



Record Templates

Overview of Record Templates

Use **Record Templates** to easily create request, estimate, and work order records using predefined values. By providing a structured format for recording information, record templates help you quickly and accurately capture data in a record, reducing the repetitive manual effort. You can also use Record templates when creating follow up records and converting a record from one module to another.

The following examples will illustrate the use of record templates:

- If you provide services that involve service kits, you can create templates with the service and its affiliated service kits to avoid having to input individual parts of the kit every time you generate a work order.
- Consider that you provide three types of car servicing packages: Bronze, Silver, and Gold. You can create templates for each of the three car servicing packages which contain the specific details, services, duration, and parts included in each package. This way, when you need to create a work order, you can easily use one of these templates to quickly fill in all the required information.
- You might want to implement seasonal promotions in order to enhance your business. For example, as a pool cleaning company, you may offer deals such as debris removal with scrubbing, vacuuming with pH balance restoration, and more. You can create record templates for each of these promotional packages.

ⓘ Permission Required: [Record Template](#)
Check the Edition-based availability of [Record Templates](#).

Create Record Templates

To create a record template:

1. Navigate to **Setup > Field Service Settings > Record Templates** and click **Create Record Template**.
2. Enter the following details, then click **Create**:
 - a. The **Name** of the template
 - b. A **Description** of the template
3. In the *Create [Module_Name] Template* overlay, enter the necessary details and click **Save**.
You can refer to the help documentation for [Requests](#), [Estimates](#), and [Work Orders](#) to know the details of the fields. The custom fields in these modules will also be listed.

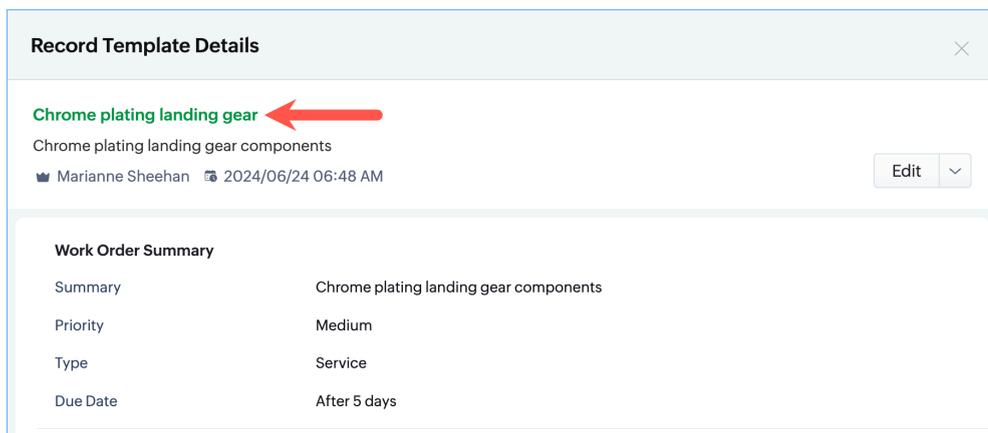
Points to remember

- When you [use](#) a record template while creating a record, then the values, if any, provided in the date fields will be used w.r.t the current date to prefill the *Create [Module_Name]* form.
- Tax details of the services and parts will not be shown in the record template. The tax details, if present, will be populated in the *Create [Module_Name]* form based on the Contact/Company. Please refer to the [Estimates and Work Orders](#) sections of your respective editions to find out how the tax values are considered for the services and parts.
- The number of line items that you can add to a record template will be the same as that for a record in that module. Please refer to the Zoho FSM's pricing [page](#) to know the limits.

Manage Record Templates

You can edit the Name and Description of a record template. To do so:

1. In the *Record Templates List* page, click on the desired record template.
2. Click on the name or description.



3. In the *Edit Record Template* popup, make the necessary changes and click **Save**.

Alternatively, from the *Record Templates List* page, hover over the desired record and click on the **Edit**  icon. Click on the **Edit**  icon next to the record template name. In the *Edit Record Template* popup, make the necessary changes and click **Save**.

Chrome plating landing gear  

Work Order Summary

Summary: Chrome plating landing gear components

Priority: Medium

Type: Service

Due Date: Same Day
 5 Day(s) After

Preference

Preferred Date 1: Same Day
 1 Day(s) After

Preferred Date 2: Same Day
 1 Day(s) After

Preferred Time: Morning

Preference Note:

You can edit or delete the record templates.

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

Setup

Search

- General
- Workforce
- Field Service Settings
 - Work Types
 - Record Templates**
 - Other Settings
- Email
- Maintenance Plans
- Billing

Record Templates Help

Use record templates to simplify data entry, reduce errors, and increase efficiency by streamlining the process of creating new records. Improve the data management practices and productivity of your organization with these templates.

Search

Template Name	Description	Created By	Created On	
Chrome plating landing gear	Chrome plating landing gear components	Marianne Sheehan	2024/06/24 06:48 AM	  <input type="button" value="Delete"/>

Using Record Templates

You can use the record template while creating a record to prefill the record with the values in the record template. To do so:

1. In the *Create [Module_Name]* form, select the desired record template from the drop-down at the top.
2. The data in the record template will be populated into the form.
Make the necessary changes you want.
3. Proceed with creating the record.

Create Work Order

Empty 

Work Order Summary

Summary Chrome plating landing gear
Chrome plating for landing gear components

Priority

Type

Due Date

Currency

Exchange Rate

Contact Details

Company 

Contact 

Email

Phone