



Quick Start Guide

Zoho FSM is a cloud application that offers an overarching solution for handling the entire life cycle of processes involved in the management and execution of field services. All processes that are pivotal to field services are automated, such as work order management, scheduling, dispatching and tracking of service appointments, and invoicing. This eliminates the burden of paperwork and other tedious manual tasks that usually bog down field service activities. By providing a unified platform that allows users to segue into the different field processes, Zoho FSM helps users carry out their tasks efficiently. The availability of composite, real-time information about the process entities provides users with the visibility that helps enhance first-time fix rates and lessen process errors.

Service appointments can be scheduled based on their territory, and dispatched to the most appropriate agent to ensure minimum turnaround time. The FSM mobile app is a handy tool for the on-the-go field agents, giving them access to pertinent data to complete their assigned tasks swiftly and efficiently. Built-in invoicing features ensure that billing times are greatly reduced, resulting in immediate payments and realization of revenue.

The topics in this guide are divided into two parts: Onboarding and Work Order Management. **Onboarding** covers the steps immediately following your first sign in to your account. **Work Order Management** covers creating your first work order and completing all its affiliated processes.

[1. Onboarding](#)

[1.1 Organization details](#)

[1.2 Time and language settings](#)

[1.3 Country-specific Tax Rate\(s\)](#)

[2. Work Order Management](#)

[2.1 Create your first work order](#)

[2.2 Create a Service Appointment](#)

[2.3 Dispatch Service Appointment](#)

[2.4 Start Work](#)

[2.5 Complete Work](#)

[2.6 Generate Invoice](#)

[2.7 Record Payment](#)

[2.8 Close Work Order](#)

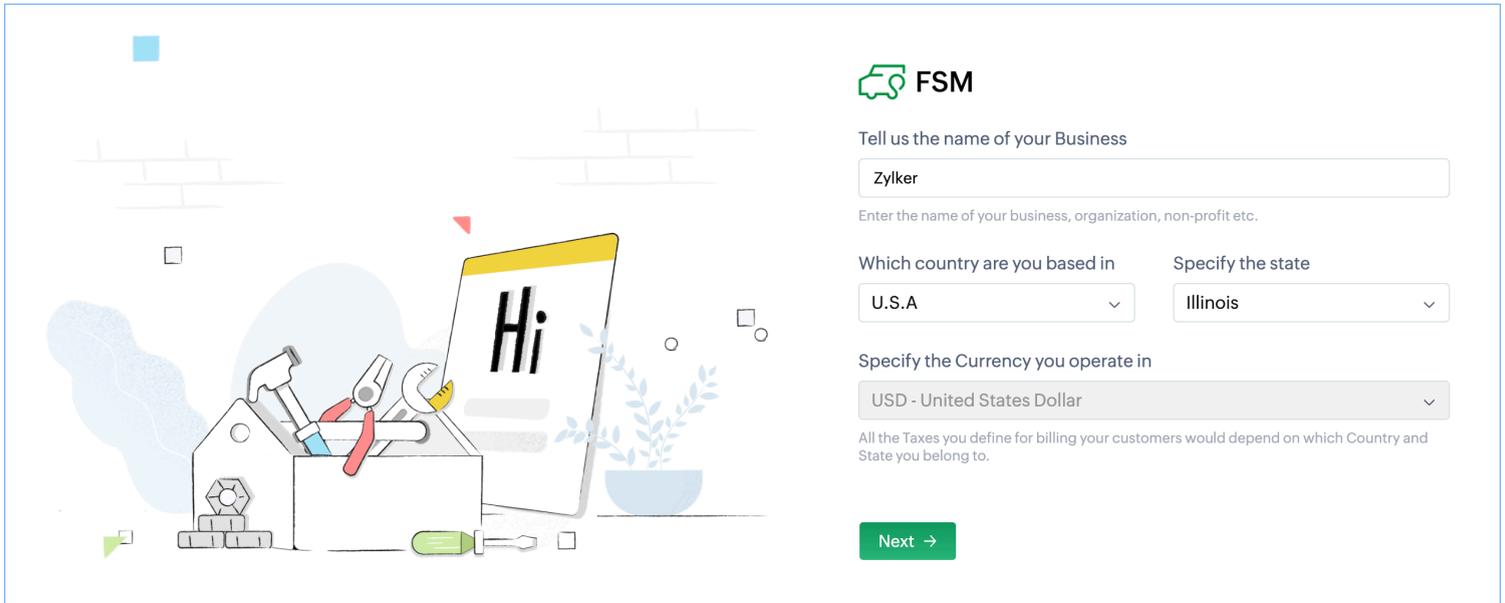
1. Onboarding

When you create an FSM account for your organization, you will be guided through the steps that comprise the Zoho FSM account set up.

You will be required to provide the following information:

1.1 Organization details

- The name of your organization
- The locale of your organization

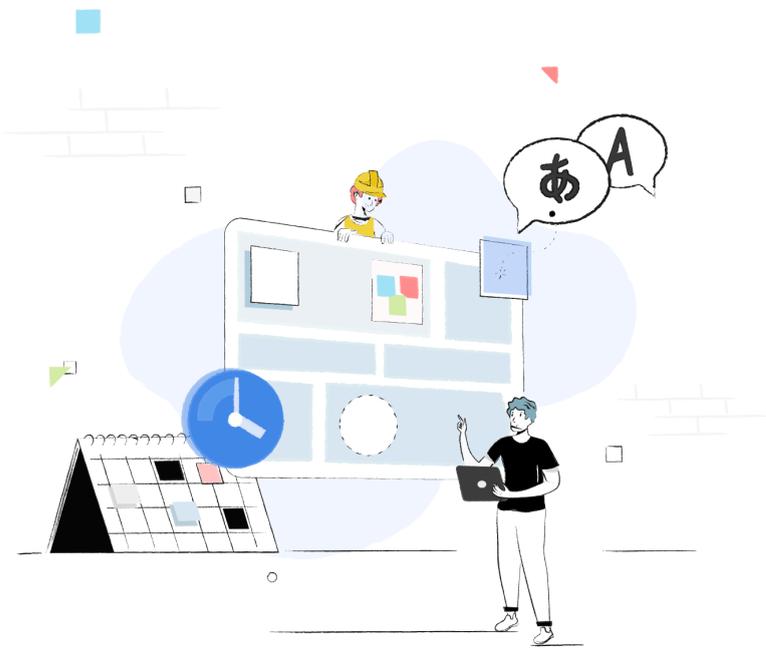


The screenshot shows the Zoho FSM setup interface. On the left is an illustration of a toolbox with various tools and a tablet displaying 'Hi'. On the right, the 'FSM' logo is at the top. Below it, the text 'Tell us the name of your Business' is followed by a text input field containing 'Zyker'. A note below the field says 'Enter the name of your business, organization, non-profit etc.'. Below this are two dropdown menus: 'Which country are you based in' (set to 'U.S.A') and 'Specify the state' (set to 'Illinois'). Below these is another dropdown menu 'Specify the Currency you operate in' (set to 'USD - United States Dollar'). A note at the bottom states 'All the Taxes you define for billing your customers would depend on which Country and State you belong to.' At the bottom right is a green 'Next →' button.

You can edit these details later at **Setup > General > Organization Details**. Primary or home currency for your business operations will be selected based on the locale selected.

1.2 Time and language settings

- A common time zone for your organization's Zoho FSM account
The time zone will be automatically selected based on the locale of the organization you chose in the previous step.
- The language that you want to set as the primary language of the organization. You can change it later by changing the language of the super admin.





Specify Timezone and Language

Choose your timezone

(GMT -5:00) Eastern Daylight Time (America/New_York)
▼

This setting helps you create Work Orders in certain time zones. No matter where you create a Work Order, everyone will see it in their own time zone.

Choose your preferred language

English - United States
▼

This is the preferred language you would see when you are logged into Zoho FSM.

Save & Continue

You can edit these details later at **Setup > General > Organization Details > Preferences**. If you have an existing [Invoice/Books](#) account, you can integrate it with your FSM account. Otherwise, a new Invoice account will be created.

1.3 Country-specific Tax Rate(s)

- The tax rates you want to use in your estimates, work orders, and invoices and the tax authority administering them.

Zoho FSM supports taxes for your transactions, with [region-specific tax rules](#). The tax-related properties can be added for **Services And Products**, **Contacts**, and **Companies**. The invoicing and payments in Zoho FSM is powered by Zoho Invoice.



Does your organization collect Tax?

Yes
 No
 Configure Later

Define Taxes in accordance with the state you are rendering service for.

Tax Name	Rate(%)	Tax Authority
Illinois Sales Tax	6.25	Illinois Department ⊖
+ New Tax		

Save & Continue

Eg. Tax Authority for the tax you are adding. Eg: Illinois Department of Revenue.

The taxes defined here can be edited later at **Setup > Integrations > Billing > Tax Setting**. The taxes can also be edited at **Settings > Taxes** in [Zoho Invoice](#).

2. Work Order Management

2.1 Create your first Work Order

Work Order

A work order is a record created for executing a contact service request.

To create a work order:

1. Select the **Work Orders** module from the **Work Order Management** menu and click **Create**.
2. Enter the following details and click **Save**:
 - a. A **Summary** of the work order
 - b. A **Priority**
 - c. A **Type** to indicate the nature of the service the work order is being created for.
 - Service*: For providing, among others, repair, installation, or maintenance services
 - Inspection*: For performing diagnostics tasks
 - d. A **Due Date** that the work order should be closed by
 - e. The **Company** the contact belongs to
 - f. The **Contact** for whom the work order is being created
 - g. The **Email** address of the contact
 - h. The **Phone** number of the contact
 - i. An **Asset**
 - An [Asset](#) is added when the service is for a product that you have sold
 - j. The **Territory** in which the customer is located.
 - k. A **Service Address**
 - This is the address of the contact's location where the service task needs to be carried out. If a Service address exists for the contact, then on selecting a value in the **Contact** field, that address is filled in the **Service address** field. If the service address does not exist, then you can choose any other address available for the contact, or click **Create New**.
 - l. A **Billing Address**

Create Work Order

Cancel
Save and New
Save

Work Order Summary

Summary

Priority

Type

Due Date

Contact Details

Contact

Company

Phone

Email

Asset

Asset

Address

Territory

Service Address

Billing Address

- m. **Preferred Date1**, and **Preferred Date2** for the service call
- n. A **Preferred Time**.
- o. Any additional **Preference Note** regarding the service call
- p. Entries for **Services**

These denote the services which have to be delivered for this work order. The services added in the [Services And Products](#) module will be listed here. Select a tax rate or choose non-taxable by providing a reason. Click [here](#) to find details about setting the tax rates. Enter a percentage for the discount you wish to offer or a discount amount.

Create Work Order

Cancel
Save and New
Save

Preference

Preferred Date 1

Preferred Date 2

Preferred Time

Preference Note

Currency

Currency

Exchange Rate

Services IllinoisSalesTax change

Service Name	Quantity	List Price	Discount	Tax Name	Line Item Total
<div style="display: flex; align-items: center;"> Move out carpet cleaning <div style="margin-left: 5px; border: 1px solid #ccc; padding: 2px;"> </div> </div>	1	100	0	\$	106.25
<div style="border: 1px solid #ccc; padding: 5px; margin-top: 5px;"> <p>Description</p> </div>					
+ New line					
Sub Total (\$) With tax					106.25

q. Add the **Parts** necessary for the service tasks.

For **Service**, select the service for which the product has been added. Select a tax rate or choose non-taxable by providing a reason. Click [here](#) to find details about setting the tax rates. Enter a percentage for the discount you wish to offer or a discount amount.

r. Add the **Skills** necessary for the service tasks.

For **Service**, select the service for which the skill has been added.

Create Work Order Cancel Save and New Save

Parts

Part Name	Quantity	List Price	Discount	Sub Total	Tax Name
Hoover Carpet Cleaner with	1 Each	79.69	0 \$	79.69	IllinoisSalesTax
Description <input type="text"/>					
Service Move out carpet cleaning					
Fiber Rinse	1 Each	63.75	0 \$	63.75	IllinoisSalesTax
Description <input type="text"/>					
Service Move out carpet cleaning					
+ New line					
Sub Total (\$) With tax					152.40
Grand Total (\$) Services + Parts					258.65

Skills

Skill Name	Service
Carpet Cleaning & Stain Removal	Move out carpet cleaning
+ New line	

2.2 Create a Service Appointment

Service Appointment

Service appointments are jobs created for carrying out the services in a work order.

To create a service appointment:

1. Select the **Work Orders** module from the **Work Order Management** menu. Click the work order you want to add the service appointment to.

2. Click the **Manage Appointment** button at the top or select the **Appointments** tab and click **Create Appointment**.

3. Enter the following details, then click **Schedule**:

a. A **Summary** for the service appointment

b. The values for **Start Date/Time** and **End Date/Time**.

The Start Date/Time and End Date/Time can be scheduled for different dates

c. A Service Resource ([Field Agent](#) or a [Crew](#))

One or more resources from the territory can be assigned to the appointment.

The screenshot shows the 'Create Appointment' dialog in the FSM interface. The background shows a work order for 'WO5' with details for 'End of lease cleaning', including a contact 'Joe Molinaro' and company 'Nebula'. The dialog form is filled with the following information:

- Service: Move out carpet cleaning(SVC-8)
- Summary: End of lease cleaning
- Currency: USD
- Exchange Rate: 1
- Start Date/Time: 09/21/2021 03:30 PM
- End Date/Time: 09/21/2021 05:30 PM
- Duration: 2 Hr
- Service Resource: Hilary Mantel

Buttons for 'Cancel' and 'Schedule' are located at the bottom right of the dialog.

2.3 Dispatch Service Appointment

To dispatch a service appointment:

1. Select the **Work Orders** module from the **Work Order Management** menu. Click the work order whose service appointment you want to dispatch.
2. Select the **Appointments** tab and click the service appointment you want to dispatch.
3. Click **Dispatch**.

The screenshot displays the Zoho FSM web interface. At the top, there is a navigation bar with 'FSM' and several menu items: 'Customers', 'Work Order Management', 'Dispatch Console', 'Services And Products', and 'Asset'. Below this, a breadcrumb trail shows 'Work Order > W05 > Manage Appointments'. The main content area is divided into a left sidebar and a main panel. The sidebar, under 'APPOINTMENTS', lists 'AP-3 Move out carpet cleaning (SVC-8)' with a 'Scheduled' status indicator. The main panel shows details for appointment 'AP-3 End of lease cleaning', including a 'Scheduled' status, assigned resource 'Tracy Pollan', and time 'Sep 21, 2021 03:20 PM'. Below this are tabs for 'OVERVIEW', 'TIME SHEET', 'SERVICE REPORT', 'INVOICE', 'TRIPS', and 'NOTES'. The 'OVERVIEW' tab is active, showing 'SA Information' with service details, scheduled times (21 Sep 2021 03:30 PM to 05:30 PM), and assigned resources. A table lists 'Hilary Mantel' as the service resource. Below this is a 'Service Appointment Summary' section with fields for Summary, Contact, Company, Asset, Due Date, and Preferred Times.

When a service appointment is dispatched, the field agents assigned to the appointment are notified in their FSM mobile app through push notifications. The FSM mobile app can be downloaded from the links below:

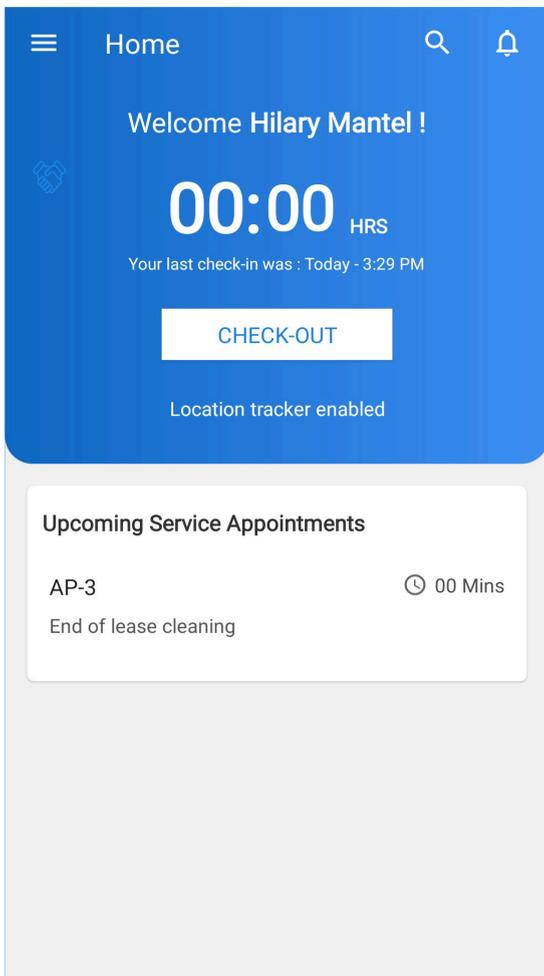
App Store: <https://apps.apple.com/in/app/zoho-fsm-for-field-agents/id1509013474>

Google Play : <https://play.google.com/store/apps/details?id=com.zoho.platform.fsm>

2.4 Start Work

The lead field agent assigned to the service appointment can update the status of the service appointment from the mobile app.

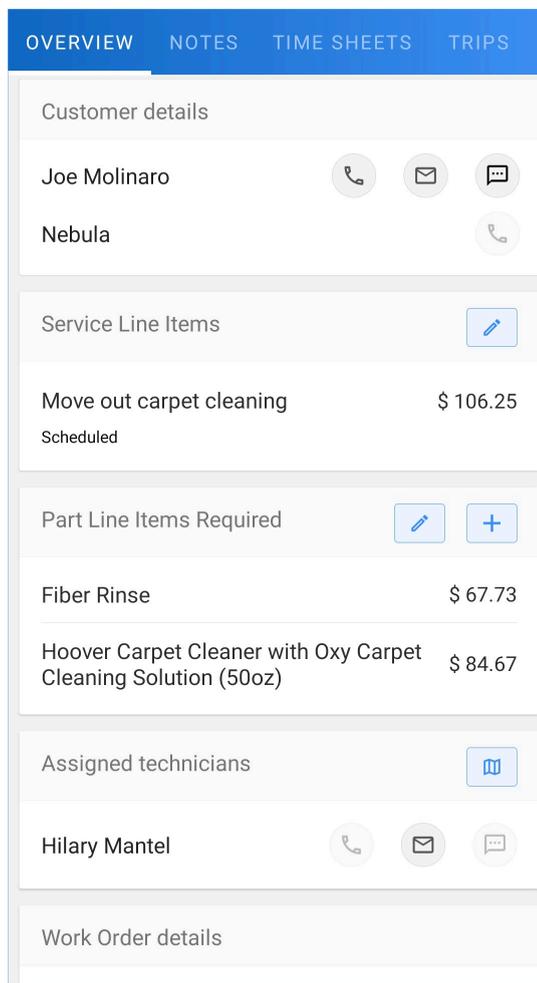
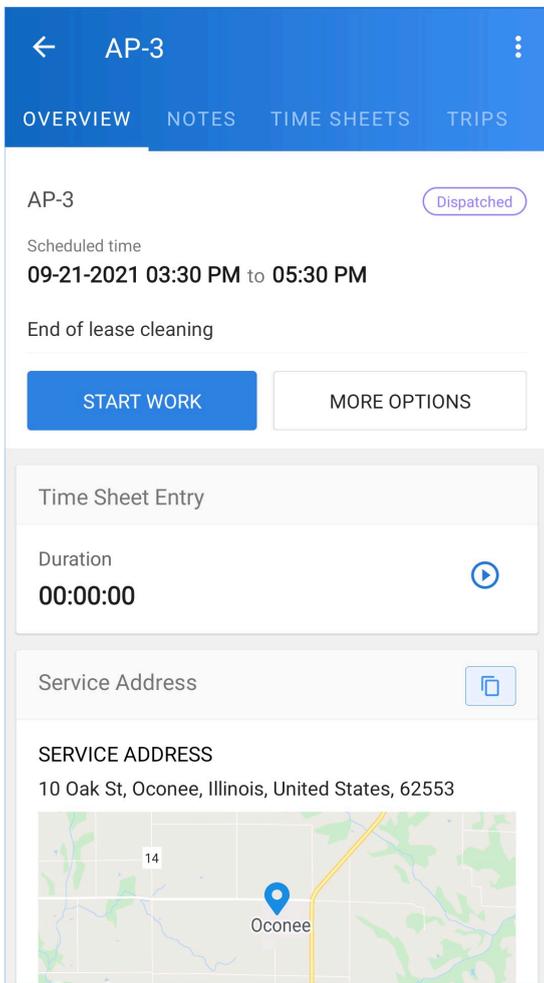
1. Log in to Zoho FSM mobile app and **Check-in**.



If the user is checked-in, the *All Service Appointments* screen for the current date will be displayed. You can also view this screen by clicking **All Service Appointments** from the left menu.

2. Select the service appointment from the *All Service Appointments* screen or the **Home** screen.
3. In the *Appointment Details* screen, click **Start Work**.

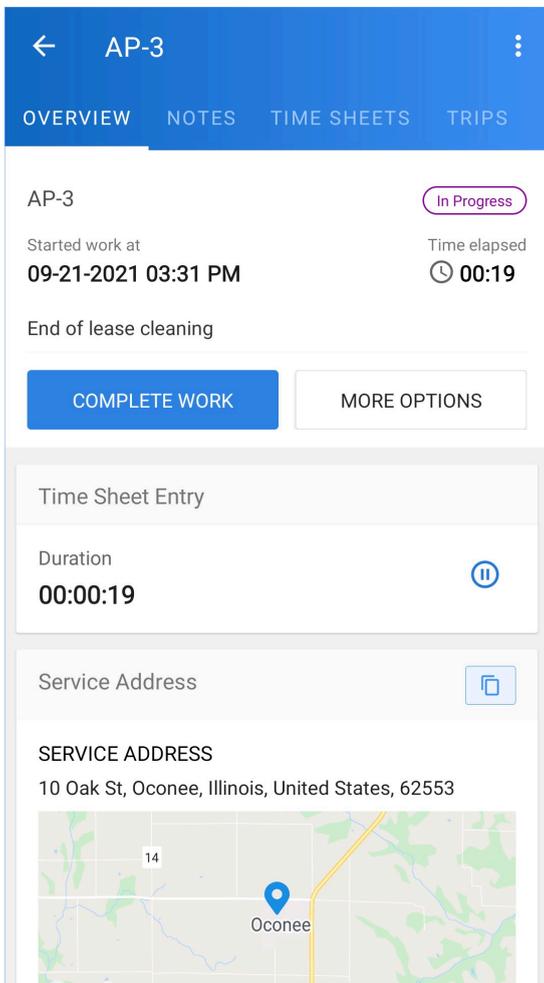
As the field agent commences the work for the service appointment, a timer will start to record the duration of work.



2.5 Complete Work

When you have completed the tasks for the service appointment, you can update the status of the service appointment.

1. Click **Complete Work** when the tasks for the service appointment is done.
The screen for creating a service report is displayed.



2. Create the Service Report to complete the service appointment.
- In the service report, capture the following details and click **Save**:
- Problem Statement** for the service appointment
 - End Date Time** for the service appointment
 - Contact feedback**
 - Contact Signature**

← Create Service Report SAVE

The Service Appointment will be marked complete only after the Service Report has been generated.

Report Information

Problem Statement **Move out carpet cleaning**

* Summary **End of lease cleaning**

Time Information

* Start Date Time **2021 Sep 21, 15:31 PM**

* End Date Time **2021 Sep 21, 15:31 PM**

Customer Feedback

Customer Rating **★★★★☆**

Customer Feedback **Good job**

Service Line Items

Move out carpet cleaning	1 * \$ 100
--------------------------	------------

← Create Service Report SAVE

Customer Feedback

Customer Rating **★★★★☆**

Customer Feedback **Good job**

Customer signature 🗑️



Clear Save

Signature

Name **Joe Molinaro**

Add signature

← Create Service Report SAVE

Move out carpet cleaning	1 * \$ 100
--------------------------	------------

Part Line Items Required

Fiber Rinse	1 Each * \$ 63.75
Hoover Carpet Cleaner with Oxy Carpet Cleaning Solution (50oz)	1 Each * \$ 79.69

Signature

Name **Joe Molinaro**



Date Wise Breakdown of Service Duration

09-21-2021	0:00
Total Hour(s)	0 Hr 0 Min

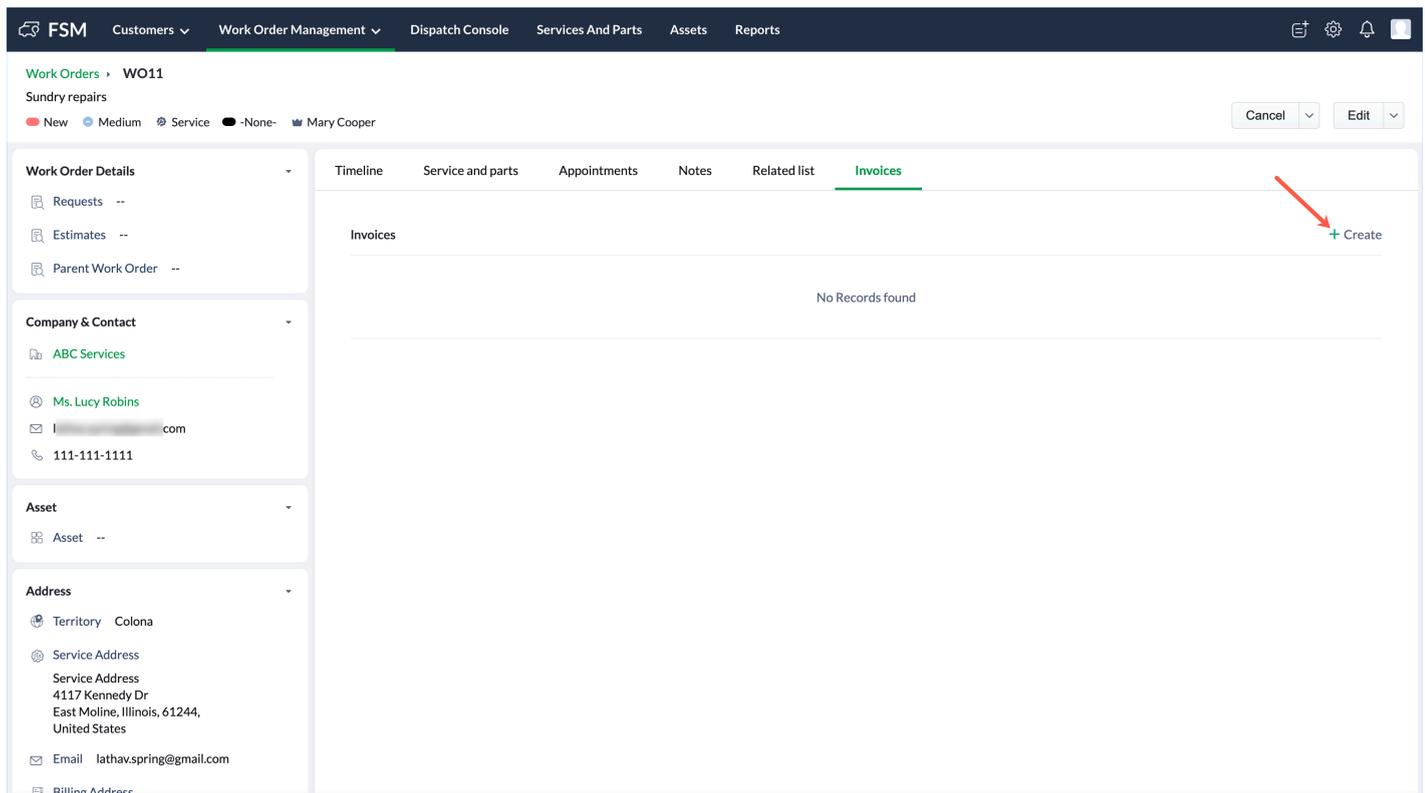
Once the service appointment is completed, you can generate the service report for the service appointment.

Service Report

A document capturing the details of the completion of the service appointment that is verified by the contact.

2.6 Generate Invoice

1. Select the **Work Orders** module from the **Work Order Management** menu and click the work order whose service line items you want to create the invoice for.
2. Under the **Invoices** tab, click **Create**.



3. In the *Create Invoice* overlay, select the service line items you want to create the invoice for and click **Next**.
If an invoice has been generated for a service line item, then that service line item cannot be selected.

Create Invoice ✕

Select the services to which you want to generate invoice. You can generate invoice(s) for a single service or combine two or more services and generate invoice.

<input type="checkbox"/>	Service ID	Service Name	Appointment	All Status ▾	All Billing Status ▾
<input checked="" type="checkbox"/>	SVC-25	Leakage Repair	AP-7	In Progress	None
<input type="checkbox"/>	SVC-26	Plumbing	-	Open	None

4. Provide the necessary details and click **Generate Invoice**.

Create Invoice
✕

Invoice Summary

Invoice Date

Payment Terms

Due Date

Services

Service	Quantity	List Price	Tax Name	Line Item Amount
<div style="display: flex; align-items: center;"> Leakage Repair ✎ </div> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 5px; width: 100%;">Add a Description</div>	1	Hours ▾	80	SalesTax [7% ▾]
85.6				

Parts

Part	Quantity	List Price	Tax Name	Line Item Amount
<div style="display: flex; align-items: center;"> Waterproof Tile 📦 </div> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 5px; width: 100%;">Add a Description</div> <div style="margin-top: 5px; color: #4CAF50; font-size: 0.9em;">Leakage Repair ✎</div>	1	Pack ▾	20	SalesTax [7% ▾]
21.4				

Previous
Generate Invoice

The invoice will be created with the status **Draft**.

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

Work Orders > WO11
Sundry repairs
New Medium Service Partially Invoiced Mary Cooper Cancel Edit

Work Order Details
Requests --
Estimates --
Parent Work Order --

Company & Contact
ABC Services
Ms. Lucy Robins
[redacted].com
111-111-1111

Asset
Asset --

Address
Territory Colona
Service Address
Service Address
4117 Kennedy Dr
East Moline, Illinois, 61244,
United States
Email lathav.spring@gmail.com
Billine Address

Timeline Service and parts Appointments Notes Related list **Invoices**

Invoices + Create

Invoice Number	Status	Date	Due Date	Total	Balance
INV-000005	draft	May 17, 2022	May 31, 2022	\$ 107	\$ 107

5. Click the **Invoice Number** to open the invoice draft and click **Send Invoice**.
You can also record the payment.

 Open In ZohoInvoice
  Download
  Print
 

Draft

Zylker
 Illinois
 U.S.A

INVOICE

INV-000005

Balance Due
\$107.00

Bill To
ABC Services
 901 1st St
 Colona
 61241 Illinois
 United States

Invoice Date : 17 May 2022

Terms : Due end of the month

Due Date : 31 May 2022

#	Item & Description	Qty	Rate	Amount
1	Leakage Repair	1.00	80.00	80.00
	Hours			
2	Waterproof Tile Gap Filler	1.00	20.00	20.00
	Pack			
	Sub Total			100.00
	Sales Tax (7%)			7.00
	Total			\$107.00
	Balance Due			\$107.00

Send Invoice

Record Payment

6. Click **Send** to dispatch the email.

You can email the invoice to one or more recipients. The email addresses associated with the contact will be pre-filled by default.

Send Invoice ✕

Send To

Show Cc Show Bcc

Invoice #INV-000005

Dear ABC Services,

Thank you for your business. Your invoice can be viewed, printed and downloaded as PDF from the link below. You can also choose to pay it online.

INVOICE AMOUNT

\$107.00

Invoice No	INV-000005
Invoice Date	17 May 2022
Due Date	31 May 2022

PAY NOW

Regards,
Mary Cooper
Zylker

The invoice can be generated from the [mobile app](#) as well.

2.7 Record Payment

In the invoice mailed to the contact, there will be a link for the user to make the payment online. Once the payment is done successfully, the status of the service appointment changes to **Paid**. If the payment is done offline (e.g. cash), then you can explicitly change the status of the service appointment as explained below.

1. Select the Work Orders module from the Work Order Management menu and click the work order whose invoices you want to record the payment for.
2. Select the Invoices tab and click on the Invoice Number to open the invoice.
3. Click **Record Payment**.

INV-000005
✕

🔗 Open In ZohoInvoice
📄 Download
🖨️ Print

Zylker
Illinois
U.S.A

Bill To
ABC Services
901 1st St
Colona
61241 Illinois
United States

INVOICE

INV-000005

Balance Due
\$107.00

Invoice Date : 17 May 2022
Terms : Due end of the month
Due Date : 31 May 2022

#	Item & Description	Qty	Rate	Amount
1	Leakage Repair	1.00	80.00	80.00
	Hours			
2	Waterproof Tile Gap Filler	1.00	20.00	20.00
	Pack			
Sub Total				100.00
SalesTax (7%)				7.00
Total				\$107.00
Balance Due				\$107.00

Notes
Thanks for your business.

Send Invoice
Record Payment

4. Click **Record Payment** in the confirmation message. The status of the invoice will change to **Paid**.

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

Work Orders > WO11
Sundry repairs
New Medium Service Partially Invoiced Mary Cooper

Cancel Edit

Work Order Details
Requests --
Estimates --
Parent Work Order --

Company & Contact
ABC Services
Ms. Lucy Robins
l.com
111-111-1111

Asset
Asset --

Address
Territory Colona
Service Address
Service Address
4117 Kennedy Dr
East Moline, Illinois, 61244,
United States
Email lathav.spring@gmail.com
Billing Address

Timeline Service and parts Appointments Notes Related list **Invoices**

Invoices + Create

Invoice Number	Status	Date	Due Date	Total	Balance
INV-000005	paid	May 17, 2022	May 31, 2022	\$ 107	—

2.8 Close Work Order

Once the status of all the service appointments in the work order is **Closed**, the status of the work order changes to **Closed**.

FSM Customers Work Order Management Dispatch Console Services And Products Asset Reports

Work Order > WO5
End of lease cleaning
Closed Medium Service Sep 21, 2021 Tracy Pollan Sep 21, 2021 03:57 pm

Edit

REQUEST
No Request found

ESTIMATE
No Estimate found

CUSTOMER
Contact
Joe Molinaro
test@gmail.com
6564352341
Company
Nebula

ADDRESS
Territory Fillmore
Service Address
Service address
10 Oak St
Oconee, Illinois, 62553,
United States
Billing Address
Billing address
Locust St

SERVICE AND PARTS **APPOINTMENTS** NOTES RELATED LIST

Service Appointments
View, manage, schedule and dispatch service appointments to the field technicians.

NAME	STATUS	ACTUAL START TIME	ACTUAL END TIME
AP-3 End of lease cleaning	Closed	September 21, 2021	September 21, 2021