



# Customize Standard Modules

You can customize the modules in FSM to suit the needs of your organizational process. You can choose the fields which are essential for your process, set their properties, and placement in the module.

**i** - Permission Required: [Modules Customization](#)

## Add Custom Fields

To customize a module:

1. Navigate to **Setup > Customization > Module and Fields**.

Only users with the profile **Administrator** will have this option.

2. Click the module you want to customize.

3. In the *Module Builder* page, drag and drop the fields you want from the *New Fields* tray.

- Enter the properties for the field and click **Save**.
- You can also drag and drop a new [section](#), provide a name for the section and add fields to the section and click **Save**.
- For the **Services and Parts** module, select the required layout depending on whether you want to customize the *Create Parts* page or *Create Services* page.

**Contacts** Cancel Save

**New Fields** Unused fields ⓘ You have unsaved changes in this page. Click 'Save' to save these changes.

**Fields**

**Contact Details**

Salutation Pick List

First Name Single Line

Last Name \* Single Line

Email \* Email

Phone Phone

Mobile Phone

Company Lookup

**Twitter ID** Single Line

**Address**

Service Address Address

Billing Address Address

**Tax**

Taxable \* Taxable

**Field Properties**

Field label  
Twitter ID

Validation  
 Mandatory

Character Limit  
128

Data Privacy  
 Contains personal data (PII)

Data Security  
 Encrypt data

Delete

Drop here to delete

### ⓘ Points to remember

- The field customization added to the service appointment module will not reflect in the *Reschedule* overlay.
- You cannot add new fields to the **Service Appointment Summary** section, you can only modify the existing ones. If you need to add a new field to the service appointment module, you have to add it in a new section.

The different types of fields that can be added to a module are listed in the table below. The number of custom fields you can create will depend on your [FSM edition](#).

| Field Type  | Description  |
|-------------|--|
| Single Line | Text field. Maximum of 255 characters are allowed.             |
| Multi Line  | Textarea. Small is 2000 characters, Large is 32000 characters. |
| Number      | The maximum allowable length is 9                              |

|              |  |
|--------------|--|
| Long Integer | The maximum allowable length is 18   |
| Decimal      | The maximum allowable length is 16 including a maximum of 2 decimal places   |
| Phone        | Field for entering a Phone number  |
| Email        | Field for entering an Email address  |
| Date         | Date Field. Default format is MMM D, Y. Date format will be changed according to user's time zone settings.  |
| Date Time    | Date Time Field. Default format is MMM D, Y hh:mm. A Date format will be changed according to user's time zone settings.   |
| Checkbox     | Field to make a binary choice, typically between two options: checked (selected) or unchecked (deselected).  |
| Pick list    | Dropdown field   |
| Auto-Number  | If you need to have incremental values or a series for a field, you can use the auto-number field. This customization is currently limited to a few pre-defined fields (Request Name, Estimate Name, Work Order Name, and Appointment Name). |
| URL          | Field for entering web address of a specific webpage or website  |
| Currency     | Field for entering monetary values   |

## Text

### Single Line

You can define the following properties for a Single Line field:

- **Field label:** A name for the field
- **Mandatory:** Mark the field as required
- **Character Limit:** Maximum characters allowed
- **Contains personal data (PII):** To designate the field as one having **Personally Identifiable Information** like mailing address, or SSN
- **Encrypt data:** To encrypt the data in the field

**Contacts** Cancel Save

**New Fields** Unused fields ⓘ You have unsaved changes in this page. Click 'Save' to save these changes.

**Single Line** Multi Line

123 Number .00 Decimal

Phone Email

Date Date Time

Checkbox Pick List

New Section

Drop here to delete

**Fields**

**Contact Details**

|             |             |
|-------------|-------------|
| Salutation  | Pick List   |
| First Name  | Single Line |
| Last Name * | Single Line |
| Email *     | Email       |
| Phone       | Phone       |
| Mobile      | Phone       |
| Company     | Lookup      |
| Twitter ID  | Single Line |

**Address**

|                 |         |
|-----------------|---------|
| Service Address | Address |
| Billing Address | Address |

**Tax**

|           |         |
|-----------|---------|
| Taxable * | Taxable |
|-----------|---------|

**Field Properties**

Field label  
Twitter ID

Validation  
 Mandatory

Character Limit  
128

Data Privacy  
 Contains personal data (PII)

Data Security  
 Encrypt data

Delete

## Multi Line

You can define the following properties for a Multi Line field:

- **Field label:** A name for the field
- **Mandatory:** Mark the field as required
- **Character Limit:** Maximum characters allowed
- **Contains personal data (PII):** To designate the field as one having **Personally Identifiable Information** like mailing address, or SSN
- **Encrypt data:** To encrypt the data in the field

**Contacts** Cancel Save

**New Fields** Unused fields ⓘ You have unsaved changes in this page. Click 'Save' to save these changes.

**Fields**

**Contact Details**

Salutation Pick List

First Name Single Line

Last Name \* Single Line

Email \* Email

Phone Phone

Mobile Phone

Company Lookup

**Company Description** Multi Line

**Address**

Service Address Address

Billing Address Address

**Tax**

Taxable \* Taxable

**Field Properties**

Field label  
Company Description

Validation  
 Mandatory

Character Limit  
2000

Data Privacy  
 Contains personal data (PII)

Data Security  
 Encrypt data

Delete

Single Line Multi Line

123 Number .00 Decimal

Phone Email

Date Date Time

Checkbox Pick List

New Section

Drop here to delete

## Number

You can define the following properties for a Number field:

- **Field label:** A name for the field
- **Mandatory:** Mark the field as required
- **Maximum digits allowed:** The length of the field
- **Contains personal data (PII):** To designate the field as one having Personally Identifiable Information like mailing address, or SSN
- **Encrypt data:** To encrypt the data in the field

**Contacts** ▾ Cancel Save

**New Fields** Unused fields ⓘ You have unsaved changes in this page. Click 'Save' to save these changes.

**Fields**

**Contact Details**

|                              |             |   |
|------------------------------|-------------|---|
| Salutation                   | Pick List   | ⋮ |
| First Name                   | Single Line | ⋮ |
| Last Name *                  | Single Line | ⋮ |
| Email *                      | Email       | ⋮ |
| Phone                        | Phone       | ⋮ |
| Mobile                       | Phone       | ⋮ |
| Company                      | Lookup      | ⋮ |
| Social Security Number (SSN) | Number      | ⋮ |

**Address**

|                 |         |   |
|-----------------|---------|---|
| Service Address | Address | ⋮ |
| Billing Address | Address | ⋮ |

**Tax**

|           |         |   |
|-----------|---------|---|
| Taxable * | Taxable | ⋮ |
|-----------|---------|---|

**Field Properties** ×

Field label  
Social Security Number (SSN)

Validation  
 Mandatory

Maximum digits allowed  
9 ▾

Data Privacy  
 Contains personal data (PII)

Data Security  
 Encrypt data

Delete

## Long Integer

You can define the following properties for a Long Integer field:

- **Field label:** A name for the field
- **Mandatory:** Mark the field as required
- **Maximum digits allowed:** The length of the field
- **Contains personal data (PII):** To designate the field as one having Personally Identifiable Information like mailing address, or SSN
- **Encrypt data:** To encrypt the data in the field

## Decimal

You can define the following properties for a Decimal field:

- **Field label:** A name for the field
- **Mandatory:** Mark the field as required
- **Maximum digits allowed:** The length of the field
- **Number of decimal places:** The number of decimal places allowed
- **Contains personal data (PII):** To designate the field as one having Personally Identifiable Information like mailing address, or SSN
- **Encrypt data:** To encrypt the data in the field

**Contacts** Cancel Save

**New Fields** Unused fields ⓘ You have unsaved changes in this page. Click 'Save' to save these changes.

Single Line Multi Line

123 Number **.00 Decimal**

Phone Email

Date Date Time

Checkbox Pick List

New Section

Drop here to delete

**Fields**

**Contact Details**

|                         |             |
|-------------------------|-------------|
| Salutation              | Pick List   |
| First Name              | Single Line |
| Last Name *             | Single Line |
| Email *                 | Email       |
| Phone                   | Phone       |
| Mobile                  | Phone       |
| Company                 | Lookup      |
| <b>Household Income</b> | Decimal     |

**Address**

|                 |         |
|-----------------|---------|
| Service Address | Address |
| Billing Address | Address |

**Tax**

|           |         |
|-----------|---------|
| Taxable * | Taxable |
|-----------|---------|

**Field Properties**

Field label  
Household Income

Validation  
 Mandatory

Maximum digits allowed  
16

Number of decimal places  
2

Data Privacy  
 Contains personal data (PII)

Data Security  
 Encrypt data

Delete

## Phone

You can define the following properties for a Phone field:

- **Field label:** A name for the field
- **Mandatory:** Mark the field as required
- **Contains personal data (PII):** To designate the field as one having **Personally Identifiable Information** like mailing address, or SSN
- **Encrypt data:** To encrypt the data in the field

**Contacts** ▾ Cancel Save

**New Fields** Unused fields ⓘ You have unsaved changes in this page. Click 'Save' to save these changes.

**Single Line** **Multi Line**

123 **Number**    .00 **Decimal**

**Phone** **Email**

**Date** **Date Time**

**Checkbox** **Pick List**

**New Section**

Drop here to delete

**Fields**

**Contact Details**

|             |             |
|-------------|-------------|
| Salutation  | Pick List   |
| First Name  | Single Line |
| Last Name * | Single Line |
| Email *     | Email       |
| Phone       | Phone       |
| Mobile      | Phone       |
| Company     | Lookup      |
| Fax         | Phone       |

**Address**

|                 |         |
|-----------------|---------|
| Service Address | Address |
| Billing Address | Address |

**Tax**

|           |         |
|-----------|---------|
| Taxable * | Taxable |
|-----------|---------|

**Field Properties** ✕

Field label  
Fax

Validation  
 Mandatory

Data Privacy  
 Contains personal data (PII)

Data Security  
 Encrypt data

Delete

## Email

You can define the following properties for an Email field:

- **Field label:** A name for the field
- **Mandatory:** Mark the field as required
- **Contains personal data (PII):** To designate the field as one having **Personally Identifiable Information** like mailing address, or SSN
- **Encrypt data:** To encrypt the data in the field

**Contacts** Cancel Save

**New Fields** Unused fields ⓘ You have unsaved changes in this page. Click 'Save' to save these changes.

**Fields**

**Contact Details**

|                 |             |
|-----------------|-------------|
| Salutation      | Pick List   |
| First Name      | Single Line |
| Last Name *     | Single Line |
| Email *         | Email       |
| Phone           | Phone       |
| Mobile          | Phone       |
| Company         | Lookup      |
| Alternate Email | Email       |

**Address**

|                 |         |
|-----------------|---------|
| Service Address | Address |
| Billing Address | Address |

**Tax**

|           |         |
|-----------|---------|
| Taxable * | Taxable |
|-----------|---------|

**Field Properties** ×

Field label  
Alternate Email

Validation  
 Mandatory

Data Privacy  
 Contains personal data (PII)

Data Security  
 Encrypt data

🗑️ Delete

**Field Properties**

Field label  
Alternate Email

Validation  
 Mandatory

Data Privacy  
 Contains personal data (PII)

Data Security  
 Encrypt data

🗑️ Delete

## Date

You can define the following properties for a Date field:

- **Field label:** A name for the field
- **Mandatory:** Mark the field as required
- **Date Range:** Allowable date range the user can select from
- **Contains personal data (PII):** To designate the field as one having **Personally Identifiable Information** like mailing address, or SSN
- **Encrypt data:** To encrypt the data in the field

**Contacts** Cancel Save

**New Fields** Unused fields ⓘ You have unsaved changes in this page. Click 'Save' to save these changes.

**Fields**

**Contact Details**

- Salutation Pick List
- First Name Single Line
- Last Name \* Single Line
- Email \* Email
- Phone Phone
- Mobile Phone
- Company Lookup
- Date of Birth** Date

**Address**

- Service Address Address
- Billing Address Address

**Tax**

- Taxable \* Taxable

**Field Properties**

Field label  
Date of Birth

Validation  
 Mandatory

Date Range  
Last 12 Months

Data Privacy  
 Contains personal data (PII)

Data Security  
 Encrypt data

🗑️ Delete

**Field Properties**

Field label  
Date of Birth

Validation  
 Mandatory

Date Range  
Last 12 Months

Data Privacy  
 Contains personal data (PII)

Data Security  
 Encrypt data

🗑️ Delete

## Date Time

You can define the following properties for a Date Time field:

- **Field label:** A name for the field
- **Mandatory:** Mark the field as required
- **Date Range:** Allowable date range the user can select from
- **Contains personal data (PII):** To designate the field as one having **Personally Identifiable Information** like mailing address, or SSN
- **Encrypt data:** To encrypt the data in the field

Requests Cancel Save

New Fields Unused fields ⓘ You have unsaved changes in this page. Click 'Save' to save these changes.

**Fields**

**Request Details**

|              |             |
|--------------|-------------|
| Request Name | Auto-Number |
| Summary*     | Multi Line  |
| Priority     | Pick List   |
| Due Date     | Date        |
| Start Time   | Date Time   |

**Contact Details**

|          |        |
|----------|--------|
| Company  | Lookup |
| Contact* | Lookup |
| Email    | Email  |
| Phone    | Phone  |

**Asset Details**

|       |        |
|-------|--------|
| Asset | Lookup |
|-------|--------|

**Field Properties**

Field label  
Start Time

Validation  
 Mandatory

Date Range  
Select

Data Privacy  
 Contains personal data (PII)

Data Security  
 Encrypt data

Delete

## Checkbox

You can define the following properties for a Checkbox field:

- **Field label:** A name for the field
- **Contains personal data (PII):** To designate the field as one having **Personally Identifiable Information** like mailing address, or SSN

**Contacts** Cancel Save

**New Fields** Unused fields ⓘ You have unsaved changes in this page. Click 'Save' to save these changes.

**Fields**

**Contact Details**

- Salutation Pick List
- First Name Single Line
- Last Name \* Single Line
- Email \* Email
- Phone Phone
- Mobile Phone
- Company Lookup
- Is Partner?** Boolean

**Address**

- Service Address Address
- Billing Address Address

**Tax**

- Taxable \* Taxable

**Field Properties** ×

Field label

Is Partner?

Data Privacy

Contains personal data (PII)

🗑️ Delete

Single Line Multi Line

123 Number .00 Decimal

Phone Email

Date Date Time

**Checkbox** Pick List

New Section

🗑️ Drop here to delete

## Pick List

You can define the following properties for a Pick List field:

- **Field label:** A name for the field  
Duplicate field labels will not be allowed.
- **Mandatory:** Mark the field as required
- **Pick list Options:** Values of the pick list.  
While adding a new pick list field, click **Add** to add the values and 🗑️ to remove the value. Use **Set default value** to choose the value you want the pick list to have even if the user does not explicitly select one.
- **Contains personal data (PII):** To designate the field as one having **Personally Identifiable Information** like mailing address, or SSN
- Special characters (except @, \$, %, &) will not be allowed in this field.

**Contacts** Cancel Save

**New Fields** **Unused Fields** ⓘ You have unsaved changes in this page. Click 'Save' to save these changes.

**123**  
Number

**9...9**  
Long Integer

**.00**  
Decimal

**☎**  
Phone

**✉**  
Email

**📅**  
Date

**📅**  
Date Time

**☑**  
Checkbox

**☰**  
**Pick List**

**🌐**  
URL

**💰**  
Currency

**📁** New Section

**🗑** Drop here to delete

**Fields**

**Contact Details**

|                 |             |   |
|-----------------|-------------|---|
| Salutation      | Pick List   | ⋮ |
| First Name      | Single Line | ⋮ |
| Last Name *     | Single Line | ⋮ |
| Email           | Email       | ⋮ |
| Phone           | Phone       | ⋮ |
| Mobile          | Phone       | ⋮ |
| Company         | Lookup      | ⋮ |
| Type            | Pick List   | ⋮ |
| Currency *      | Pick List   | ⋮ |
| Exchange Rate * | Decimal     | ⋮ |
| Designation     | Single Line | ⋮ |

**Field Properties** ✕

Field label  
**Type**

Validation  
 Mandatory

Pick List Options + Add

Enable colour for pick list

Set default value

Regional ▼

☰ Regional ⬇

☰ National ⬇

☰ International ⬇

Data Privacy  
 Contains personal data(PII)

**🗑 Delete**

You can perform the following actions on a pick list:

- Click **+Add** to add new values
- You can edit the existing values
- Click the **Delete** [ 🗑 ] icon to remove a value.
- Click [ ☰ ] to reorder the pick list values.

**Contacts** Cancel Save

**New Fields** Unused Fields ⓘ You have unsaved changes in this page. Click 'Save' to save these changes.

|                       |                     |
|-----------------------|---------------------|
| 123<br>Number         | 9_9<br>Long Integer |
| .00<br>Decimal        | ☎<br>Phone          |
| ✉<br>Email            | 📅<br>Date           |
| 📅<br>Date Time        | ☑<br>Checkbox       |
| 📄<br>Pick List        | 🌐<br>URL            |
| 👤<br>Currency         |                     |
| 📁 New Section         |                     |
| 🗑 Drop here to delete |                     |

**Fields**

**Contact Details**

|                 |             |   |
|-----------------|-------------|---|
| Salutation      | Pick List   | ⋮ |
| First Name      | Single Line | ⋮ |
| Last Name *     | Single Line | ⋮ |
| Email           | Email       | ⋮ |
| Phone           | Phone       | ⋮ |
| Mobile          | Phone       | ⋮ |
| Company         | Lookup      | ⋮ |
| Type            | Pick List   | ⋮ |
| Currency *      | Pick List   | ⋮ |
| Exchange Rate * | Decimal     | ⋮ |
| Designation     | Single Line | ⋮ |

**Field Properties** ×

Field label  
Type

Validation  
 Mandatory

Pick List Options + Add

Enable colour for pick list  
 Set default value

Regional ▾

Regional ▾

National ▾

International 🗑 👇

Data Privacy  
 Contains personal data (PII)  
Delete

### 📘 Points to remember

- In each Zoho FSM edition, the following are the limits for the number of custom pick list fields that can be added with the option **Enable colour for pick list** enabled:
  - Professional - 5
  - Standard - 2
  - Free - 2
- In a custom pick list, if the option **Enable colour for pick list** is enabled, you cannot add more than 50 pick list options. If there are more than 50 pick list options, you will not be able to enable the **Enable colour for pick list** option.

## Auto-Number

If you need to have incremental values or a series for a field, you can use the auto-number field. This customization is currently limited to a few pre-defined fields (Request Name, Estimate Name, Work Order Name, and Appointment Name). The auto-number has the following format:

Prefix Start number Suffix

Example of an auto-number is **Zylker-0001-13-10-22**, where,

**Zylker-** is the **Prefix**  
**0001** is the **Start number**  
**-13-10-22** is the **Suffix**

You can define the Auto-Number field as follows:

- **Prefix**

- A starting string for the auto-number. It will be appended before the Start number.
- Alphanumeric (0-9, a-z, A-Z) values are allowed.
- Special chars except !, #, ^, \*, (, are allowed.
- You can add current dates using the format **Day-Month-Year** where,

| Value | Format         |
|-------|----------------|
| Day   | (dd)           |
| Month | (MM) or (MMM)  |
| Year  | (yy) or (yyyy) |

E.g. **(dd)-(MM)-(yy)** or **(dd)-(MMM)-(yyyy)**

- Prefix is optional
- **Start number:** The value provided here will be incremented for each subsequent record. Only numbers are allowed.
- **Suffix**
  - An ending string for the auto-number. It will be appended after the Start number.
  - Alphanumeric (0-9, a-z, A-Z) values are allowed.
  - Special chars except !, #, ^, \*, (, are allowed.
  - You can add current dates using the format **Day-Month-Year** where,

| Value | Format         |
|-------|----------------|
| Day   | (dd)           |
| Month | (MM) or (MMM)  |
| Year  | (yy) or (yyyy) |

E.g. **(dd)-(MM)-(yy)** or **(dd)-(MMM)-(yyyy)**

- Suffix is optional

**Preview:** It will display the value that will be used in the next record created.

Estimates Cancel Save

**New Fields** Unused fields ⓘ You have unsaved changes in this page. Click 'Save' to save these changes.

**Fields**

**Estimate Details**

Estimate Name Auto-Number

Summary\* Multi Line

Expiry Date Date

**Contact Details**

Company Lookup

Contact\* Lookup

Email\* Email

Phone Phone

**Asset Details**

Asset Lookup

**Address**

Territory Lookup

**Field Properties**

Field label  
Estimate Name

Api name  
**Name**

Validation  
 Mandatory

Auto-Number Format

Prefix  
Zylker-

Start number  
0001

Suffix  
-(dd)-(MM)-(yy)

Preview:  
Zylker-0001-13-10-22

Single Line Multi Line

123 Number .00 Decimal

Phone Email

Date Date Time

Checkbox Pick List

New Section

Drop here to delete

The changes made to the auto-number field will only be applied to the future records.

## URL

You can define the following properties for a URL field:

- **Field label:** A name for the field
- **Mandatory:** Mark the field as required
- **Character Limit:** Maximum characters allowed
- **Contains personal data (PII):** To designate the field as one having **Personally Identifiable Information** like mailing address, or SSN
- **Encrypt data:** To encrypt the data in the field

## Currency

You can define the following properties for a Currency field:

- **Field label:** A name for the field
- **Mandatory:** Mark the field as required
- **Maximum digits allowed:** Maximum digits allowed. This includes the **Number of decimal places** as well.
- **Number of decimal places:** Maximum number of decimal places allowed
- **Contains personal data (PII):** To designate the field as one having **Personally Identifiable Information** like mailing address, or SSN
- **Encrypt data:** To encrypt the data in the field

## Manage Sections

The following are the actions that can be performed on a section:

1. **Add sections:** Add a new section by dragging and dropping the **New Section** tile from the *New Fields* tray. You can add fields to the section thus newly added. Fields can be added only inside a section.



However, there are some predefined sections to which you cannot add fields.

2. **Reposition sections:** You can move a section by hovering over the section header and dragging it (see screenshot below) to the desired location within the page. The fields can be moved within a section as well as between sections.

Services And Parts Layout Parts Cancel Save

**New Fields** Unused fields You have unsaved changes in this page. Click 'Save' to save these changes.

Single Line Multi Line

123 Number .00 Decimal

Phone Email

Date Date Time

Checkbox Pick List

New Section

Drop here to delete

**Fields**

**Part Details**

Name\* Single Line

Description Multi Line

Taxable\* Taxable

**Field Properties**

Field label

Name

Api name

Name

Validation

Mandatory

Character Limit

255

Data Privacy

Contains personal data (PII)

3. **Rename labels:** The section and field name labels are editable.

4. **Delete:** You can remove a section by clicking the Delete [🗑️] icon.

If a section has mandatory or system-configured fields, then the section cannot be deleted.

## Edit Custom Fields

You can edit a custom field. You can change the field label, length, etc. You can also reposition a field by dragging and dropping it to its new position.

To edit a custom field:

1. Navigate to **Setup > Customization > Module and Fields**.
2. Click the module whose fields you want to edit.
3. Select the field you want to edit and make edits to its properties listed in the right pane.
4. Click **Save**.

 Some system-configured fields can be edited.

## Delete Custom Fields

You can delete a custom field. The field can be deleted temporarily or permanently.

To delete a custom field temporarily:

1. Navigate to **Setup > Customization > Module and Fields**.
2. Click the module whose fields you want to delete.
3. Select the field you want to delete and click the **more options** [ : ] icon for a field. Click **Remove**.  
You can also delete a field using the **Delete** [ 🗑 ] icon at the bottom of the right pane. The deleted field will be moved to **Unused fields**.

The screenshot displays the 'Contacts' customization interface. On the left, there are tabs for 'New Fields' and 'Unused fields'. Below these are various field types like 'Single Line', 'Multi Line', 'Number', 'Decimal', 'Phone', 'Email', 'Date', 'Date Time', 'Checkbox', and 'Pick List'. The main area shows a list of fields under 'Fields', categorized into 'Contact Details', 'Address', and 'Tax'. The 'Phone' field is highlighted, and a red arrow points to its 'Remove' button. On the right, the 'Field Properties' pane is open, showing details for the 'Phone' field, including 'Field label', 'Api name', 'Validation', 'Data Privacy', and 'Data Security'. A red arrow points to the 'Delete' button at the bottom of this pane.

4. In the confirmation message, click **Yes, Move to Unused Fields**.



## Remove Field - Phone

The field you are about to remove from this layout will be moved to the Unused Fields section in the left panel.

Cancel

Yes, Move to Unused Fields

If the field is used in the [service report template](#), then the field cannot be deleted.



## Unable to remove this field

This field 'Email' is used in the following places. Remove the dependencies and then try to remove the field.

Refresh

### Service Report

- [Customize Service Report](#)

Ok

You can also drag and drop a field to **Drop here to delete** located at the bottom of the **New Fields** tray.

**Contacts** Cancel Save

**New Fields** **Unused fields**

Single Line Multi Line

123 Number .00 Decimal

Phone Email

Date Date Time

Checkbox Pick List

New Section

**Fields**

|               |             |   |
|---------------|-------------|---|
| Salutation    | Pick List   | ⋮ |
| First Name    | Single Line | ⋮ |
| Last Name *   | Single Line | ⋮ |
| Email *       | Email       | ⋮ |
| Mobile        | Phone       | ⋮ |
| Company       | Lookup      | ⋮ |
| [Empty Field] |             |   |

**Address**

Service Address Field cannot be added to this section

Billing Address Address

**Tax**

Field cannot be added to this section

**Field Properties** ×

Field label  
Phone

Api name  
Phone

Validation  
 Mandatory

Data Privacy  
 Contains personal data (PII)

Data Security  
 Encrypt data

🗑️ Delete

**Phone** ⋮

🗑️ Drop here to delete

To delete a custom field permanently:

From the **Unused fields** section, you can either retrieve the field or delete it permanently from the module. To retrieve the field, drag and drop it back to the desired section of the module. To delete the field permanently, click on the Delete [  ] icon, and click **Delete** in the confirmation message.

**Contacts** ▾ Cancel Save

New Fields Unused fields ⓘ You have unsaved changes in this page. Click 'Save' to save these changes.

Description

Home Phone

Other Phone

Type

Drop here to delete

**Fields**

**Contact Details**

|             |             |   |
|-------------|-------------|---|
| Salutation  | Pick List   | ⋮ |
| First Name  | Single Line | ⋮ |
| Last Name * | Single Line | ⋮ |
| Email *     | Email       | ⋮ |
| Company     | Lookup      | ⋮ |
| Mobile      | Phone       | ⋮ |
| Phone       | Phone       | ⋮ |

**Address**

|                 |         |   |
|-----------------|---------|---|
| Service Address | Address | ⋮ |
| Billing Address | Address | ⋮ |

**Field Properties** ×

Field label  
Phone

Api name  
**Phone**

Validation  
 Mandatory

Data Privacy  
 Contains personal data (PII)

Data Security  
 Encrypt data

If a field is associated with a workflow rule, or field update, then the field cannot be deleted.

**Unable to remove this field**

This field 'Designation' is used in the following places. Remove the dependencies and then try to remove the field.

Refresh

**Field Updates**

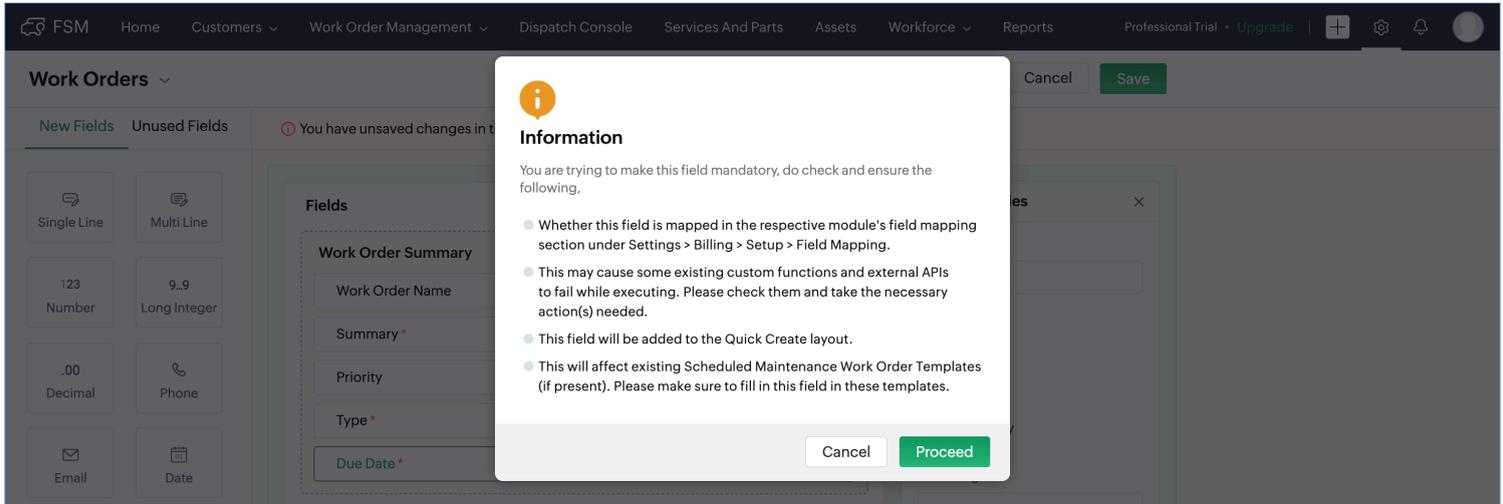
- Set Designation

Ok

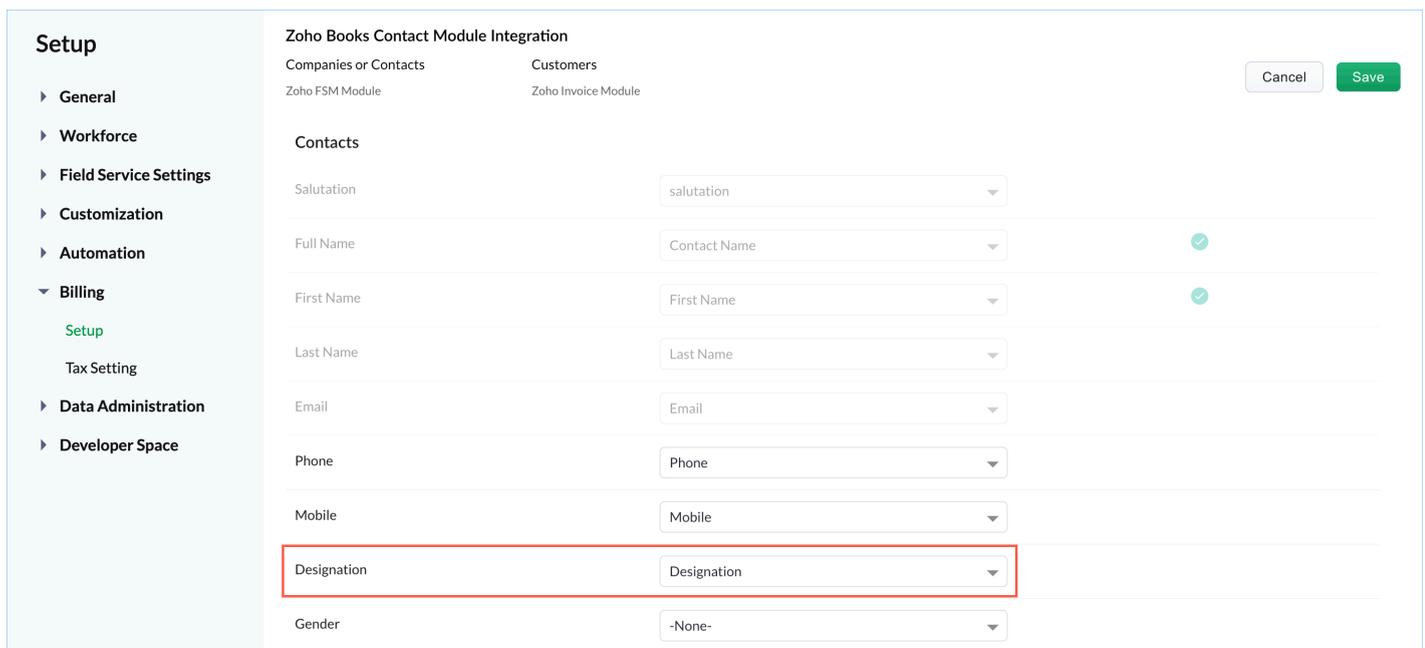
## Mandatory Validation

### Adding the mandatory validation

When the mandatory validation is added to a field, the following features will be affected and you need to take appropriate actions:



- In the **Field Mapping** for the FSM-Invoice/Books integration, ensure that the FSM field marked as mandatory is mapped to a field in Invoice/Books.



- If the field now marked as mandatory has been used in custom functions, or integrations involving FSM REST APIs, then their functioning will be impaired. You might need to revisit them and make the necessary changes.
- The field marked mandatory will be added to the Quick Create layout.

The screenshot shows a search interface with the following elements:

- Asset**: Search input field with the text "Search Asset".
- Address**: Search results list.
- Territory**: Search results list.
- Service Address**: Search results list.
- Search Results**:
  - 2 Ton 5 Star Split AC | MS-Q02YLZA
  - Sony Security camera
  - + Create New (highlighted with a red circle)

- If the mandatory validation is added to a field in the Work Orders module, then it might affect any existing [work order templates](#) you have created for scheduled maintenance plans.

## Removing the mandatory validation

While removing the mandatory validation for a field, you have the option to remove it from the Quick Create layout. Select the **Also, remove this field from the Quick Create layout** checkbox if you want to remove the field from the Quick Create layout.

The confirmation dialog box contains the following information:

- Icon**: Information icon (i).
- Title**: Confirm ?
- Message**: This field will be marked as non-mandatory.
- Checkbox**:  Also, remove this field from the Quick Create layout
- Buttons**: Close, Proceed

## Other Info section

The custom fields will be displayed in the **Other Info** section of the *[Module] Details* page in the web app.

FSM Home Customers Work Order Management Dispatch Console Services And Parts Assets Workforce Standard Trial Upgrade

Work Orders WO86  
House painting  
In Progress Service Invoiced Jane Rizzoli Complete Work Edit

Preference  
 Preferred Date 1 Jan 12, 2023  
 Preferred Date 2 Jan 13, 2023  
 Preferred Time Any time  
 Preference Note --

**Other Info**  
 Create and Send Invoice true

Owner  
Jane Rizzoli

Created By  
Jane Rizzoli  
on Jan 11, 2023 03:36 PM

Modified By

Timeline Service and parts **Appointments** Notes Related list Invoices

**Service Appointments**  
View, manage, schedule and dispatch service appointments to the field technicians.

| Appointment Name       | Total     | Status    | Actual Start Time     | Actual End Time       |
|------------------------|-----------|-----------|-----------------------|-----------------------|
| AP-4<br>House painting | \$ 241.82 | Completed | Jan 11, 2023 03:37 PM | Jan 11, 2023 07:39 PM |

In the mobile app, the custom fields will be displayed in the **Other Info** section under the **Overview** tab of the [Module] Details page.

OVERVIEW SERVICE AND PARTS SERVICE TA

Email  
[john.serrano@gmail.com](mailto:john.serrano@gmail.com)

Billing Address  
Billing Address, 99 Common St, Watertown, Massachusetts, United States, 02472

Phone  
[111-111-1111](tel:111-111-1111)

Preference  
 Preferred Date 1  
12 Jan 2023  
 Preferred Date 2  
13 Jan 2023  
 Preferred Time  
Any time  
 Preference Note  
-

**Other Info**  
 Create and Send Invoice