



# Manage Organization Settings

ⓘ Permission Required: [General Permissions](#)

You can add organizational details such as:

- General company details
- Locale Information
- Business Hours
- Holidays
- Currencies Used

## Company Details

You can add the following details of a company:

- The address, phone numbers, and the location. These details will be used in Estimates, Invoices, and Service Reports.
- The organization time zone and the currencies used.
- The unit of measurement for distance. You can either choose Kilometres or Miles.

To add the company details:

1. Navigate to **Setup > General > Organization Details** and click **Edit**.
2. In the *Edit Company* overlay, enter the required details and click **Save**.

FSM Customers Work Order Management Dispatch Console Services And Parts Assets Reports

### Setup

- General
  - Organization Details
  - Business Hours
  - Currency
- Workforce
- Field Service Settings
- Customization
- Automation
- Billing
- Data Administration
- Developer Space

### Organization Profile

Summary of your Organization. You can set up your organization details, address and locale preferences over here, which will reflect in the documents like estimates, service reports and invoices.

[Edit](#)

- Basic Information
  - Company Name: Zylker
  - Industry: --
  - Website: --
  - Phone: --
  - Mobile: --
  - Fax: --
- Location Information
  - Address: No Location Information
- Preferences
  - Language: English
  - Currency: US Dollar
  - Time Zone: PST
  - Date Format: MMM dd, yyyy
  - Time Format: hh:mm a
  - Distance Unit: Miles

[Delete Zoho FSM Organization](#)

The timezone of the FSM organization will be displayed next to the [DateTime](#) fields in case the timezone of the FSM organization differs from that of the system timezone.

### Create Appointment

Service:

Summary:

Currency:

Exchange Rate:

Asset:

Preferred Time: -None-  
Due Date: Mar 16, 2022

Scheduled Start Date Time:   (GMT -07.00)

Scheduled End Date Time:   (GMT -07.00)

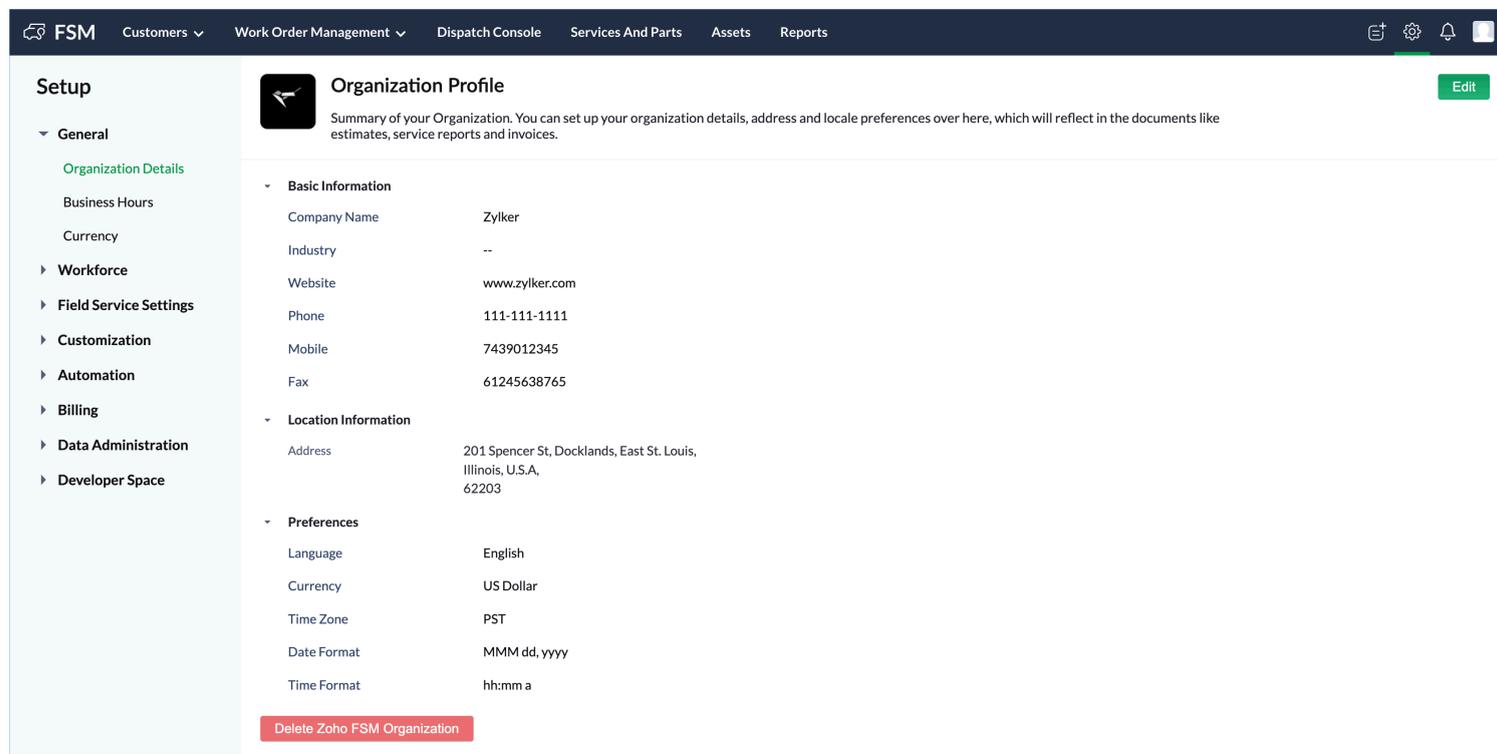
Service Resource:

## Company Logo

To add a company logo:

1. Navigate to **Setup > General > Organization Details** and click the placeholder [  ] for company logo.
2. In the *Upload* overlay, click **Choose file to upload** and select the image for your logo.  
The supported file formats are .png and .jpeg. The maximum allowed size of the image is 5MB.
3. Resize the image if necessary and click **Upload**.

You can change or delete the applied logo.



The screenshot shows the Zoho FSM interface. The top navigation bar includes 'FSM', 'Customers', 'Work Order Management', 'Dispatch Console', 'Services And Parts', 'Assets', and 'Reports'. The left sidebar is titled 'Setup' and contains a tree view with categories like 'General', 'Workforce', 'Field Service Settings', 'Customization', 'Automation', 'Billing', 'Data Administration', and 'Developer Space'. The 'Organization Profile' page is active, showing a summary and a list of settings:

- Basic Information**
  - Company Name: Zylker
  - Industry: --
  - Website: www.zylker.com
  - Phone: 111-111-1111
  - Mobile: 7439012345
  - Fax: 61245638765
- Location Information**
  - Address: 201 Spencer St, Docklands, East St. Louis, Illinois, U.S.A, 62203
- Preferences**
  - Language: English
  - Currency: US Dollar
  - Time Zone: PST
  - Date Format: MMM dd, yyyy
  - Time Format: hh:mm a

At the bottom of the settings list, there is a red button labeled 'Delete Zoho FSM Organization'. An 'Edit' button is visible in the top right corner of the settings area.

## Mark Business Hours

You can define the official business or working hours of your organization.

 Available in Editions: **Standard, Professional**

To set the business hours of your organization, do the following:

1. Navigate to **Setup > General > Organization Details** and click **Configure** for **Business Hour Details**.

FSM Home Customers Work Order Management Dispatch Console Billing Services And Parts Workforce Professional Trial Upgrade Help

### Setup

Search

- General
  - Organization Details
  - Currency
- Workforce
- Security Control
- Field Service Settings
- Channels
- Maintenance Plans
- Billing
- Customization
- Automation
- Data Administration
- Developer Space
- Integration

## Organization Profile

Summary of your Organization. You can set up your organization details, address and locale preferences over here, which will reflect in the documents like estimates, Service Reports and invoices.

Address: 39 Inner Loop Rd, Fort Irwin, California, U.S.A., 92310

Preferences

- Currency: US Dollar - USD
- Time Zone: (GMT -8:00) Pacific Daylight Time (PST)
- Date Format: dd MMM yyyy
- Time Format: 12 Hour
- Distance Unit: Kilometres

**Business Hour Details** [Modify](#)

Week Starts On: Monday

Business Hours

Monday	09:00 AM - 05:00 PM
Tuesday	09:00 AM - 05:00 PM
Wednesday	09:00 AM - 05:00 PM
Thursday	09:00 AM - 05:00 PM
Friday	09:00 AM - 05:00 PM

Delete Zoho FSM Organization

2. In the *Business Hours* overlay, select the required options and click **Save**.

### Business Hours

#### Business Hours Details

Business Hours

- 24 Hours X 7 days
- 24 Hours X 5 days
- Custom Hours

Week Starts On:

Business Timing

- Same Hours Everyday
- Different Hours Everyday

Business Days

<input checked="" type="checkbox"/> Monday	09:00 AM	05:00 PM
<input checked="" type="checkbox"/> Tuesday	09:00 AM	05:00 PM
<input checked="" type="checkbox"/> Wednesday	09:00 AM	05:00 PM
<input checked="" type="checkbox"/> Thursday	09:00 AM	05:00 PM
<input checked="" type="checkbox"/> Friday	09:00 AM	05:00 PM
<input type="checkbox"/> Saturday	12:00 AM	12:00 AM
<input type="checkbox"/> Sunday	12:00 AM	12:00 AM

Cancel Save

In the dispatch console Gantt area, the business hours will be shaded white. Also, in the **Day** view, the Gantt area will scroll to the start of the business hours. In the **Week** view, the start of the week will be considered from the day selected for **Week Starts On**.

The screenshot displays the Zoho FSM Dispatch Console interface. On the left, a list of service appointments is shown, including details such as appointment ID (e.g., AP-7), service type (TV Installation), scheduled dates and times, and status (Scheduled, New, Completed, Partially C...). On the right, the Gantt view is active for Friday, January 13, 2023, showing a time grid from 09:00 AM to 02:00 PM. A red arrow points to the 09:00 AM mark, which is the start of the shaded business hours area. The Gantt chart also lists field technicians and their appointment counts for the day.

When creating or editing a service appointment, the **Scheduled Start Date Time** dropdown will display values starting from the beginning of business hours.

### Create Service Appointment

**Service Appointment Summary**

Service: AC Installation (SVC-229)  
New, Quantity: 1

Summary: Leakage repair

Type: Service

Asset: Search Asset

Currency: USD

Exchange Rate: 1

Scheduled Start Date Time: 04 Mar 2025

Scheduled End Date Time: 03 Mar 2025

Service Resource: Select

Time selection dropdown: hh:mm A  
09:00 AM  
09:30 AM  
10:00 AM  
10:30 AM  
11:00 AM  
11:30 AM  
12:00 PM

Buttons: Cancel, Schedule, Schedule and Dispatch

## Manage multiple currencies



Available in Editions: **Standard, Professional**

In addition to the currency chosen during the initial setup, you can add other currencies. To do so:

1. Navigate to **Setup > General > Currency** and click **Add Currency**.
2. In the *Add Currency* overlay, enter the required details and click **Create**.

## Add Currency ✕

### Basic Information

Currency	<input type="text" value="Canadian Dollar"/>
Exchange Rate	<input type="text" value="1.25"/>
Thousand Seperator	<input type="text" value="Comma"/>
Decimal Spaces	<input type="text" value="2"/>
Decimal Seperator	<input type="text" value="Period"/>

Once multiple currencies are added, the option to choose the required currency will be available while creating Contacts, Work Orders, and more.

## Holidays

You can create a holiday list for your organization. These holidays will be marked in the Gantt view of the [dispatch console](#). It will also be listed in the [service resource calendar](#), wherever it is shown. This information will be helpful when you schedule appointments from these places.



Available in Editions: **All Editions**

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To add a holiday:

1. Navigate to **Setup > General > Holidays**.
2. Select the year for which you want to add the holidays and click **Add Holiday List**.

Setup

- General
  - Organization Details
  - Business Hours
  - Holidays**
  - Currency
- Workforce
- Field Service Settings
- Customization
- Automation
- Billing
- Data Administration
- Developer Space

### Holidays

Holiday list helps you configure your business holidays, which can be used for scheduling by marking the details in Gantt View and all calendars in the system.

< 2023 > →

Add Holidays List →

Holiday Name	Holiday Date	Day
No Records Found		

3. Click **+New Line**. Enter a **Holiday Name**, and **Holiday Date**. Click **Save**.

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

## Add Holidays List



Year

### Holidays List

Holiday Name	Holiday Date	
<input type="text" value="New Year's Day"/>	<input type="text" value="Jan 01, 2023"/>	<input type="button" value="−"/>
<input type="text" value="Martin Luther King Day"/>	<input type="text" value="Jan 16, 2023"/>	<input type="button" value="−"/>
<input type="text" value="Easter"/>	<input type="text" value="Apr 09, 2023"/>	<input type="button" value="−"/>
<input type="text" value="Memorial Day"/>	<input type="text" value="May 29, 2023"/>	<input type="button" value="−"/>
<input type="text" value="Juneteenth"/>	<input type="text" value="Jun 19, 2023"/>	<input type="button" value="−"/>
<input type="text" value="Independence Day"/>	<input type="text" value="Jul 04, 2023"/>	<input type="button" value="−"/>
<input type="text" value="Labor Day"/>	<input type="text" value="Sep 04, 2023"/>	<input type="button" value="−"/>
<input type="text" value="Thanksgiving Day"/>	<input type="text" value="Nov 23, 2023"/>	<input type="button" value="−"/>
<input type="text" value="Christmas Day"/>	<input type="text" value="Dec 25, 2023"/>	<input type="button" value="−"/>

Cancel

Save

You can find the holiday list under the respective year.

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

### Setup

- General
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  - Holidays
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#### Holidays

Holiday list helps you configure your business holidays, which can be used for scheduling by marking the details in Gantt View and all calendars in the system.

< 2023 > Edit

Holiday Name	Holiday Date	Day
New Year's Day	Jan 01, 2023	Sunday
Martin Luther King Day	Jan 16, 2023	Monday
Easter	Apr 09, 2023	Sunday
Memorial Day	May 29, 2023	Monday
Juneteenth	Jun 19, 2023	Monday
Independence Day	Jul 04, 2023	Tuesday
Labor Day	Sep 04, 2023	Monday
Thanksgiving Day	Nov 23, 2023	Thursday
Christmas Day	Dec 25, 2023	Monday

The holidays added will be listed in the following places:

- Gantt view of the Dispatch Console

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

All Service Appointments

23 Nov, 22

3

Gantt Maps

1 Jan, 2023

Territory: Zylker Appliances

Field Technician: All

01:00 AM 02:00 AM 03:00 AM 04:00 AM 05:00 AM 06:00 AM 07:00 AM

New Year's Day

Lori Ross  
Appointments: 0

Marianne Sheehan  
Appointments: 0

Extermination Crew  
Appointments: 0

01 Sun 4:23:48 AM

- [Users Details](#) and [Crew Details](#) page

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

Users > Lori Ross

Active | Administrator

User Information

- First Name: Lori
- Last Name: Ross
- Phone: --
- Mobile: --

Address

No Address Found

Territories

- Zylker Appliances
- Start Date: Nov 16, 2022
- End Date: -

Crews

No Crew Found

Skills

No Skills Found

Created By

Marianne Sheehan  
on Mar 29, 2022 11:16 AM

Timeline Calendar Territories Crews Skills Trips Related list

Calendar: June 2023

Sun	Mon	Tue	Wed	Thu	Fri	Sat
28	29 <b>Memorial Day</b>	30	31	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19 <b>Juneteenth</b>	20	21	22	23	24
25	26	27	28	29	30	1
2	3	4 <b>Independence...</b>	5	6	7	8

- [Service Resource Details](#) popup in the Gantt view of the Dispatch Console

FSM Customers Work Order Management Dispatch Console Services

Lori Ross

All Service Appointments

23 Nov, 22

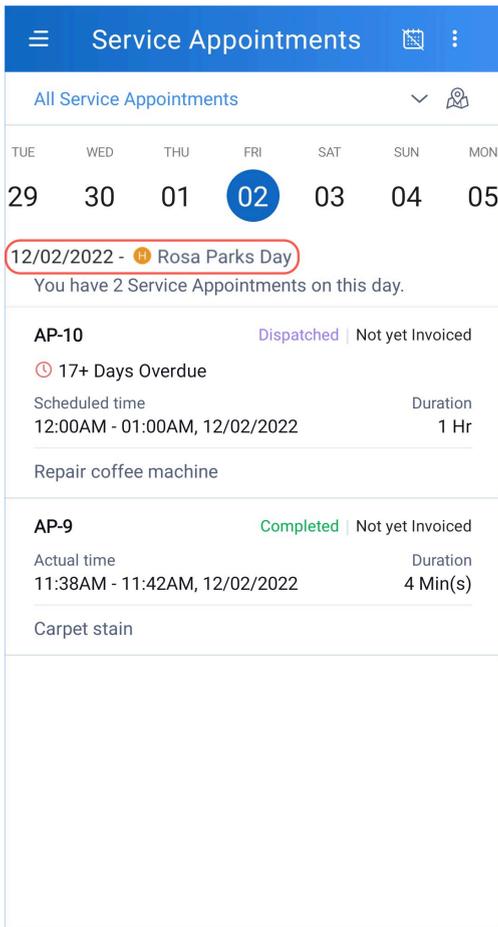
AP-#	Service	Scheduled on	Status	Asset	Location
AP-7	TV Installation	Scheduled on Nov 17, 2022 01:00:00 - Nov 17, 2022 02:40:00	Scheduled	Samsung 80...	Lu...
SVC-10	TV Installation		Scheduled		1
AP-6	TV Installation	Scheduled on Nov 16, 2022 07:30:00 - Nov 16, 2022 09:00:00	Scheduled	Samsung 80...	H...
SVC-9	TV Installation		Scheduled		1
AP-5	TV Installation	Scheduled on Aug 11, 2022 02:00:00 - Aug 11, 2022 03:30:00	Scheduled		H...
SVC-6	Leakage repair		Scheduled		1
AP-4	TV Installation	Scheduled on Aug 11, 2022 09:00:00 - Aug 11, 2022 10:00:00	New		H...
SVC-5	TV Installation		Scheduled		1
AP-3	TV Installation	Actual Time Nov 17, 2022 11:00:00 - Nov 17, 2022 11:30:00	Completed		H...
SVC-3	TV Installation		Partially C...		1
AP-2	TV Installation	Actual Time Mar 31, 2022 06:50:00 - Mar 31, 2022 06:50:00	Completed		H...
SVC-2	TV Installation		Completed		1
AP-1	TV Installation	Actual Time Mar 29, 2022 03:20:00 - Mar 29, 2022 03:20:00	Completed		H...

Total records: ### 10 Records per page

Calendar: June 2023

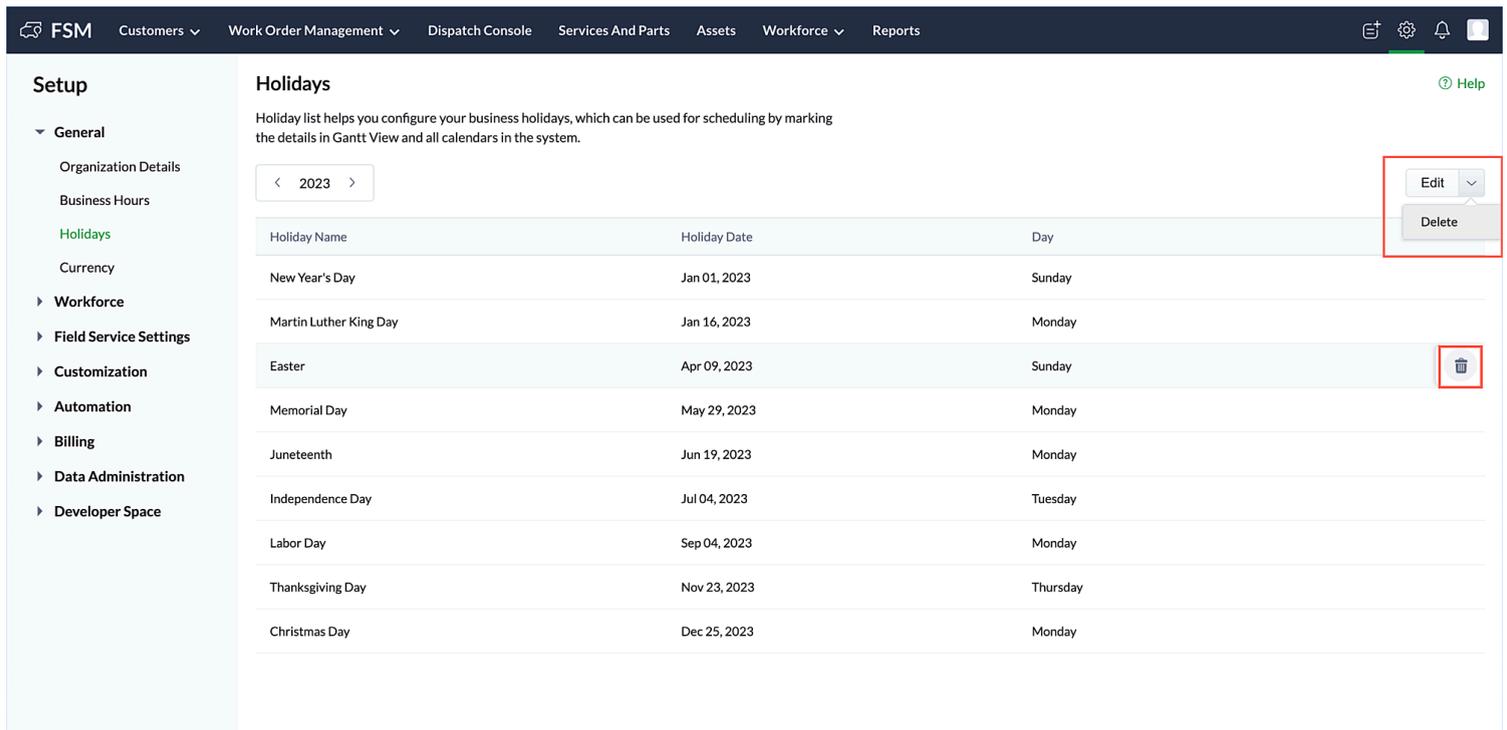
Sun	Mon	Tue	Wed	Thu	Fri	Sat
28	29 <b>Memorial Day</b>	30	31	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19 <b>Juneteenth</b>	20	21	22	23	24
25	26	27	28	29	30	1
2	3	4 <b>Independence ...</b>	5	6	7	8

- In the mobile app, the information about a [holiday](#) present for the day will be shown in the calendar view of the *Service Appointments* screen.



## Manage holidays

You can edit, or delete holidays. You can also delete an individual holiday entry.

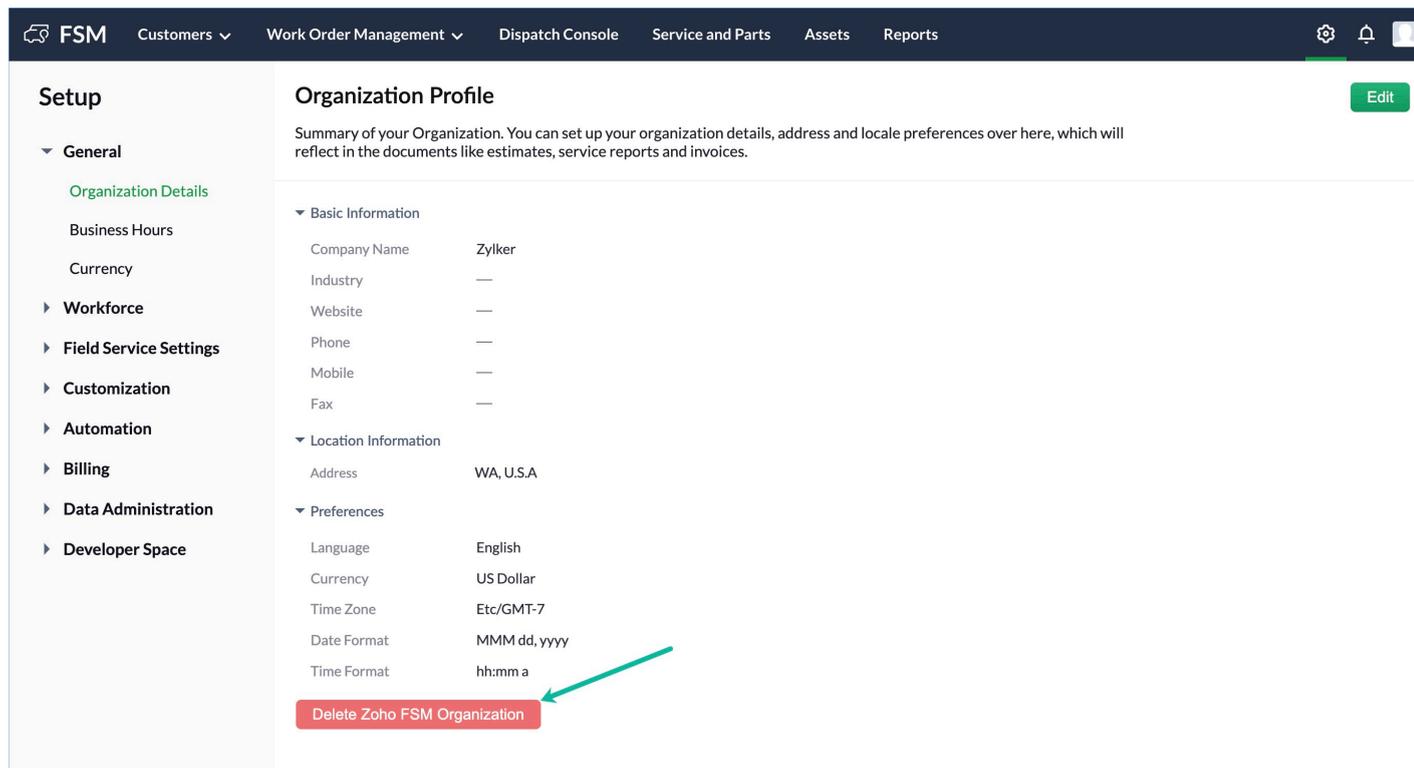


# Deleting FSM Organization

You can delete your FSM Organization anytime you wish to do so provided it is not in a Paid edition.

To delete your FSM Organization:

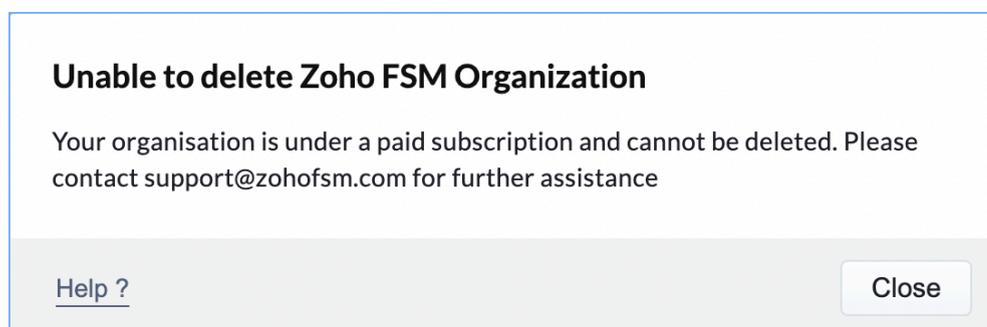
1. Navigate to **Setup > General > Organization Details**.
2. Click **Delete Zoho FSM Organization**.



3. You will be provided with options based on whether your Zoho FSM account is in a Paid edition or not.

## Zoho FSM account is in a Paid edition

You will not be allowed to delete the Zoho FSM organization.



## Zoho FSM account is in the Free edition

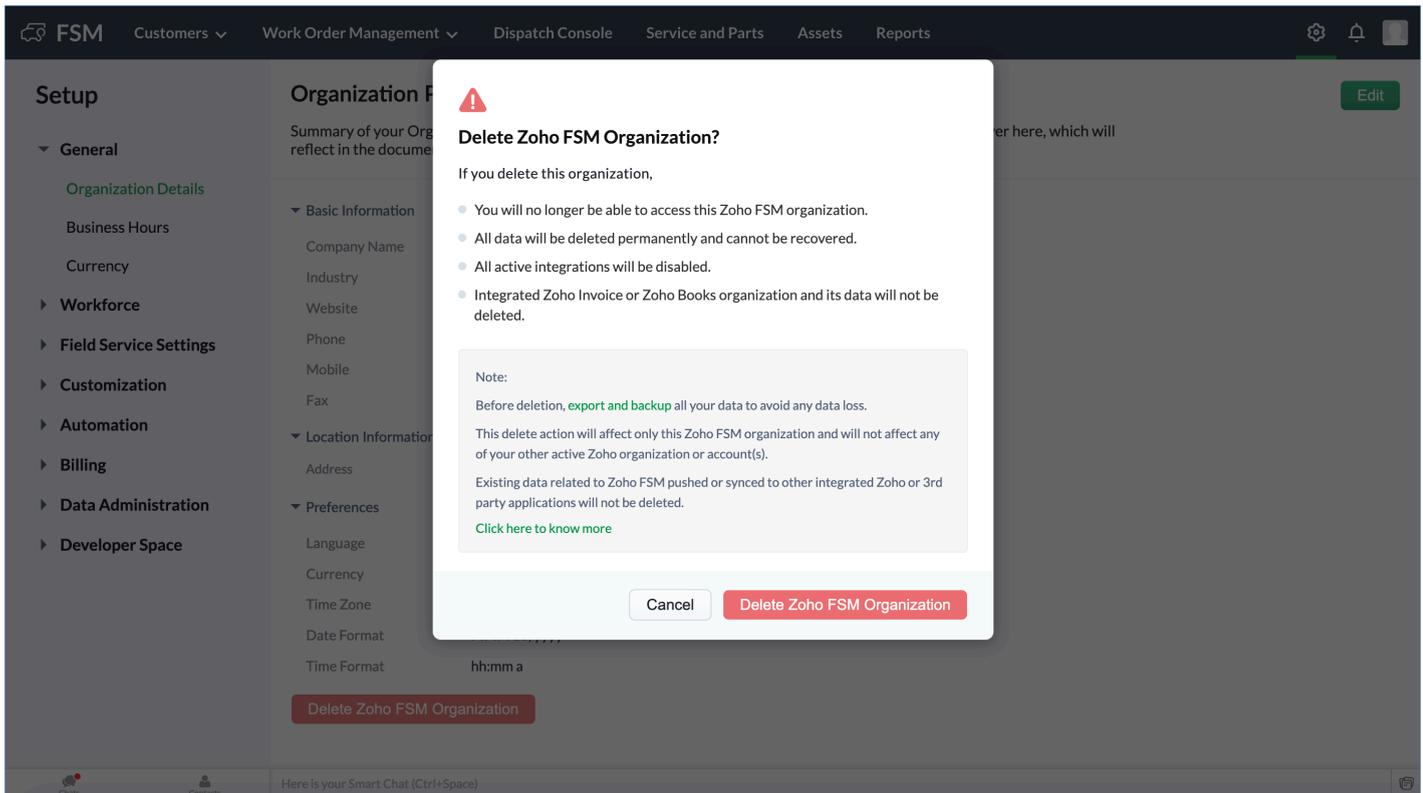
The users in the account have to be deleted or deactivated before you can delete the FSM organization. Click **Close** in the **Unable to delete Zoho FSM Organization** popup.

## Unable to delete Zoho FSM Organization

All active users should be deleted or deactivated, before deleting Zoho FSM Account

Close

4. After the users are deleted or deactivated click **Delete Zoho FSM Organization**. Click **Delete Zoho FSM Organization** in the confirmation message.



You will be logged out of your account as soon as your FSM organization has been permanently deleted. An email notification will inform you about the organization's deletion.

## Effects of deleting the FSM Organization

1. The deleted FSM Organization can no longer be accessed.
2. All the data in the account will be permanently deleted without any scope for recovery.  
For this reason, it's prudent to [export](#) your data, and back it up to avoid any loss of data.
3. All integrations done using this account will no longer be functional.

## What will remain unaffected?

1. Any Zoho Books or Invoice organization integrated with this FSM organization will not be deleted.

2. Any FSM data pushed to or synced with an integrated Zoho or third-party application will remain unaffected.
3. The deletion will affect only the organization in question. Any other organization associated with the user will remain unaffected.