



Standard Reports

ⓘ Permission Required: [Reports](#)

A report will only include data from records for which the user has View permission.

List of Reports

Select the **Reports** menu to view the following out-of-the-box FSM reports:

Report Name	Description
Field Technicians - Timesheet	This report summarizes the time spent by each field agent working on appointments assigned to them
Field Technicians - Time Off	This report contains details of the time taken off by the users and the reason for it
Appointment Based on Status	This report categorizes the appointments based on its status
Field Technician - Check in/out	This report lists the details of user's check-in and check-out from the mobile app
Work Order by Type	This report classifies the work orders based on its type, i.e. Service or Inspection
Customer Rating and Feedback	With this report, you can see the details of the customer ratings and feedback given for each appointment
Work Order by Priority	This report classifies the work orders based on its priority, i.e. Critical, High, Medium, Low
Work Order by Status	This report categorizes the work orders based on its status, i.e New, In Progress, Cannot Complete, Completed, Closed, Cancelled, Scheduled Appointment, and Dispatched
Trips	This report contains details of the trips taken by the field agents for their assigned appointments

Company's Address Information	This report lists the details of the Companies' service and billing addresses
Company Primary Address Information	This report lists the details of the Companies' billing addresses
Contact's Address Information	This report lists the details of the Contacts' service and billing addresses
Services provided to the Customers	This report lists the services available and the appointments in which they are used.
Cancelled/Terminated Services	List of Services cancelled or terminated
Parts Used or Utilized	This report lists the Parts that have been used in Closed work orders. The number of the Closed work orders the Part have been used in will also be mentioned alongside the Part name.
Terminated Appointments	List of appointments terminated or unable to complete by the field agent/crew due to various reasons, e.g. part unavailable, bad weather
Cancelled Appointments	List of Appointments cancelled by the customer due to various reasons (e.g. customer unavailable)
Estimate Based on Status	This report classifies the estimates based on its status, i.e. New, Approved, Rejected, Cancelled, Waiting For Approval, Converted to Work Order, and Expired
Rejected Estimate by Rejected Reason	This report lists the details of the Estimates created and the reasons for which they were rejected
Requests by Monthly	This gives a monthly report of the requests created
Request Based on Request Source	This report categorizes the request based on the channels in which they originated, i.e. web, email, etc
Request Based on Status	This report classifies the requests based on its status, i.e. New, Estimate Created, Estimate Rejected, Work In Progress, Completed, Closed, Cancelled, Cannot Complete
Request Based on Priority	This report classifies the requests based on its priority, i.e. Critical, High, Medium, Low
Service Reports by Status	This report categorizes the service reports based on its status, i.e. Draft, Sent

Using Reports

To generate a report, select the relevant filters and click on **Apply**. The majority of reports have entries that are categorized and display the total number of records associated with each category. For instance, the Appointments Based on Status report groups records by appointment status and exhibits the number of appointments linked with each status. By clicking on a record, you can move to the details page.

Service Appointments Based on Status

Updated less than a minute ago

totalrecords: 10

Filters

Data & Time: Created Time, Last 12 Months, Jul 01, 2022, Jun 30, 2023

User: Created By, In, Lilly Rush

Apply Clear Filter

STATUS	COMPANY	CONTACT	APPOINTMENT NA...	SUMMARY	TOTAL (\$)	SCHEDULED STAR...	SCHEDULED END ...	A
Completed (5)	-	Jacob Peralta	AP-10	Home Painting	30.00	Jun 12, 2023 03:50 ...	Jun 12, 2023 03:55 ...	J
	-	Jacob Peralta	AP-9	Home Painting	52.50	Jun 12, 2023 03:45 ...	Jun 12, 2023 03:50 ...	J
	-	Jacob Peralta	AP-8	Plumbing	52.50	Jun 12, 2023 03:40 ...	Jun 12, 2023 03:45 ...	J
	-	Jacob Peralta	AP-5	Plumbing	52.50	May 26, 2023 04:00...	May 26, 2023 05:00...	N
	-	Jacob Peralta	AP-4	Home Painting	131.51	May 25, 2023 11:00...	May 25, 2023 11:30...	J
Dispatched (5)	Endeavour Inc.	Edward Cormoran	AP-12	Home painting	52.50	Jun 29, 2023 03:00 ...	Jun 29, 2023 04:00 ...	-
	-	Amy Santiago	AP-7	Plumbing	37.88	Jun 11, 2023 12:30 ...	Jun 11, 2023 01:30 ...	-
	Acme Inc	Lucy Robins	AP-6	Snow removal	52.50	Jun 11, 2023 11:15 ...	Jun 11, 2023 12:00 ...	-
	-	Amy Santiago	AP-3	Home Painting	131.51	May 25, 2023 06:00...	May 25, 2023 06:10...	-
-	Endeavour Inc.	Edward Cormoran	AP-2	Home painting	131.51	Mar 12, 2023 12:00...	Mar 12, 2023 01:00...	-

The data in the reports is automatically refreshed every three hours. You can also manually refresh the data using the **Refresh** [🔄] icon at the top.

Note: You can view a maximum of 2000 records in a report. If case you want to view more than 50000 records, then you can [export](#) a Detailed Report.

Export Report

You can export the data in a Zoho FSM report to a file (Excel, CSV, PDF). To export a report:

1. Select the **Reports** menu.
2. Click on a report.
3. Click **Export** in the top right corner.

Service Reports by Status

totalrecords : 3

Filters: Created Time, Last 12 Months, Mar 01, 2022, Feb 28, 2023, Apply, Clear Filter

STATUS	APPOINTMENT	SERVICE REPORT NAME	PROBLEM STATEMENT	SERVICE SUMMARY	TOTAL (\$)
Draft (3)	AP-1 (1)	REP-1	TV Installation	-	1,200.00
	AP-2 (1)	REP-2	TV Installation	-	1,200.00
	AP-4 (1)	REP-3	TV Installation	-	200.00

Export

4. In the *Export Report - <Report Name>* dialog, do the following and click **Export**:

- Choose Export Type:** Choose whether you want the report with or without the grouping of row/column.
- Choose File Format:** Choose whether you want to export the file in the Excel, CSV, or PDF format. The formats available will depend on the export type you choose.
- Set a password for your export file, if you have enabled the feature control [Password protect exported files](#) (**Setup > Field Service Settings > Other Settings**).
- Include PII:** Select this checkbox to include the Personal Identification Information. You can configure the PII property in the [module builder](#). Click [here](#) to know how PII data is handled in Zoho FSM.

Export Report - Contact's Address Information

Choose Export Type:

Formatted Report
Export the report with the current view including group information. Maximum of 2000 rows can be exported.

Detailed Report
Export detailed report and include all rows. This will export without the grouping of row/column. A maximum of 50,000 rows can be exported. Select this option if you would like to do further calculations in the report data.

Choose File Format:

Excel PDF CSV

Include PII (Personal Identification Information)

Password
*Minimum 6 characters

Include PII

In a report, if the PII data is used in row/column grouping, and if you choose to not include PII data in the exported report, then you cannot export it as a Formatted Report. You will be automatically directed to export the Detailed Report.

Export Report - Work Order by Priority

Choose Export Type:

Formatted Report
Export the report with the current view including group information. Maximum of 2000 rows can be exported.

Detailed Report
Export detailed report and include all rows. This will export without the grouping of row/column. A maximum of 50,000 rows can be exported. Select this option if you would like to do further calculations in the report data.

Choose File Format:

Excel CSV

Include PII (Personal Identification Information)

Cannot export formatted report, personal fields are used in the group information. Click export to get detailed report.

Password  

*Minimum 6 characters

Email Report

You can email a Zoho FSM report to the users in your organization. The report will be sent as an attachment (Excel, CSV, PDF).

To email a report:

1. Select the **Reports** menu.
2. Click on a report.
3. Select **Send Email** from the Export menu.

Service Reports by Status

totalrecords : 3

Filters: Created Time, Last 12 Months, Mar 01, 2022, Feb 28, 2023, Apply, Clear Filter

STATUS	APPOINTMENT	SERVICE REPORT NAME	PROBLEM STATEMENT	SERVICE SUMMARY	TOTAL (\$)
Draft (3)	AP-1 (1)	REP-1	TV Installation	-	1,200.00
	AP-2 (1)	REP-2	TV Installation	-	1,200.00
	AP-4 (1)	REP-3	TV Installation	-	200.00

Show Details

4. In the *Mail Sending Options* dialog, do the following and click **Send**:

a. Select **Recipients**.

You can choose the users in your organization. You can either select the users by their name or select a role. When you select a role, email will be sent to all the users with that role (profile).

b. Include **Additional Recipients**, if required.

You can add any email address here.

c. **Export file as**: Choose whether you want to export the file in the Excel, CSV, or PDF format. The formats available will depend on the export type you choose.

d. Choose the **Send Options**.

e. Set a **Password**.

If you have enabled the feature control [Password protect exported files](#) (Setup > Field Service Settings > Other Settings), then you need to set a password for your export file.

f. **Include PII**: Select this checkbox to include the Personal Identification Information.

You can configure the PII property in the [module builder](#). In a report, if the PII data is used in row/column grouping, and if you choose to not include the PII data, then you cannot email the report.

Mail Sending Options

Recipients:

Additional Recipients:
(Use commas to separate email addresses.)

Export file as:

Send Options:

Include PII (Personal Identification Information)

Password: *Minimum 6 characters

