



Essentials of Zoho FSM

Key Terms

[Crew](#)

A crew consists of several field agents who are grouped together to conduct a specific task. Each crew is assigned a lead.

[Dispatch Console](#)

The scheduling tool from which the service appointments are scheduled and dispatched by users with the Dispatcher profile. The Gantt and Map views provide the users with all the information about the service appointments and available field agents.

[Estimate](#)

Provides a ballpark figure for how much it would cost to provide the services asked for in a request.

[Field Agents](#)

Conduct the requested field services at the contact location. Each field agent has territories associated with them where they are assigned appointments to work on.

[Mobile App](#)

The **Zoho FSM mobile app** (available on both the iOS and Android) is a handy application for the field agents to receive notifications about their assigned tasks, as well as to update their status on the fly.

[Requests](#)

They are initiated to requisition services.

[Service Appointments](#)

Jobs created for carrying out the services in a work order. These service appointments are assigned to field agents or crews who will then render the services at the contact location.

Service Territories

Domains that can be geographical, departmental, commercial, or based on any other way you want to segment your business. This demarcation helps you manage contact service requests and service personnel.

Skills

Skills refer to the professional abilities and competencies that the field agents and crews possess to perform their job duties effectively. When a work order is created, the skills required to accomplish the work order are added.

Work Order

A record created for executing a contact service request. Information from the contact requests is used to create the work order.