



Exporting Data from Zoho FSM

You can export the data in select modules of FSM to a CSV file. Along with the module data, you can also export data related to the module, such as Notes, and Addresses.

- You can export data from the **Contacts, Companies, Assets, Requests, Services And Parts, Estimates, Work Orders, Time Off, and Service Appointments** modules.
- The data will be exported in a **CSV** file.
- The following table lists the related details that are implicitly included in the export of the respective modules:

Module Name	Related Data
Services And Parts	Service Tasks
Work Orders	Services, Parts, Service Tasks, Skills
Service Appointments	Time Sheets, Services, Service Resources

Permission Required: [Export](#)

Export Limits

1. In a single export, a maximum of 10,000 records can be exported from a module. The first created 10000 records from a module will be exported.
2. A maximum of 5000 records of the related data (Notes, Addresses) can be exported in a single export.
3. A maximum of three exports can be run simultaneously.

Export Data

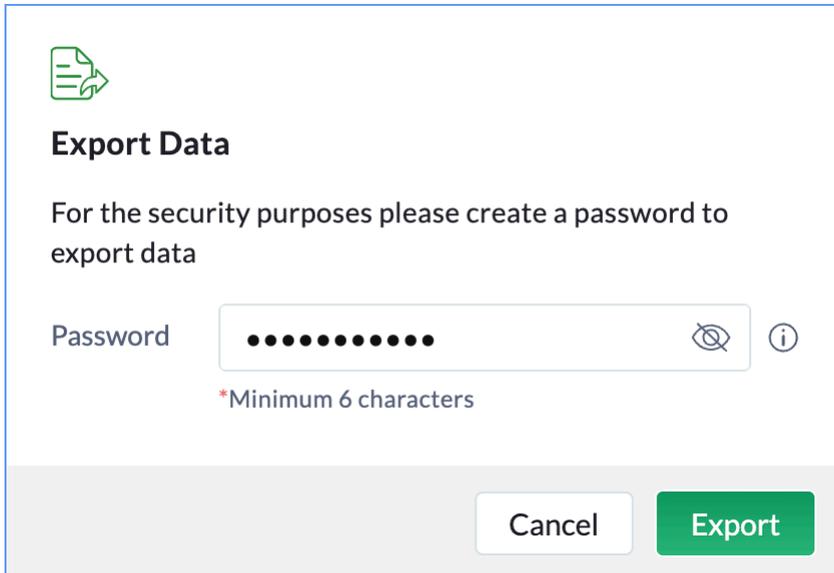
To export data from FSM:

1. Navigate to **Setup > Data Administration > Data Export**.
2. Provide the following details and click **Export**:
 - a. **Select the module to export:** The module whose data you want to export
 - b. **Select related module:** The related data (Notes, Addresses) of a module you want to export
 - c. **Include PII:** Select this checkbox to include the Personal Identification Information.
You can configure the PII property in the [module builder](#).

d. **Send to:** The details of the export will be sent to this email address. If the export is successful, then the email will contain the CSV file with the export data.

3. Click **Okay** in the confirmation message.

If you have enabled the feature control **Password protect exported files (Setup > Field Service Settings > Other Settings)**, then you will be prompted to set a password for your export file. In the *Export Data* popup, enter a password and click **Export**.



Export Data

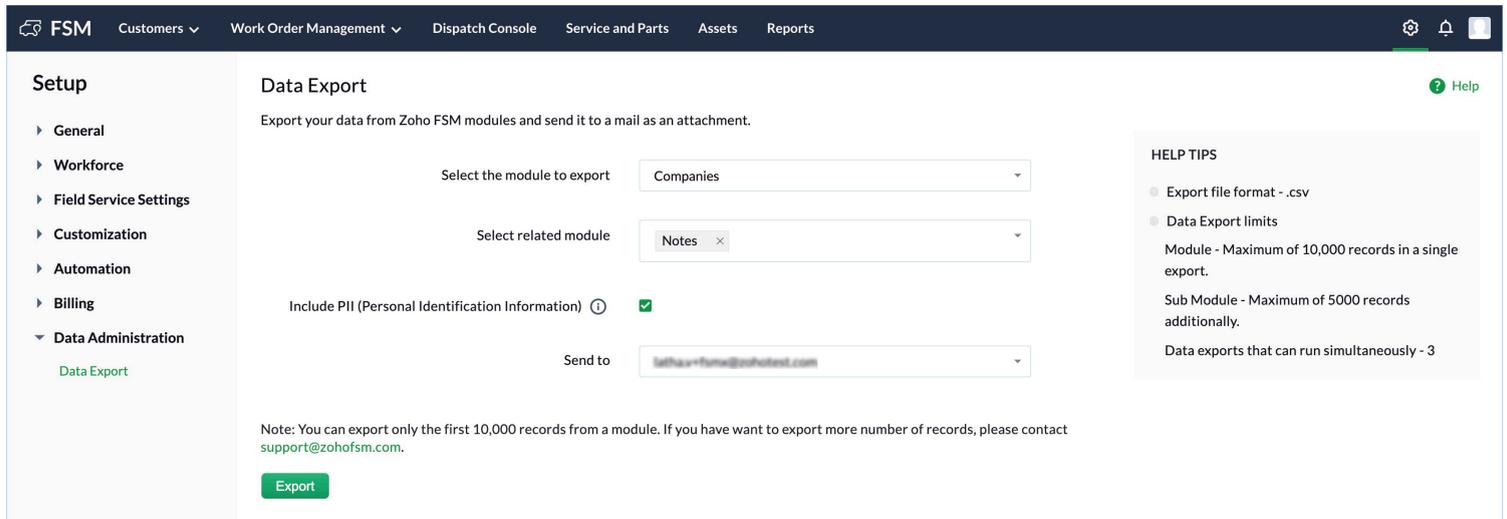
For the security purposes please create a password to export data

Password  

*Minimum 6 characters

Cancel **Export**

You can check for the status of the export under **Data Export - History**.



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

Setup

- General
- Workforce
- Field Service Settings
- Customization
- Automation
- Billing
- Data Administration
 - Data Export

Data Export Help

Export your data from Zoho FSM modules and send it to a mail as an attachment.

Select the module to export: Companies

Select related module: Notes

Include PII (Personal Identification Information)

Send to: zohofsm@zohofsm.com

Note: You can export only the first 10,000 records from a module. If you have want to export more number of records, please contact support@zohofsm.com.

Export

HELP TIPS

- Export file format - .csv
- Data Export limits
 - Module - Maximum of 10,000 records in a single export.
 - Sub Module - Maximum of 5000 records additionally.
 - Data exports that can run simultaneously - 3

Data Export History

The status of the exports can be viewed under **Data Export - History**. Click **Refresh** to reload the data under Data Export - History.

Data Export - History

 Refresh

Module	Related Modules	Email	Exported On	Status
Requests	Notes	lathav+fsm@zohotest.com	11 Jan,2022 01:21 PM	Scheduled
Contacts	Addresses	lathav+fsm@zohotest.com	11 Jan,2022 01:19 PM	Failed
Companies	Notes,Addresses	lathav+fsm@zohotest.com	11 Jan,2022 01:19 PM	Failed
Contacts	—	lathav+fsm@zohotest.com	11 Jan,2022 01:04 PM	Completed
Contacts	Notes	lathav+fsm@zohotest.com	11 Jan,2022 01:02 PM	Completed
Contacts	—	lathav+fsm@zohotest.com	05 Jan,2022 03:46 PM	Completed
Assets	—	lathav+fsm@zohotest.com	05 Jan,2022 03:45 PM	Completed
Companies	—	lathav+fsm@zohotest.com	05 Jan,2022 03:14 PM	Completed
Companies	Notes	lathav+fsm@zohotest.com	05 Jan,2022 03:12 PM	Completed