



# Requests

Requests are initiated to render services to customers. Services are the offerings you provide as part of your field services. Customers can contact a call center agent to raise the request on their behalf. You can create requests from the Zoho FSM web and mobile apps, [webforms](#), and the [create request API](#).



Available in Editions: **All Editions**

## Create Requests

**i** Permission Required: [Requests](#)

To create a request:

1. Select the **Requests** module from the **Work Order Management** menu and click **Create**.
2. Enter the following details, then **Save**:

- a. A **Summary** of the request
- b. A **Priority**
- c. A **Due Date** by which the request should be closed
- d. The **Contact** for whom the request is being created

You can perform an advanced search for contacts by clicking the Search Contact [] icon.

- e. The **Company** the contact belongs to.
- f. The **Phone** number of the contact
- g. The **Email** address of the contact
- h. An **Asset**

An Asset is added when the service is for a product that you have sold.

Create Request

Cancel
Save and New
Save

**Request Details**

Summary

Priority

Due Date

**Contact Details**

Contact

Company

Email

Phone

**Asset Details**

Asset

i. A **Territory**

This field will be displayed only if territories other than the [default service territory](#) have been added.

j. A **Service Address**

This is the address where the service needs to be carried out. The service address present for the Asset, Company, or Contact will be used, in this order of preference. You can choose any other available address or click **Create New**.

Upon clicking **Create New**, the *Add Address* overlay will be displayed. To add a new address, enter the details and click **Save**. You can either choose to add an address to the Company/Contact or create a Single Use Address. The Single Use Address can be used only in the current Request record.

Click [here](#) for the address edit options.

k. A **Billing Address**

l. **Preferred Date1**, and **Preferred Date2** for the service call

m. A **Preferred Time**.

n. Any additional **Preference Note** regarding the service call

o. A **Currency**.

The Currency and Exchange Rate will only be displayed if [multiple currencies](#) are enabled.

Create Request

Cancel
Save and New
Save

**Address**

Territory

Service Address 

SERVICE ADDRESS

10 Oak St,  
Oconee, Illinois, 62553,  
United States

Tax : IllinoisSalesTax(6.25%)

Billing Address 

BILLING ADDRESS

Locust St,  
Oconee, Illinois, 62553,  
United States

Tax : IllinoisSalesTax(6.25%)

**Preference**

Preferred Date 1

Preferred Date 2

Preferred Time

Preference Note 

On weekdays, the preferred time is the afternoon. On weekends, anytime is fine.

**Currency**

Currency

Exchange Rate

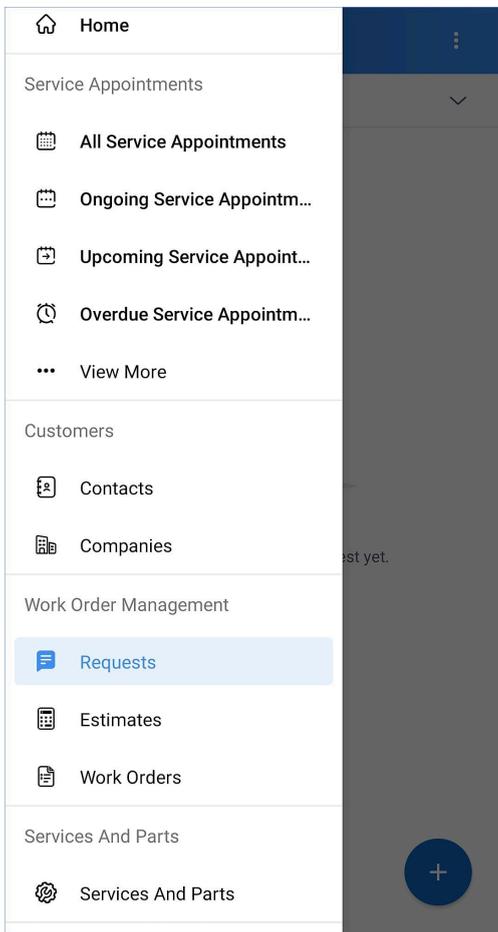
Once the request is approved, either an estimate or work order can be created with the information in the request. Refer to [this](#) section for mapping details.

Any estimates and work orders created for this request will be displayed in the *Details* page of the request.

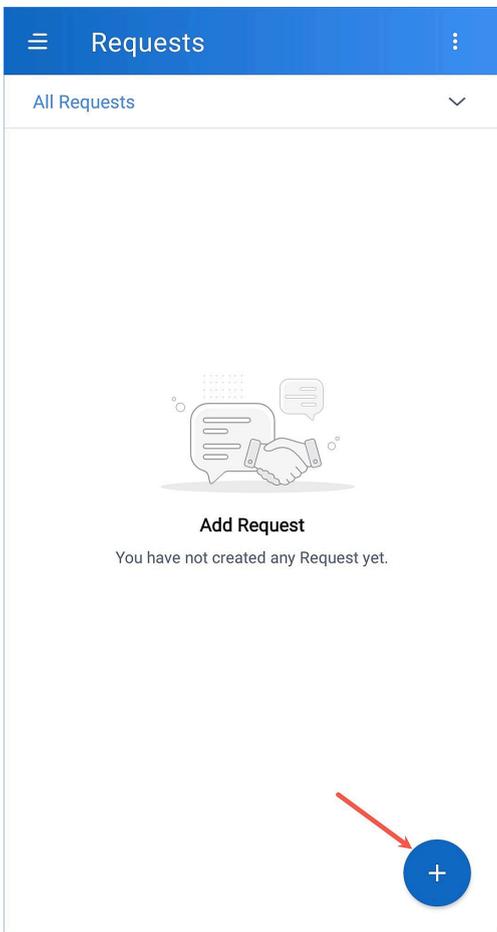
## Add Requests from Mobile App

To create a request from the mobile app:

1. Select **Requests**, in the left menu.



2. In the *Requests* screen, tap the add [+] icon.



3. In the *Create Request* page, enter the necessary details and click **Save**.

← Create Request
Save

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**Request Details**

* Summary	Bathroom Plumbing
Priority	Critical <span style="float: right;">▼</span>
Due Date	26 Apr 2023 <span style="float: right;">📅</span>

**Contact Details**

Company	Zylker Inc. <span style="float: right;">&gt;</span>
* Contact	Mr. Edward Cormoran <span style="float: right;">&gt;</span>
Email	edward.cormoran@zylker.com
Phone	333-333-3333

**Asset Details**

Asset	>
<a href="#">Scan QR/Barcode</a>	

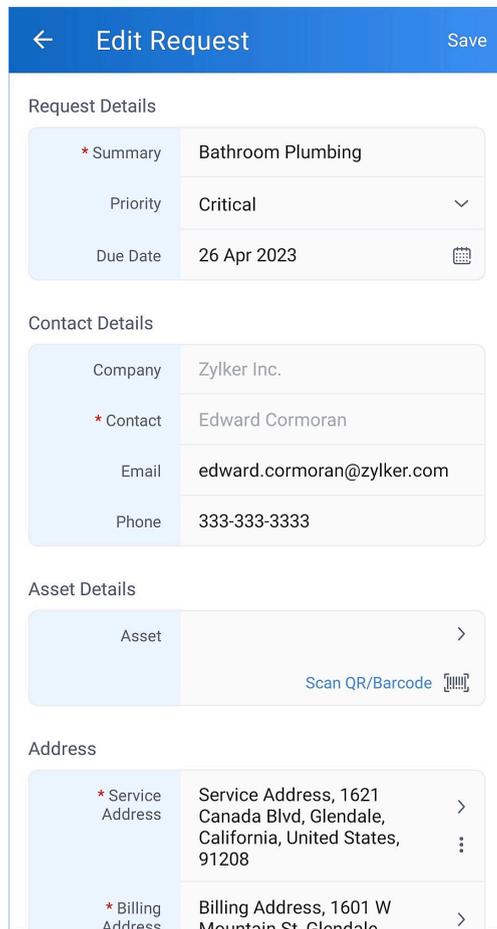
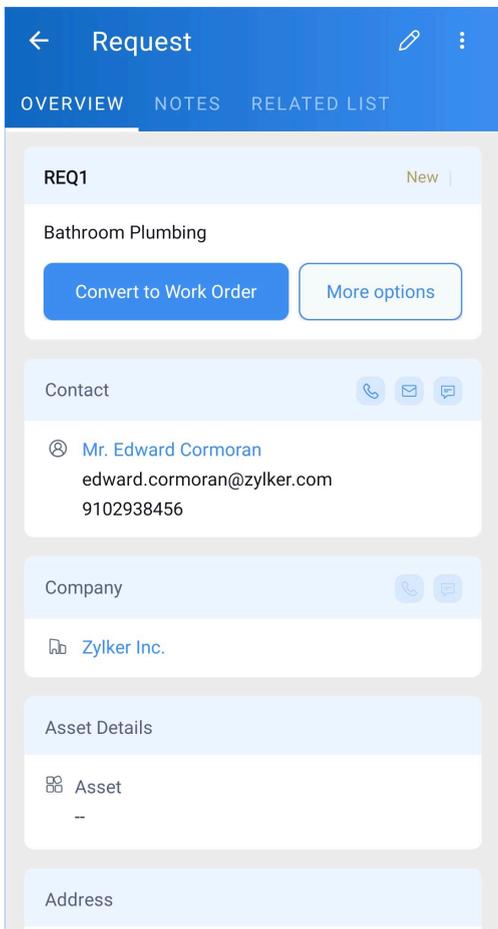
**Address**

* Service Address	Service Address, 1621 Canada Blvd, Glendale, California, United States, 91208 <span style="float: right;">&gt;</span>
* Billing Address	Billing Address, 1601 W Mountain St, Glendale <span style="float: right;">&gt;</span>

4. In the lookup fields, you can do an [advanced search](#).
5. In the address fields, you can [add](#) addresses.
6. The Currency and Exchange Rate will be displayed only if [multiple currencies](#) are enabled

The created request can be edited. To edit an request:

1. Click the **Edit** icon on the top right side.
2. Make the necessary changes and click **Save**.



You can also add notes, and view the related records.