



Module Mapping

Prior to creating a work order, there are some settings you need to configure. Details of these settings are listed in the sections below.

ⓘ Permission Required: [Module mapping](#)

Request to Work Order Mapping

On choosing the **Convert to Work Order** option in a request, the *Convert to Work Order* page is displayed with field values pre-filled. Using the **Requests to Work Order** mapping, you can determine the Request field values that you want to pre-fill the fields in *Convert to Work Order* page with.

To establish this mapping:

1. Navigate to **Setup > Customization > Module Mapping** and click **Requests to Work Order**. Click **Edit**.
2. From the **Requests** drop-down, select the Request fields to map the corresponding value to under **Work Orders** fields.
You can delete an entry using the **remove** (⊗) icon.
3. Click **Save**.
You can create a new entry for field mapping using + **Add New Line**.

Setup

General

Workforce

Field Service Settings

Integrations

Customization

Module Mapping

Status Settings

← Requests to Work Orders Mapping

Map the appropriate fields that are need to be copied from Requests to Work Orders module. You can add, edit or delete fields of same data type.

| Requests | Work Orders |
|----------------------|---|
| Asset | Asset |
| Billing Address | Billing Address |
| Billing Address Name | Billing Address Name |
| Billing City | Billing City |
| Billing Country | Billing Country ⓧ |
| Billing Latitude | Billing Latitude ⓧ |
| Billing Longitude | Billing Longitude |
| Billing State | Billing State |
| Billing Street | Billing Street ⓧ |
| Billing Street2 | Billing Street2 ⓧ |
| Billing Zip Code | Billing Zip Code |

Cancel Save

Request to Estimate Mapping

On choosing the **Convert to Estimate** option in a request, the *Convert to Estimate* page is displayed with field values pre-filled. Using the **Requests to Estimate** mapping, you can determine the Request field values that you want to pre-fill the fields in *Convert to Estimate* page with.

To establish this mapping:

1. Navigate to **Setup > Customization > Module Mapping** and click **Requests to Estimate**. Click **Edit**.
2. From the **Requests** drop-down, select the Request fields to map the corresponding value to under **Estimates** fields.
You can delete an entry using the **remove** (ⓧ) icon.
3. Click **Save**.
You can create a new entry for field mapping using + **Add New Line**.

Setup

- General
- Workforce
- Field Service Settings
- Integrations
- Customization
 - Module Mapping**
 - Status Settings

← Requests to Estimates Mapping

Map the appropriate fields that are need to be copied from Requests to Estimates module. You can add, edit or delete fields of same data type.

| Requests | Estimates |
|----------------------|----------------------|
| Asset | Asset |
| Billing Address | Billing Address |
| Billing Address Name | Billing Address Name |
| Billing City | Billing City |
| Billing Country | Billing Country |
| Billing Latitude | Billing Latitude |
| Billing Longitude | Billing Longitude |
| Billing State | Billing State |
| Billing Street | Billing Street |
| Billing Street2 | Billing Street2 |
| Billing Zip Code | Billing Zip Code |
| Company | Company |

Cancel Save

Estimate to Work Order Mapping

Upon choosing the **Convert To Work Order** option in an estimate, the *Convert to Work Order* page is displayed with field values pre-filled. Using the **Estimates to Work Orders** mapping, you can determine the Estimate field values that you want to pre-fill the fields in the *Convert to Work Order* page with.

To establish this mapping:

1. Navigate to **Setup > Customization > Module Mapping** and click **Estimate to Work Order**. Click **Edit**.
2. From the **Estimates** drop-down, select the Estimate fields to map the corresponding value to under **Work Orders** fields.
You can delete an entry using the **remove** (⊗) icon.
3. Click **Save**.
You can create a new entry for field mapping using + **Add New Line**.

Setup

- ▶ General
- ▶ Workforce
- ▶ Field Service Settings
- ▼ Customization
 - Module Mapping
 - Status Settings
- ▶ Automation
- ▶ Integrations

← Estimates to Work Orders Mapping

Map the appropriate fields that are need to be copied from Estimates to Work Orders module. You can add, edit or delete fields of same data type.

| Estimates | Work Orders |
|----------------------|---|
| Asset | Asset |
| Billing Address | Billing Address |
| Billing Address Name | Billing Address Name |
| Billing City | Billing City |
| Billing Country | Billing Country |
| Billing Latitude | Billing Latitude |
| Billing Longitude | Billing Longitude ▼ ⊗ |
| Billing State | Billing State |
| Billing Zip Code | Billing Zip Code |
| Company | Company ▼ ⊗ |

Cancel
Save

Work Order To Estimate Mapping

Upon clicking **Create** for **Follow Up Estimates** (under **Related List** tab) in a work order, the *Convert to Estimate* page is displayed with field values pre-filled. Using the **Work Order to Estimate** mapping, you can determine the Work Order field values that you want to pre-fill the fields in the *Create Estimate* page with.

To establish this mapping:

1. Navigate to **Setup > Customization > Module Mapping** and click **Work Order To Estimate**. Click **Edit**.
2. From the **Work Orders** drop-down, select the Work Order fields to map the corresponding value to under **Estimates** fields.

You can delete an entry using the **remove** (⊗) icon.

3. Click **Save**.

You can create a new entry for field mapping using + **Add New Line**. This mapping will be also used in the mobile app for creating follow up estimate from work order.

Setup

- General
- Workforce
- Field Service Settings
- Integrations
- Customization
 - Module Mapping**
 - Status Settings

← Work Orders to Estimates Mapping

Map the appropriate fields that are need to be copied from Work Orders to Estimates module. You can add, edit or delete fields of same data type.

| Work Orders | Estimates |
|----------------------|----------------------|
| Asset | Asset |
| Billing Address | Billing Address |
| Billing Address Name | Billing Address Name |
| Billing City | Billing City |
| Billing Country | Billing Country |
| Billing State | Billing State |
| Billing Street | Billing Street |
| Billing Street2 | Billing Street2 |
| Billing Zip Code | Billing Zip Code |
| Company | Company |
| Currency | Currency |
| Customer | Customer |

Cancel Save

Work Order to Service Appointment Mapping

Using the Work Order to Service Appointment Mapping setting, you can determine the Work Order field values that you want to pre-fill the fields in Manage Appointments overlay with.

To establish this mapping:

1. Navigate to **Setup > Customization > Module Mapping** and click **Work Order to Service Appointment**. Click **Edit**.
2. From the Work Order drop-down, select the Work Order fields to map the corresponding value to under Service Appointment fields.
You can delete an entry using the remove (⊗) icon.
3. Click **Save**.
You can create a new entry for field mapping using + **Add New Line**.

Setup

General

Workforce

Field Service Settings

Integrations

Customization

Module Mapping

Status Settings

← Work Orders to Service Appointments Mapping

Map the appropriate fields that are need to be copied from Work Orders to Service Appointments module. You can add, edit or delete fields of same data type.

| Work Orders | Service Appointments |
|---------------------------|---------------------------|
| Asset | Asset |
| Company | Company |
| Currency | Currency |
| Customer | Customer |
| Due Date | Due Date |
| Exchange Rate | Exchange Rate |
| Preference | Preference |
| Preferred End Date Time | Preferred End Date Time |
| Preferred Slot | Preferred Slot |
| Preferred Start Date Time | Preferred Start Date Time |
| Summary | Summary |
| Territory | Territory |

Cancel
Save

Work Order To Work Order Mapping

Upon clicking **Create** for **Follow Up Work Orders** (under **Related List** tab) in a Work Order, the *Convert to Work Order* page is displayed with field values pre-filled. Using the **Work Order To Work Order** mapping, you can determine the Work Orders field values that you want to pre-fill the fields in the *Convert to Work Order* page with.

To establish this mapping:

1. Navigate to **Setup > Customization > Module Mapping** and click **Work Order to Work Order**. Click **Edit**.
2. From the **(Follow Up) Work Orders** drop-down, select the **(Follow Up) Work Order** field to which you want the value in the corresponding Work Order field to be mapped.
You can delete an entry using the remove (⊖) icon.
3. Click **Save**.
You can create a new entry for field mapping using + **Add New Line**. This mapping will be also used in the mobile app for creating follow up work order from a work order.

To map Service Line Items, Part Line Items, Service Tasks Line Items, or Skill Line Items from Work Orders to Follow Up Work Orders, enable the respective toggles. If you disable the mapping for **Service Line Items to Service Line Items**, then the mapping for **Part Line Items to Part Line Items**, **Service Tasks Line Items to Service Tasks Line Items**, and **Skill Line Items to Skill Line Items** will automatically be disabled.

The screenshot shows the FSM software interface. The top navigation bar includes 'FSM', 'Home', 'Customers', 'Work Order Management', 'Dispatch Console', 'Billing', 'Services And Parts', 'Workforce', and 'Professional Trial Upgrade'. The left sidebar is titled 'Setup' and contains a search bar and a list of categories: General, Workforce, Security Control, Field Service Settings, Channels, Maintenance Plans, Billing, Customization (with sub-items: Modules and Fields, Module Mapping, Job Sheets, Dispatch Console, Service Reports, Templates), Automation, Data Administration, Developer Space, and Integration. The main content area is titled 'Module Mapping > Work Orders to Work Orders'. It contains a description: 'Map the appropriate fields that are need to be copied from Work Orders to Work Orders module. You can add, edit or delete fields of same data type.' Below this are three buttons: 'Reset', 'Edit', and 'Add New Line'. A table titled 'Work Orders to Work Orders' lists the following mappings:

| Source Field | Target Field |
|-----------------|-----------------|
| Work Orders | Work Orders |
| Adjustment | Adjustment |
| Asset | Asset |
| Billing Address | Billing Address |
| Company | Company |
| Contact | Contact |
| Currency | Currency |
| Discount | Discount |
| Discount Type | Discount Type |
| Email | Email |
| Exchange Rate | Exchange Rate |
| Mobile | Mobile |

Service Appointment to Service Report Mapping

Using the Service Appointment to Service Report mapping, you can determine the Service Appointment field values that you want to pre-fill the fields in [Create Service Report](#) overlay with.

To establish this mapping:

1. Navigate to **Setup > Customization > Module Mapping** and click **Service Appointment to Service Report**. Click **Edit**.
2. Click + **Add New Line**.
3. From the Service Appointment drop-down, select the Service Appointment field whose value you want to map to a Service Report field.
You can delete an entry using the remove (⊖) icon.
4. Click **Save**.