIMELINE SERVICE AND PARTS APPOINTMENTS NOTES RELATED LIST

Timeline

All the actions and events related to this Work Order are recorded in a chronological order. Show all updates All Time

Today - Nov 12, 2021

- Note created
12:24 pm . Leroy Gibbs
A follow-up work order needs to be created.

Nov 10, 2021

- Service Appointment details updated
11:27 am . Leroy Gibbs
AP-1
Total updated from Blank to 85.6
- Work Order details updated
11:27 am . Leroy Gibbs
Status updated from New to Scheduled Appointment
- Work Order created
11:26 am . Leroy Gibbs

Invoice Updates

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

FSM

Customers

Work Order Management

Dispatch Console

Service and Parts

Assets

Reports

Work Orders > WO4 > Manage Appointments

APPOINTMENTS

AP-4

Leakage Repair (SVC-7),Move out carpet cleaning (SVC-8)

Payment Due

AP-4 Move-Out Cleaning

Payment Due Shawn Spencer

Record Payment

Edit

OVERVIEW

TIMELINE

TIME SHEETS

SERVICE REPORT

INVOICE

TRIPS

NOTES

Service Appointment Payment Due

5:41 pm . Shawn Spencer

Service Appointment Invoice Generated

5:40 pm . Shawn Spencer

Service Appointment details updated

5:40 pm . Shawn Spencer

Actual End Date Time updated from Blank to 2021-11-17 5:40 pm

Service Appointment Completed

5:40 pm . Shawn Spencer

Service Appointment details updated

5:32 pm . Shawn Spencer

Actual Start Date Time updated from Blank to 2021-11-17 5:32 pm

Service Appointment In Progress

5:32 pm . Scott Fitzgerald

Service Appointment details updated

5:29 pm . Scott Fitzgerald

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.

FSM

Customers

Work Order Management

Dispatch Console

Services And Parts

Assets

Reports

Work Orders > WO3 > Manage Appointments

APPOINTMENTS

AP-3

Move out carpet cleaning (SVC-4),Leakage repair (SVC-6)

Completed

AP-3 End of lease cleaning

Completed Daniel Warne

Generate Invoice

Edit

OVERVIEW

TIMELINE

TIME SHEETS

SERVICE REPORT

INVOICE

TRIPS

NOTES

All the actions and events related to this Service Appointment are recorded in a chronological order.

Show all updates

All Time

Today - Dec 02, 2021

Service Report REP-2 created

5:34 pm . Daniel Warne

Service Appointment details updated

5:34 pm . Daniel Warne

Actual End Date Time updated from Blank to 2021-12-02 5:34 pm

Time Sheet TS3 details updated

5:34 pm . Daniel Warne

Status updated to Completed

5:34 pm . Daniel Warne

Service Appointment details updated

4:43 pm . Daniel Warne

Actual Start Date Time updated from Blank to 2021-12-02 4:43 pm

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.

The screenshot shows the FSM Work Order Management interface. The breadcrumb trail is **Work Orders > WO3 > Manage Appointments**. On the left, under **APPOINTMENTS**, **AP-3** is listed with the description "Move out carpet cleaning (SVC-4),Leakage repair (SVC-6)" and a status of "Dispatched". The main panel shows the details for **AP-3 End of lease cleaning**, with a status of "Dispatched" and a technician of "Daniel Warne". The **TIMELINE** tab is active, showing a chronological list of events for "Today - Dec 02, 2021". The event **Time Sheet TS3 created** at 4:43 pm is highlighted with a red box. Other events include "Service Appointment details updated" and "Status updated to In Progress".

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.

The screenshot shows the FSM Work Order Management interface. The breadcrumb trail is **Work Orders > WO3 > Manage Appointments**. On the left, under **APPOINTMENTS**, **AP-3** is listed with the description "Move out carpet cleaning (SVC-4),Leakage repair (SVC-6)" and a status of "Invoice Generated". The main panel shows the details for **AP-3 End of lease cleaning**, with a status of "Invoice Generated" and a technician of "Daniel Warne". The **TIMELINE** tab is active, showing a chronological list of events for "Today - Dec 02, 2021". The event **Trip Trip1 created** at 5:37 pm is highlighted with a red box. Other events include "Status updated to Invoice Generated", "Service Report REP-2 details updated", "Service Report REP-2 created", and "Service Appointment details updated".

Workflow Function Trigger Updates

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

The screenshot shows the FSM (Field Service Management) interface for a specific request, REQ23. The top navigation bar includes links for Customers, Work Order Management, Dispatch Console, Services And Parts, Assets, and Reports. The left sidebar contains sections for ESTIMATE DETAILS, CONTACT, and ADDRESS. The main content area is titled 'Requests > REQ23' and shows a 'Sample Request' with status 'New', priority 'Medium', and assigned to 'Daniel Warne'. A 'Convert to Work Order' button and an 'Edit' button are visible. The 'TIMELINE' tab is active, displaying a chronological list of events. The first event, 'Function SendNotification was called via Workflow Rule SendNotification', is highlighted with a red box. The second event is 'Request created'.

Requests > REQ23

Sample Request

New Medium Daniel Warne

Convert to Work Order Edit

ESTIMATE DETAILS

CONTACT

Ms. Lucy Robins

8554

Company

Nebula

ADDRESS

Territory

Fillmore

Service Address

813 E State St

Rockford, Illinois, 61104, United States

Billing Address

3338 N Main St

Rockford, Illinois, 61103, United States

TIMELINE NOTES RELATED LIST

All the actions and events related to this Request are recorded in a chronological order. Show all updates All Time

Today - Apr 10, 2022

Function SendNotification was called via Workflow Rule SendNotification

10:55 PM

Request created

10:55 PM - Daniel Warne

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

Show all updates ▼

Filter

☒ Show all updates

☐ Show updates only in Contacts module

☐ Show updates related to Contacts module

☒ Companies

☒ Assets

☒ Requests

☒ Estimates

☒ Work Orders

☒ Service Appointments

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

All Time ▼

All Time

Last 7 days

Last 30 days

Last 4 months

Last 12 months

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