



Job Sheets

Job Sheets are customizable, reusable forms that serve as a checklist for the services that technicians need to carry out and as a tool for data collection. While on location, the checklists and instructions within the job sheet guarantee that the services are performed accurately and efficiently. Technicians can update job sheets in real-time using the mobile app. Once all the activities are carried out, they can attach photos of the work done and also include their observations. This documentation serves as a reliable record that can be referenced later.

A typical job sheet will have one or more of the following sections:

- **Pre-Job Checklist:** Ensures all preparations are made before starting the job. Items may include verifying equipment, materials, and safety gear.
- **Instruction checklist:** A step-by-step breakdown of the job, allowing teams to track progress and ensure no step is missed.
- **Post-Job Checklist:** It is used to ensure that all necessary activities are completed after finishing a job. Items may include cleaning up the site, returning equipment, and obtaining a client sign-off.
- **Instructions/Safety guidelines:** Specific instructions related to the job, including safety protocols and best practices to follow.
- **Observations:** Areas for technicians to document their observations, record any insights, issues, and general comments related to the work performed.

Following are the benefits of using job sheets:

- **Consistent Service Delivery:** Job sheets help standardize processes and workflows, ensuring that all technicians follow the same procedures and protocols, resulting in consistent service delivery. Predefined checklists in job sheets allow for built-in quality control measures for all kinds of service, be it inspection, installation, or repair.
- **Superior Data Collection:** By providing a structured format for documenting job details, job sheets help minimize errors and omissions, leading to standardized data collection, ensuring that all technicians capture all the required information uniformly. It supports a variety of fields enabling users to capture different types of data.
- **Accountability, Compliance, and Safety:** Job sheets can include safety instructions and compliance requirements, ensuring that technicians are aware of necessary precautions and regulations while performing their job. Thus, organizations can ensure compliance with industry regulations and internal policies, thereby reducing liabilities. The uniformity of data collected also makes it easier to conduct audits and reviews.
- **Mobile Accessibility:** Using the mobile app, technicians can update job sheets in real-time while on-site, capturing vital information such as photos and diagnostic results. This immediacy enhances the accuracy of

the information collected and reduces the risk of errors associated with post-job data entry, also ensuring that all relevant data is immediately available in the system for office staff.

- **Training and Development:** By outlining standardized procedures, job sheets help new technicians learn the correct methods for completing their job. While on-site, they can quickly access important information, such as troubleshooting steps, safety protocols, and equipment specifications. This clarity helps reduce confusion and increases confidence.

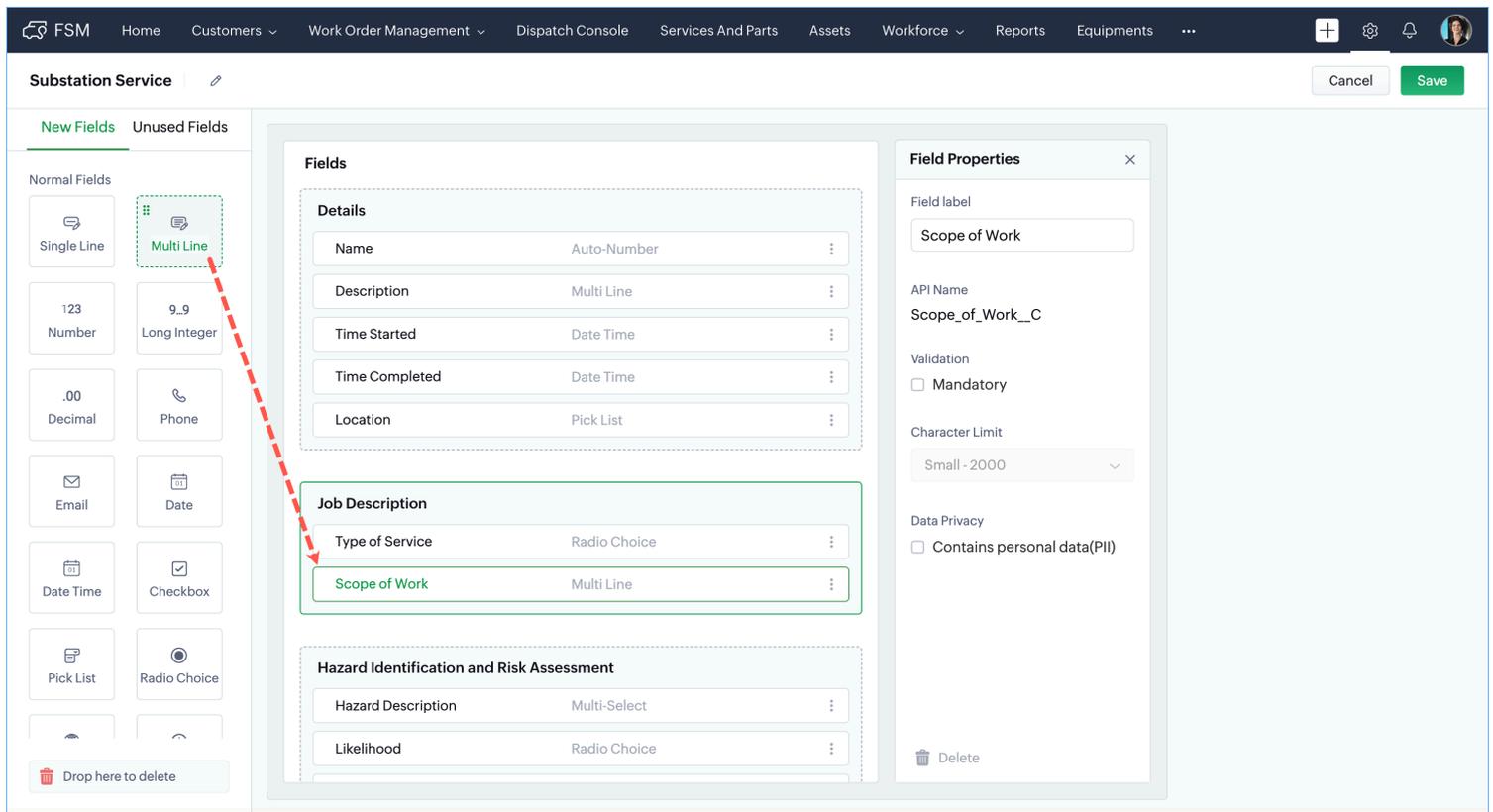
Create Job Sheets

- ① - **Permission Required:** [Modules Customization](#)
- Find out the Edition-specific limits for [Job Sheets](#)

To create a job sheet:

1. Navigate to **Setup > Customization > Job Sheets** and click **Create Job Sheet**.
2. Enter the following details, then click **Create**:
 - a. A **Name** for the job sheet
 - b. A **Description** of the job sheet
 - c. The [Services](#) you want to create the job sheet with.

All the job sheets associated with the services that are added to a service appointment will be available for use under the **job sheets** tab of that service appointment.
3. In the *Job Sheet Builder* page, drag and drop the fields you want from the *New Fields* tray.
 - a. Enter the properties for the field and click **Save**.
 - b. You can also drag and drop a new Section, provide a name for the section, add fields to the section, and click **Save**.



The table below lists the different types of fields that are supported.

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. You can add a maximum of hundred choices.

Radio Choice	Field to select one option from a predefined set of choices. You can add a maximum of five choices.
URL	Field for entering web address of a specific webpage or website
Currency	Field for entering monetary values
Multi-Select	Drop-down field that allows users to select multiple options. You can add a maximum of ten choices.
Check List	Comprises a list of items or tasks, each accompanied by a checkbox that can be marked as completed. You can add a maximum of ten items or tasks.
Image Upload	Field to upload images. In the Maximum images allowed property of this field, choose the number of images you wish to permit the user to upload. Up to five images can be permitted. The total size of the image files should not exceed 10 MB. The file types supported for images are .jpeg, .jpg, and .png.
Rating	Field that will allow users to record machine readings or calibrations.

 **Note:**

- Refer to the section **Limits for each field type in Job Sheets** in the [pricing](#) Help to know about the field limits.

Edit Services in a Job sheet

At any time, you can edit the services added to a job sheet. To do so:

1. Navigate to **Setup > Customization > Job Sheets** and hover over the job sheet whose services you want to edit.
2. From the **More Options** [⋮] icon, click **Edit Services**.
3. Add or remove the services and click **Save**.

The screenshot shows the 'Job Sheets' page in the FSM application. The left sidebar contains a 'Setup' menu with 'Job Sheets' highlighted. The main content area has a search bar and a 'Create Job Sheet' button. Below is a table with the following data:

Name	Description	Services	Last Modified	Status - All
Substation maintenance		Substation Equipment - Routine Maint...	28 Aug 2024 03:27 PM	<input checked="" type="checkbox"/>
Substation Service		Substation Equipment - Routine Maint...	28 Aug 2024 02:51 PM	<input checked="" type="checkbox"/>
Industrial Motor Field Services		Industrial Motor Field - Repair Service	21 Aug 2024 11:27 AM	<input checked="" type="checkbox"/>

Mark Job Sheet As Inactive

If you no longer want a job sheet to be in use, you can mark it as inactive. To do so:

1. Navigate to **Setup > Customization > Job Sheets** and hover over the job sheet you want to mark as inactive.
2. Toggle the **Status** button to disable it.

The screenshot shows the 'Job Sheets' page with the 'Substation Service' job sheet selected. A red arrow points to the status toggle switch, which is currently turned on. The table data is as follows:

Name	Description	Services	Last Modified	Status - All
Solar Panel Installation		Solar Panel Installation	19 Aug 2024 07:03 PM	<input checked="" type="checkbox"/>
Substation Service		Substation Equipment - Routine Maint...	20 Aug 2024 04:08 PM	<input checked="" type="checkbox"/>
Industrial Motor Field Services		Industrial Motor Field - Repair Service	21 Aug 2024 11:27 AM	<input checked="" type="checkbox"/>

If a job sheet that you mark as inactive is already being used in a service appointment, then you can continue using it if it has already been filled, i.e., the ones with the Draft and Completed statuses. The ones in the Yet To Start status will be removed. Refer to [this](#) section to know more about these statuses.

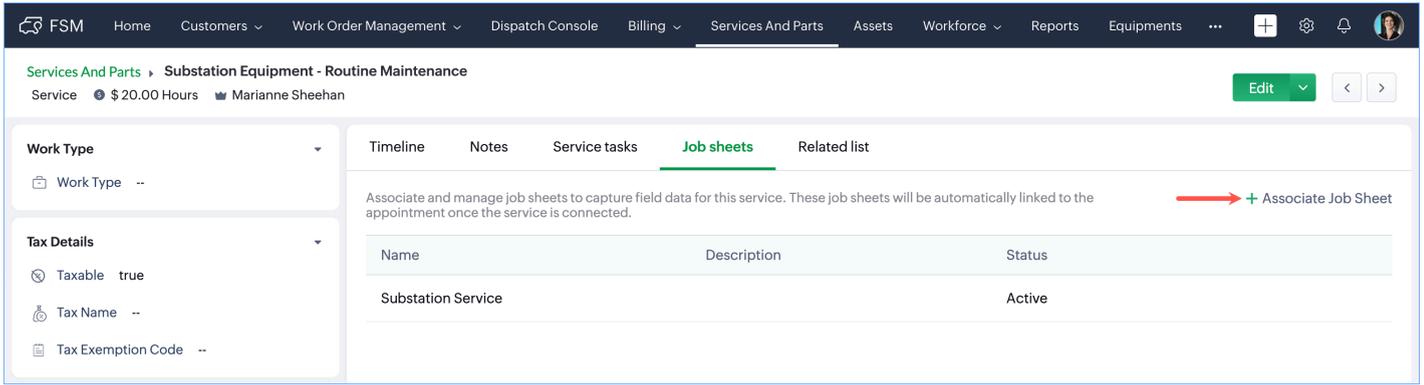
If there are five active job sheets, then any new ones created will be in the inactive status.

Associate Job Sheets to Services

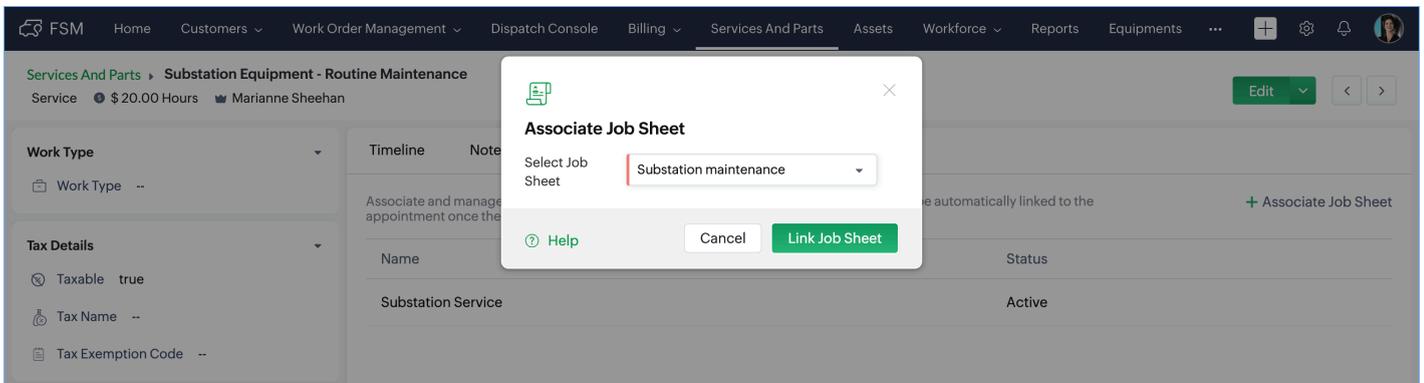
While [creating](#) a job sheet, you associate [services](#) to it. You can perform the same action from a service record. You can link the service to one or more job sheets. To do so:

1. Select the **Services And Parts** module.

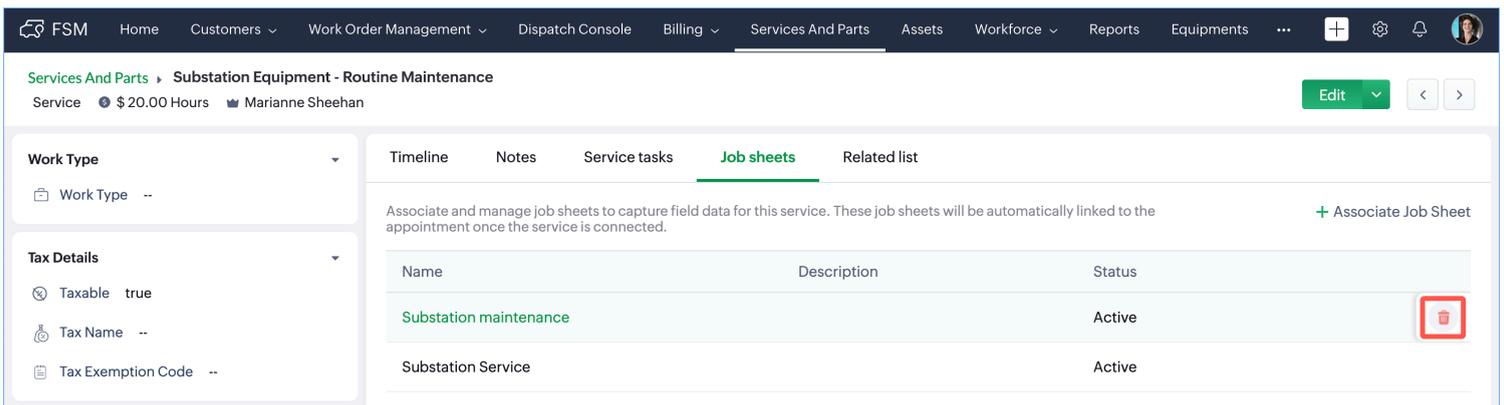
2. Click on the service you want to associate with a job sheet.
3. Under the **Job sheets** tab, click **Associate Job Sheet**.



4. Select a job sheet and click **Link Job Sheet**.



You can remove the job sheet to which you have associated the service by hovering over an entry and clicking on the **Delete** [🗑️] icon.



Using Job Sheets in Appointments

i - Permission Required: [Job Sheets](#)

All the job sheets associated with the services added to a service appointment will be listed as job sheet line items under the **Job sheets** tab. Starting from the first service in the service appointment, all the job sheets associated with each service will be added until the limit of 20 is reached. Consider this example for better understanding.

Two services, *Substation Equipment - Routine Maintenance*, and *Substation Equipment - Testing* are added to a service appointment.

The screenshot shows the 'Service Appointment Information' for 'Substation servicing' (WO51, AP-50). The appointment is for 1 hour, scheduled from 11:00 AM to 12:00 PM on August 30, 2024, and assigned to Marianne Sheehan. The 'Services and parts' tab is active, displaying a table of services:

Service Line Item Name	Service	Quantity	List Price	Tax Name	Line Item Amount
SVC-89 ⌚ Scheduled ⌚ Start Work 📄 Not yet Invoiced	Substation Equipment - Routine Maintenance	1 Hours	\$ 20.00	Sales Tax [5%]	\$ 21.00
SVC-90 ⌚ Scheduled ⌚ Start Work 📄 Not yet Invoiced	Substation Equipment - Testing	1 Hours	\$ 20.00	Sales Tax [5%]	\$ 21.00

Below the services table, the 'Parts' section shows 'No Records Found'.

These services have been added to some job sheets as depicted in the screenshots below.

The screenshot shows the 'Services And Parts' page for 'Substation Equipment - Routine Maintenance'. The 'Job sheets' tab is active, displaying a table of linked job sheets:

Name	Description	Status
Substation maintenance		Active
Substation Service		Active

The table is highlighted with a red border. The page also shows 'Tax Details' (Taxable: true) and 'Books Information' (Record not linked yet).

Services And Parts > Substation Equipment - Testing

Service \$20.00 Hours Marianne Sheehan

Work Type: Work Type --

Tax Details: Taxable true, Tax Name --, Tax Exemption Code --

Books Information: Record not linked yet

Owner: Marianne Sheehan

Created By: Marianne Sheehan on 20 Aug 2024 04:21 PM

Timeline Notes Service tasks **Job sheets** Related list

Link Service to Job Sheet + Link Service to Job Sheet

Name	Description	Status
Substation maintenance		Active
Substation Service		Active
Industrial Motor Field Services		Active
Substation Equipment Emergency Repair		Active
Substation Equipment Testing		Active

Under the **Job sheets** tab of the service appointment, a total of seven job sheet line items will be added, two for the service *Substation Equipment - Routine Maintenance*, and five for *Substation Equipment - Testing* and in that order.

Service Appointments > WO51 > AP-50

Substation servicing

Dispatched Maintenance Not yet Invoiced Marianne Sheehan 1 Hr

Start Work Edit

Service Appointment Information: Service(s) Substation Equipment - Routine Maintenance (SVC-89), Substation Equipment - Testing (SVC-90)

Scheduled Time: 30 Aug 2024 11:00 AM, 30 Aug 2024 12:00 PM

Scheduled Duration: 01:00:00 (HH:mm:ss)

Actual Time: Service Appointment not yet started

Assigned Service Resources: Marianne Sheehan (Lead)

Contact Details

Timeline Services and parts **Job sheets** Time sheets Service reports Trips Notes

Job Sheets
View and manage the job sheets of the Appointment

Name	Description	Status	Service Details	Created By	Created Time
Substation Service	--	Yet to Start	Substation Equipment - Routine Mai...	--	--
Substation maintenance	--	Yet to Start	Substation Equipment - Routine Mai...	--	--
Substation maintenance	--	Yet to Start	Substation Equipment - Testing (SV...	--	--
Substation Service	--	Yet to Start	Substation Equipment - Testing (SV...	--	--
Industrial Motor Field Services	--	Yet to Start	Substation Equipment - Testing (SV...	--	--
Substation Equipment Emergency R...	--	Yet to Start	Substation Equipment - Testing (SV...	--	--
Substation Equipment Testing	--	Yet to Start	Substation Equipment - Testing (SV...	--	--

You can perform the following activities on the job sheet line items of a service appointment:

- Fill out the details
- Save it as draft
- Save it as completed

Fill out the details

Initially, the status of the job sheet will be **Yet To Start**. Click on **Start Filling** to fill out the necessary details.

The screenshot shows the FSM interface for a service appointment. The 'Job sheets' tab is active, displaying a table with one entry: 'Substation Service' with a status of 'Yet To Start'. A red arrow points to the 'Start Filling' button in the top right corner of the table row. The left sidebar shows service appointment details, including the service name 'Substation Equipment - Routine Maintenance (SVC-77)', scheduled time '21 Aug 2024 09:00 AM', and assigned resource 'Marianne Sheehan (Lead)'. The top navigation bar includes 'FSM', 'Home', 'Customers', 'Work Order Management', 'Dispatch Console', 'Services And Parts', 'Assets', 'Workforce', 'Reports', and 'Equipments'.

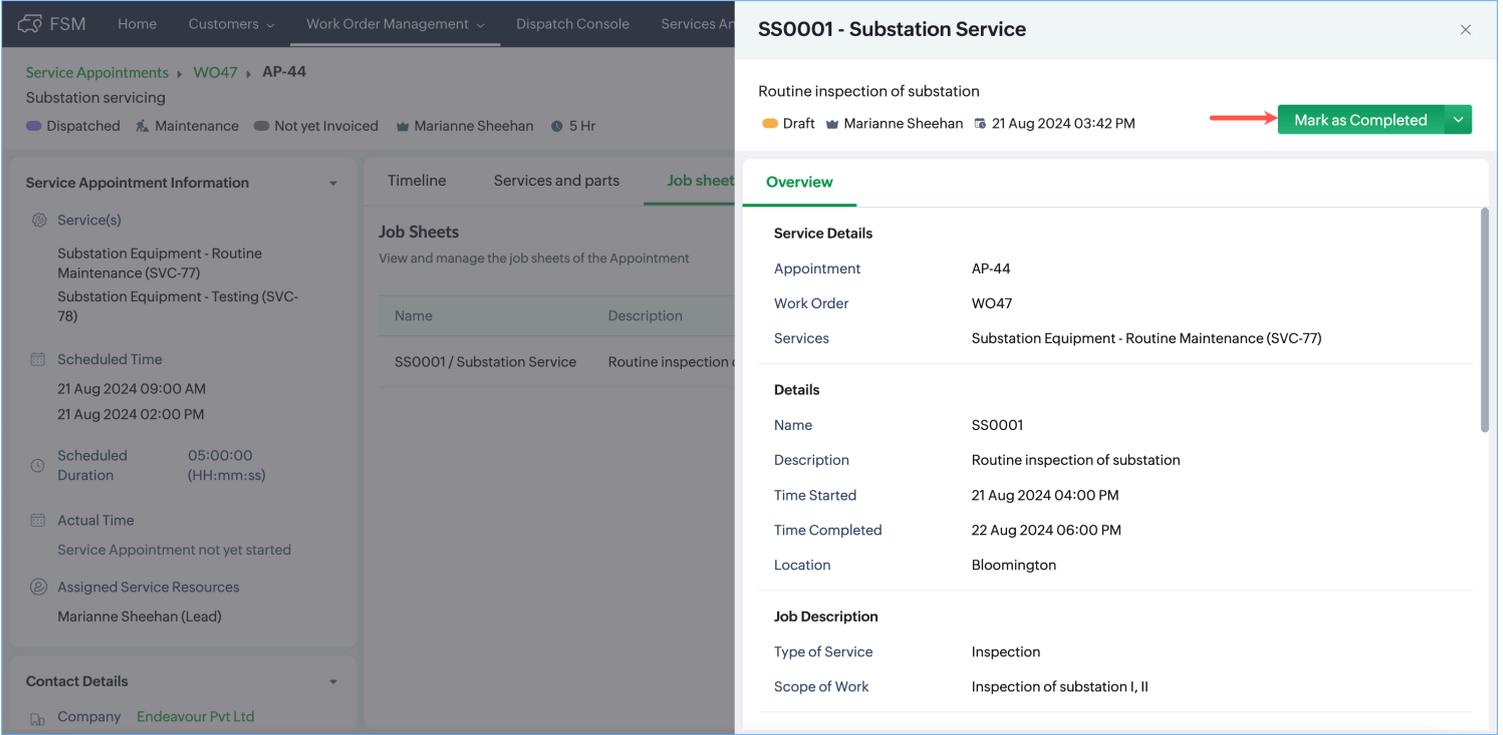
Save it as draft

After filling out the details, you can either **Save as Draft** or **Save as Completed**. If you save it as draft, the status will change to **Draft**. You can also perform this action by hovering over an entry and clicking **Mark as Draft** from **More Options** [:].

The screenshot shows the 'Substation Service' form in the FSM interface. The form is divided into several sections: 'Details' with fields for Description ('Routine inspection of substation'), Time Started ('21 Aug 2024' at '04:00 PM'), Time Completed ('22 Aug 2024' at '06:00 PM'), and Location ('Bloomington'); 'Job Description' with radio buttons for 'Routine Maintenance', 'Emergency Repair', 'Inspection' (selected), and 'Testing', and a 'Scope of Work' field ('Inspection of substation I, II'); and 'Hazard Identification and Risk Assessment' with a 'Hazard Description' dropdown ('Electrical Shock'), 'Likelihood' radio buttons ('High', 'Medium' selected, 'Low'), and 'Severity' radio buttons ('Critical'). At the bottom right, there are three buttons: 'Cancel', 'Save as Draft' (highlighted with a red arrow), and 'Save as Completed'. The background shows the same FSM interface as the previous screenshot, but dimmed.

Save it as completed

You can later change its status to **Completed** by clicking on **Save as Completed**. You can also perform this action by hovering over an entry and clicking **Mark as Completed** from **More Options** [:].



The screenshot displays the Zoho FSM interface for a 'Substation Service' job sheet. The main panel shows the job sheet details, including the appointment name 'Routine inspection of substation', status 'Draft', assigned resource 'Marianne Sheehan', and creation time '21 Aug 2024 03:42 PM'. A red arrow points to a green 'Mark as Completed' button in the top right corner of the job sheet details panel. The left sidebar shows the appointment information, including the service name 'Substation Equipment - Routine Maintenance (SVC-77)', scheduled time '21 Aug 2024 09:00 AM', and assigned service resources 'Marianne Sheehan (Lead)'. The bottom of the sidebar shows contact details for 'Endeavour Pvt Ltd'.

Even after marking it as complete, you can revert the status to Draft.

After you have filled a job sheet line item and saved it, then an ID will be generated for it. The entries will be sorted in the order Yet to Start, Draft, and Completed.

FSM Home Customers Work Order Management Dispatch Console Billing Services And Parts Assets Workforce Reports Equipments

Service Appointments > WO47 > AP-44
Substation servicing

Dispatched Maintenance Not yet Invoiced Marianne Sheehan 5 Hr

Start Work Edit

Service Appointment Information

Service(s)
Substation Equipment - Routine Maintenance (SVC-77)

Scheduled Time
21 Aug 2024 09:00 AM
21 Aug 2024 02:00 PM

Scheduled Duration 05:00:00 (HH:mm:ss)

Actual Time
Service Appointment not yet started

Assigned Service Resources
Marianne Sheehan (Lead)

Contact Details

Company Endeavour Pvt Ltd
Contact Lucy Robins
Email lucy.robins@zylker.com

Timeline Services and parts Job sheets Time sheets Service reports Trips Notes

Job Sheets
View and manage the job sheets of the Appointment

Name	Description	Status	Service Details	Created By	Created Time
Substation maintenance	--	Yet to Start	Substation Equipment - Routine...	--	--
Industrial Motor Field Services	--	Yet to Start	Substation Equipment - Routine...	--	--
Substation Equipment Emerge...	--	Yet to Start	Substation Equipment - Routine...	--	--
SET0001 / Substation Equipme...	--	Draft	Substation Equipment - Routine...	Marianne Sheehan	28 Aug 2024
SS0001 / Substation Service	Routine inspection of substation	Completed	Substation Equipment - Routine...	Marianne Sheehan	21 Aug 2024

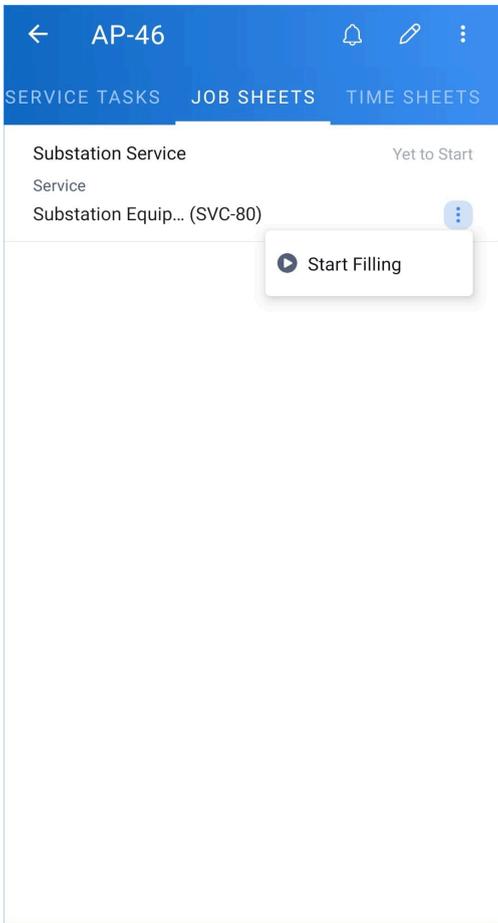
The following table details how the job sheet line items in a service appointment will be handled in different scenarios.

Scenario	Status is Yet to Start	Status is Draft/Completed
Service is removed or disassociated from a job sheet	Removed from service appointment	Retained in service appointment
Service line item is delinked from the appointment or deleted from work order	Removed from service appointment	Removed from service appointment
The Service record is deleted	Removed from service appointment	Retained in service appointment

Using Job Sheets in the Mobile App

To use job sheets in the mobile app:

1. Log in to Zoho FSM mobile app.
2. Select the Job Sheets tab within the service appointment you want to use.
3. Click **Start Filling** from the **More Options** [:] for a job sheet entry.



4. You can either **Save as Draft** or **Save as Completed**.

← Create Substation Service

Details

Description	Routine inspection of substation	
Time Started	27 Aug 2024, 04:09 PM	
Time Completed		
Location	Bloomington	▼

Job Description

Type of Service	Inspection	▼
Scope of Work		

Hazard Identification and Risk Assessment

Hazard Description	Select	▼
	Electrical Shock	×
Likelihood	Medium	▼
Severity	Major	▼

Tasks To Be Performed

Save as Draft Save as Completed

5. You can later change its status to Completed by clicking on **Mark as Completed**.

← Edit Substation Service

Details

Description	Routine inspection of substation	
Time Started	27 Aug 2024, 04:09 PM	
Time Completed		
Location	Bloomington	▼

Job Description

Type of Service	Inspection	▼
Scope of Work		

Hazard Identification and Risk Assessment

Hazard Description	Select	▼
	Electrical Shock	×
Likelihood	Medium	▼
Severity	Major	▼

Tasks To Be Performed

Save Save as Completed

Download/Print Job Sheets

i - **Permission Required:** Download/Print of [Job Sheets](#)

The option to download a job sheet as a PDF or print it will be available once it is in the **Draft** status.

The screenshot displays the Zoho FSM interface for a service appointment. The main window shows details for 'SS0001 - Substation Service' in a 'Draft' status. A red arrow points to the 'Download' button, which has a dropdown arrow next to it. Below the 'Download' button, a 'Print' dropdown menu is visible. The 'Mark as Completed' button is also present. The interface includes sections for 'Service Details', 'Details', and 'Job Description'.

Service Details	
Appointment	AP-44
Work Order	WO47
Services	Substation Equipment - Routine Maintenance (SVC-77)

Details	
Name	SS0001
Description	Routine inspection of substation
Time Started	--
Time Completed	22 Aug 2024 06:00 PM
Location	Bloomington

Job Description	
Type of Service	Routine Maintenance
Scope of Work	Inspection of substation I, II

Sample Job Sheets

Job sheets in Zoho FSM can be customized to suit any industry. Below are some sample job sheets.

HVAC Preventive Maintenance Checklist

HVAC Preventive Maintenance Checklist



Details

Description

Service Date

Asset Information

Asset Type

Asset ID/Number

- Service Agreement Validity
- One Year - 2 Tune-ups
 - Two Years - 4 Tune-ups
 - Three Years - 6 Tune-ups

Services Included in Agreement

-
-

Pre-Job Checklist

- Pre-Job Checklist
- Gather necessary tools and equipment
 - Check inventory of replacement parts (filters, belts, etc.)
 - Ensure personal protective equipment (PPE) is available

Instructions

Ducts and coils cleaned? Yes
 No

Air paths unobstructed? Yes
 No

Note locations of blocked air paths, or diffusers

Controls operating properly? Yes
 No

Air volume correct? Yes
 No

Drain pans clean? Yes
 No

Any visible growth or odors? Yes
 No

Record Refrigerant Level ☆☆☆☆☆

Capture any parts replaced or repairs made

Post-Job Checks

- Post-Job Checklist
- Clean up the work area
 - Dispose of any waste materials properly
 - Schedule next preventive maintenance visit

Obtained client sign-off

Observations

Cancel

Save as Draft

Save as Completed

Pool Cleaning Checklist

Pool Cleaning Checklist



Details

Description

Conducted on

Pool Type

Pool Size

Water Tests

Chlorine reading PPM (3-5 PPM)

Ph reading (7.2 - 7.6)

Calcium hardness reading (190 - 280)

Total alkalinity reading (90 - 150)

Tasks To Be Performed

Pool equipments checked for leaks

Capture images of pool

- To-Do
- Skim surface debris
 - Vacuum pool floor
 - Brush walls and steps
 - Brush tile line

Cleaned out skimmers Yes
 No
 N/A

Cleaned out pump baskets Yes
 No
 N/A

Cleaned or back washed filter Yes
 No
 N/A

CPR sign clearly readable and visible?

Filter shed and pool clean and rubbish free?

Post Clean-Up Checklist

Calling card left onsite at conclusion of service? Yes
 No
 N/A

Capture images of cleaned pool

Cancel

Save as Draft

Save as Completed

Low Water Pressure Repair Job Sheet

Low Water Pressure Repair Job Sheet

Details

Description

Date

Initial Assessment

Identify Affected Areas

Check for Recent Changes

Clogged Aerators Present?

Mineral Buildup On Showerheads?

Main Water Valve Status Fully Open
 Partially Open
 Closed

Pressure Regulator Status Functioning
 Not Functioning

Testing Water Pressure

Initial Pressure Reading (in psi)

Location Of Test

Comparison To Normal Range ☆☆☆☆☆

Repair Actions Taken

Repairs Done Cleared clogs in main line
 Addressed blockages in branch lines
 Cleaned aerators and showerheads
 Replaced damaged components

Damaged Components

Replacements

Post-Repair Inspection

Final Pressure Reading (in psi)

Consistent Water Flow Confirmed?

All Faucets And Fixtures Tested?

