



Service Appointments

Service appointments are jobs created for carrying out the services in a work order. These service appointments are assigned to field agents or crew who will then perform the services at the contact location. As many service appointments as the services in the work order can be created. The service appointments can be viewed under the **Service Appointments** module. Service appointments can be created and managed here. Appointments can also be created from within a [work order](#).



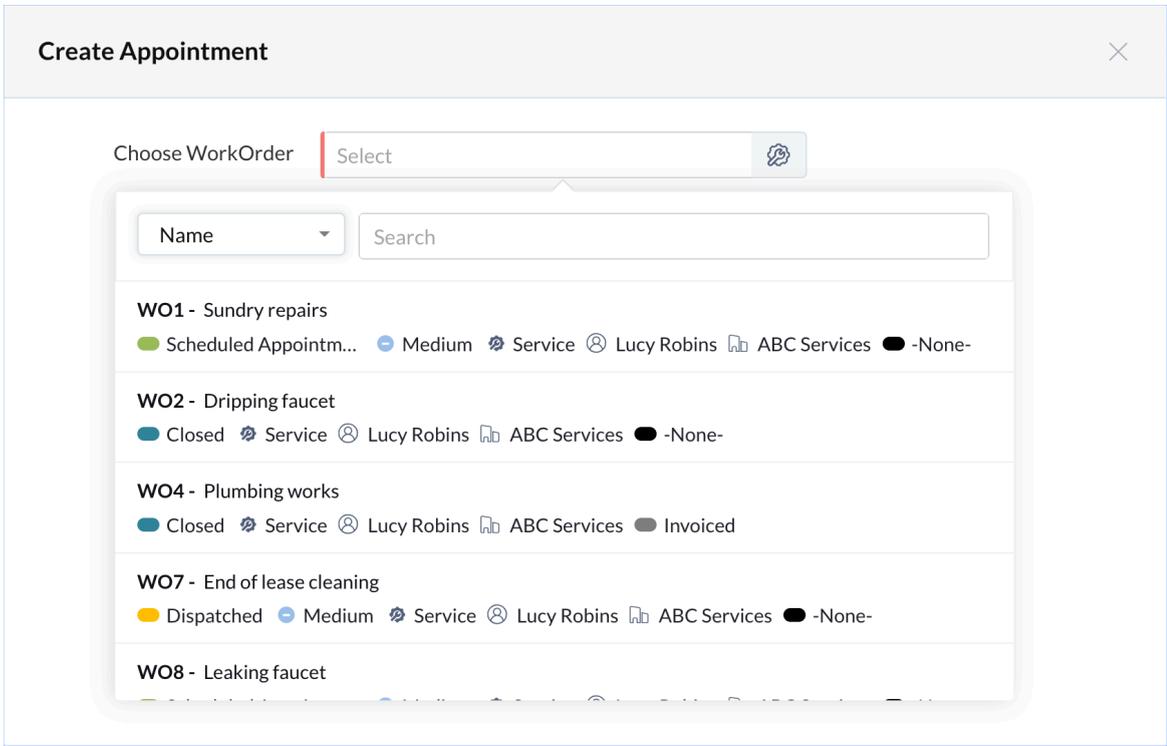
Available in Editions: **All Editions**

Create Service Appointments

- ① - **Permission Required:** [Service Appointments](#)
- Find out the Edition-specific limits for [Service Appointments](#).

To create a service appointment:

1. Select **Service Appointments** from the **Work Order Management** menu and click **Create**.
2. Select the work order that you want to create the service appointment for.



The details of the selected work order are displayed.

Create Appointment
✕

Choose WorkOrder

Work Order Details

WO48 Sundry works

● New 🔗 Service 👤 Daniel Warne

Service ✕

✕

Summary

Currency

Exchange Rate

Asset

Scheduled Start Date Time (GMT -07.00)

Scheduled End Date Time (GMT -07.00)

Service Resource

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

- a. The values for **Scheduled Start Date Time** and **Scheduled End Date Time**.

The **Scheduled Start Date Time** and **Scheduled End Date Time** should be within the same day. Use [multi-day scheduling](#) to schedule an appointment spanning multiple days.

- b. A **Service Resource** (Agent or Crew)

One or more resources can be assigned to the appointment. Only when the **Scheduled Start/End Date Time** is selected will the service resources be listed.

The following agents or crews will be available for assignment:

- Active [agents](#) or [crews](#) assigned to the territory that is chosen in the work order
- The agents and crews who are active in the territory between the **Scheduled Start Date Time** and **Scheduled End Date Time**

- During the time when an agent is part of a crew, they will not be available as an individual resource.

Hover over the name of an unavailable agent to know the reason for their unavailability.

Create Appointment

Service: Move out carpet cleaning (SVC-23)
New, Quantity: 1

Summary: End of lease cleaning

Asset: Search Asset

Scheduled Start Date Time: Nov 04, 2022 05:30 PM (GMT -07:00)

Scheduled End Date Time: Nov 04, 2022 06:30 PM (GMT -07:00)

Service Resource: Select

Agent Search

Available Agents
William Turner

Unavailable Agents
Daniel Warne
Ross Smith
Currently part of a crew

Cancel Schedule

4. Click **Confirm** in the confirmation message.

Confirmation

The Appointment is scheduled from Apr 12, 2022 12:00 PM to Apr 12, 2022 01:00 PM.

It is assigned to Alan Conway

Cancel Confirm

The service appointment details page will be displayed. This page will display the name of the work order for which the service appointment has been created. You can also dispatch, reschedule, terminate, and Cancel an appointment from this page.

Service Appointments > WO48 > AP-49

Sundry works

Scheduled Emily Raymond

SA Information

- Service(s)
 - AC Installation (SVC-108)
 - Leakage repair (SVC-109)
- Scheduled Time
 - May 26, 2022 11:00 AM (GMT -07:00)
 - May 26, 2022 12:00 PM (GMT -07:00)
- Actual Time
 - Appointment not yet started
- Assigned Resources
 - Emily Raymond (Lead)

Other Details

- Company Nebula
- Contact Lucy Robins
- Asset --
- Due Date --

Address Details

- Territory Westbrook
- Service Address
 - Service Address
 - 9219 N Lindbergh Drive
 - Peoria, IL, 61104,
 - United States of America

Timeline **Service and parts** Time sheets Service report Trips Notes

Services

Service Line Item Name	Service	Quantity	List Price	Discount	Tax Name	Line Item Amount
SVC-108 🕒 In Progress 🗑 None	AC Installation --	1	\$ 150	--	Sales tax [7%]	\$ 160.5
SVC-109 🕒 In Progress 🗑 None	Leakage repair --	1 Hours	\$ 150	--	Sales tax [7%]	\$ 160.5

Parts

Part Line Item Name	Part	Quantity	List Price	Discount	Tax Name	Line Item Amount
PRT-112	2 Ton 5 Star Split AC -- Service Line Item SVC-108	1 Quantity	\$ 200	--	Sales tax [7%]	\$ 214
PRT-113	Waterproof Tile Gap Filler -- Service Line Item SVC-109	1 Pack	\$ 20	--	Sales tax [7%]	\$ 21.4

Sub Total \$ 520
Tax Amount \$ 36.4
Adjustment --
Total \$ 556

Dispatch Edit

Cancel
Terminate
Reschedule

The appointment created can also be viewed under the **Appointments** tab of the work order for which the service appointment has been created. Under the **Service and parts** tab of the work order, you can see the appointment created for each service line item. Hover over the appointment icon [🕒] next to the **Service Line Item Name** to see the appointment details. Click to navigate to the *Appointment Details* screen.

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

Work Orders > WO48
Sundry works
Scheduled Appointment Service -None- Daniel Warne

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

Company & Contact
Nebula
Ms. Lucy Robins
lucy.robins@zylker.com
8554

Asset
Asset --

Address
Territory Westbrook
Service Address

Timeline Service and parts Appointments Notes Related list Invo

Services

Service Line Item Name	Service	Quantity	List Price	Dis
SVC-108 In Progress None	AC Installation	1	\$ 150	
SVC-109 In Progress None	Leakage repair	1 Hours	\$ 150	

Parts

Part Line Item Name	Part	Quantity	List Price	Dis
PRT-112	2 Ton 5 Star Split AC -- Service Line Item SVC-108	1 Quantity	\$ 200	
PRT-113	Waterproof Tile Gap Filler --	1 Pack	\$ 20	

Creating Service Appointment for a Service

You can create a service appointment for a work order or for the individual services. Appointments for the services can be created as explained below:

To create a service appointment for a service line item:

1. Follow steps 1-2 mentioned [above](#).
2. Enter the following details, then click **Schedule**:
 - a. In the **Service** field, retain the services or [service tasks](#) you want to create the appointment for.
 - b. The values for **Scheduled Start Date Time** and **Scheduled End Date Time**.
The **Scheduled Start Date Time** and **Scheduled End Date Time** should be within the same day.
Use [multi-day scheduling](#) to schedule an appointment spanning multiple days.
 - c. A **Service Resource** (Field Agent or Crew)
One or more resources can be assigned to the appointment.

Create Appointment ✕

Select WorkOrder ✕ ☰

Service ✕ ☰
 ✕ ☰

Summary

Asset ☰

Scheduled Start Date Time

Scheduled End Date Time

Service Resource ✕ ▾

▾

Once service appointments have been created for all the service line items of a work order, then new service appointments can be created only after the existing ones have been cancelled or terminated. In this scenario, a message will be displayed as shown in the screenshot below.

Create Appointment ✕

Select WorkOrder ✕ ☰

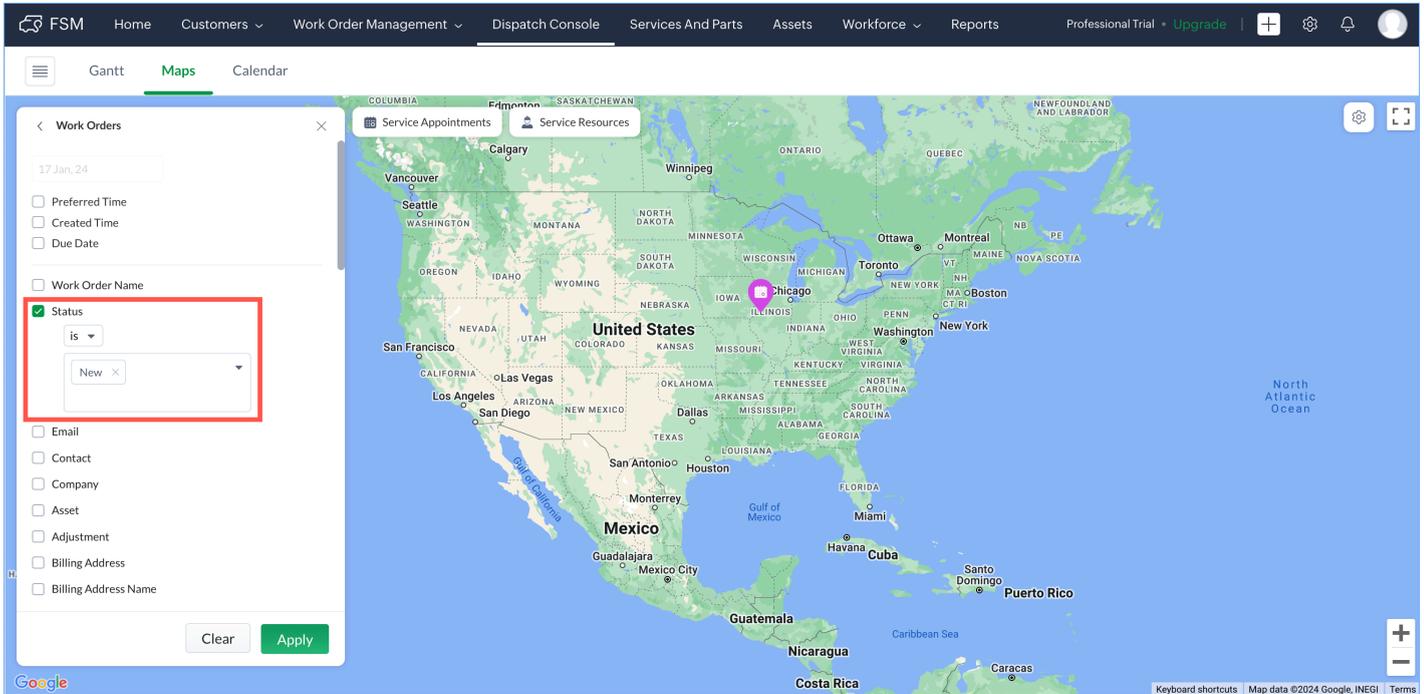
No service available

Multi-Appointment Scheduling

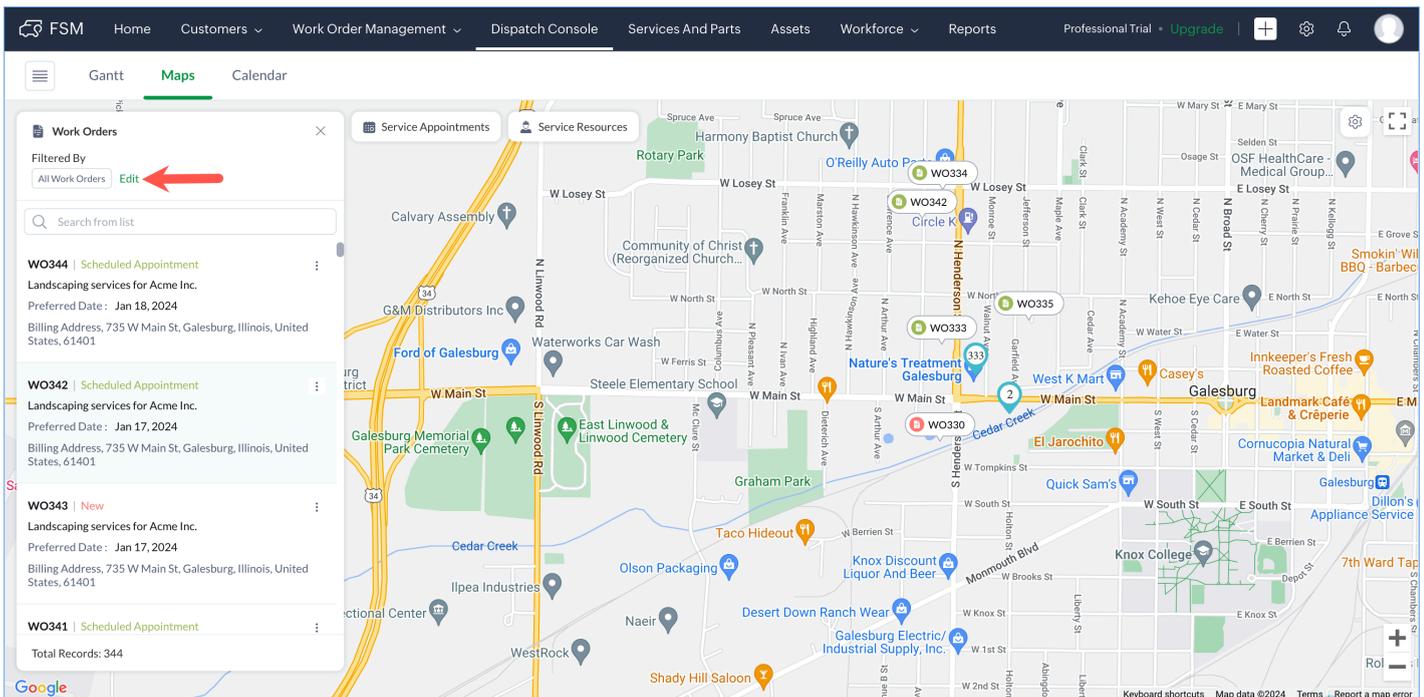
At a time, you can schedule multiple service appointments from the work orders. This option is available in the Maps view of the Dispatch Console.

To schedule multiple appointments:

1. Navigate to the **Dispatch Console** module and click the **Maps** tab.
2. Click the **Work Orders** filter.
3. Filter the work orders by the **New Status**.

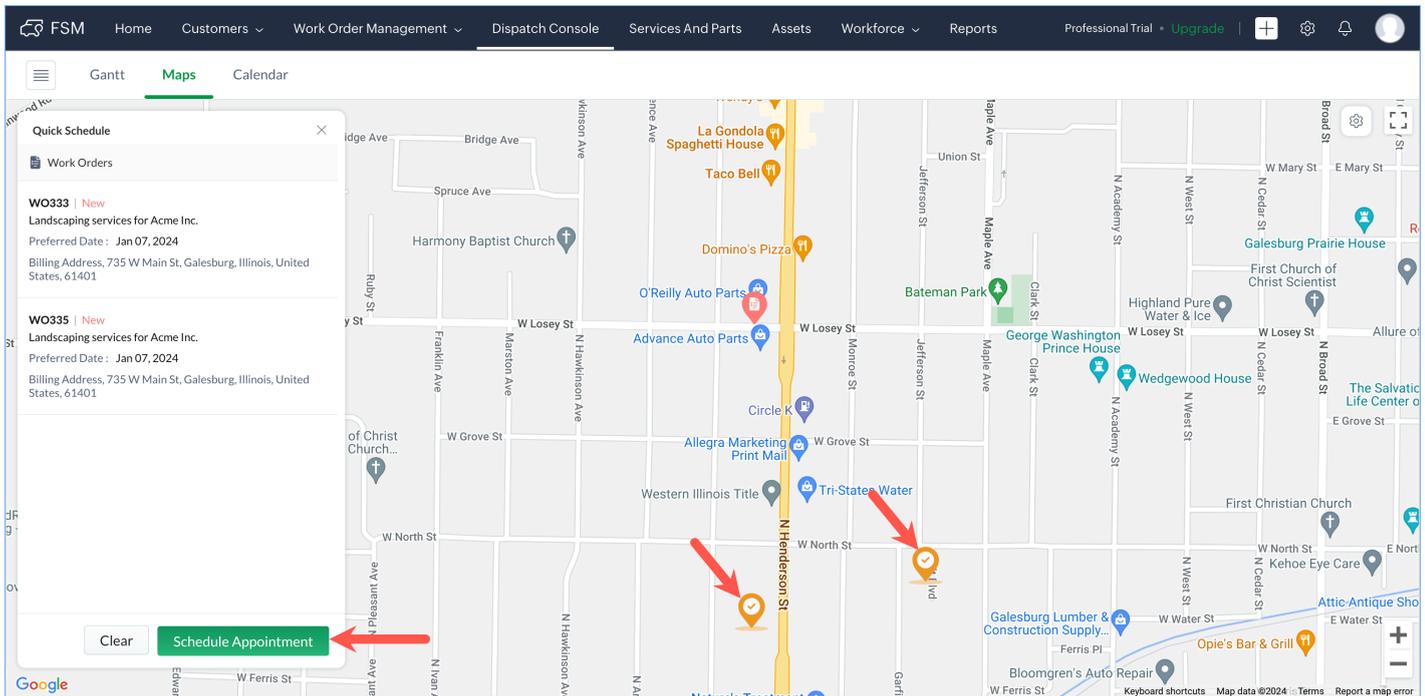


To filter the work orders, click **Edit** next to **Filtered By**.



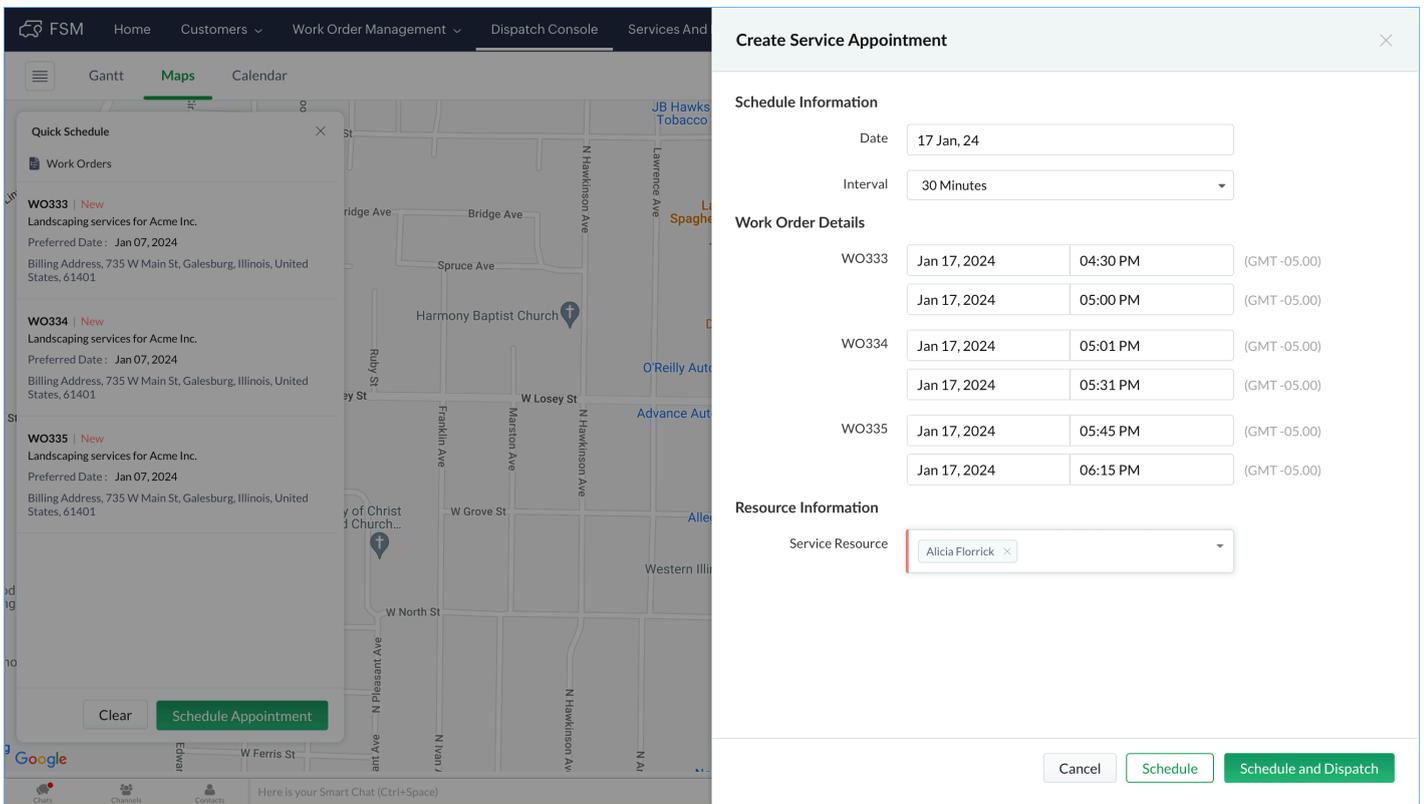
4. Hold the **Command** (for Mac) / **Ctrl** (for Windows) key and click on the markers for the work order for which you want to create the service appointments and click **Schedule Appointment**.

The selected markers will be indicated as  or . The selected work orders will be listed in the left panel. You can select a maximum of 10 work orders.

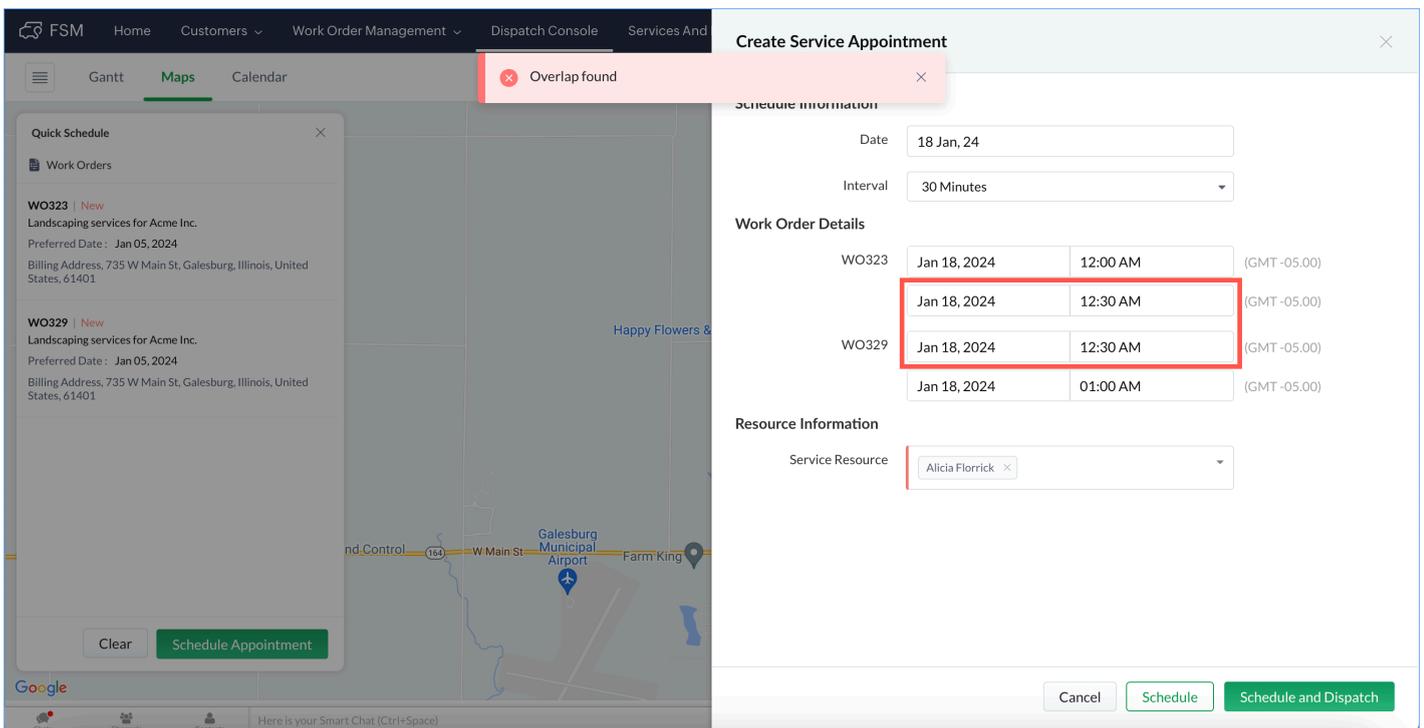


5. Select the desired scheduled dates, assign the service resources, and click **Schedule** or **Schedule and Dispatch**.

By default, the schedule dates will be prepopulated based on the [Business Hours](#). If business hours are not configured, then schedule dates starting from 12 am will be prepopulated. The time gap between the End Time of an appointment and the Start Time of the next will be based on the **Interval** selected.



You should schedule the appointments such that their timings don't overlap.



The created service appointments will be listed.

Service Appointment Summary

Work Order ID	Scheduled Time	Action
WO333	Jan 17, 2024 04:30 PM (GMT -05:00) - Jan 17, 2024 05:00 PM (GMT -05:00)	View Service Appointment
WO334	Jan 17, 2024 05:01 PM (GMT -05:00) - Jan 17, 2024 05:31 PM (GMT -05:00)	View Service Appointment
WO335	Jan 17, 2024 05:45 PM (GMT -05:00) - Jan 17, 2024 06:15 PM (GMT -05:00)	View Service Appointment

You will not be allowed to choose work orders assigned to different territories.

Work Orders with similar Territory must be selected.

WO343 | New
Landscaping services for Acme Inc.
Preferred Date: Jan 17, 2024
Billing Address: 735 W Main St, Galesburg, Illinois, United States, 61401

Points to remember

- You can only choose work orders in the New status to create the appointment.
- For the work orders chosen, all the service line items in the New status will be considered while creating the appointment.

Multi-day appointments

You can create appointments that span over multiple days. This will help you schedule appointments for complex or time-consuming services. E.g. Installing large or complex equipment may require technicians to spend multiple days on-site to ensure proper installation and set-up. This could include tasks like wiring, configuration, testing, and training. Multi-day appointments can only be created in the [Professional](#) edition of Zoho FSM. Please refer to [this](#) section to know how the appointment usage will be calculated for multi-day appointments.

Create Service Appointment

Service Appointment Summary

Service: AC Installation (SVC-181)
New, Quantity: 1

Summary: Installation of HVAC system at the 10-storey Dunder Mifflin building

Type: Service

Asset: Search Asset

Currency: USD

Exchange Rate: 1

Scheduled Start Date Time: 13 Aug 2024 09:00 AM

Scheduled End Date Time: 15 Aug 2024 12:00 PM

Service Resource: Rob Reiner

Cancel Schedule Schedule and Dispatch

Edit Service appointments

To edit service appointments:

1. Select **Service Appointments** from the **Work Order Management** menu.
2. Click the service appointment you want to edit and in the *Service Appointment details* page, click **Edit**.
3. Click **Save** after making the changes.

Delete Service appointments

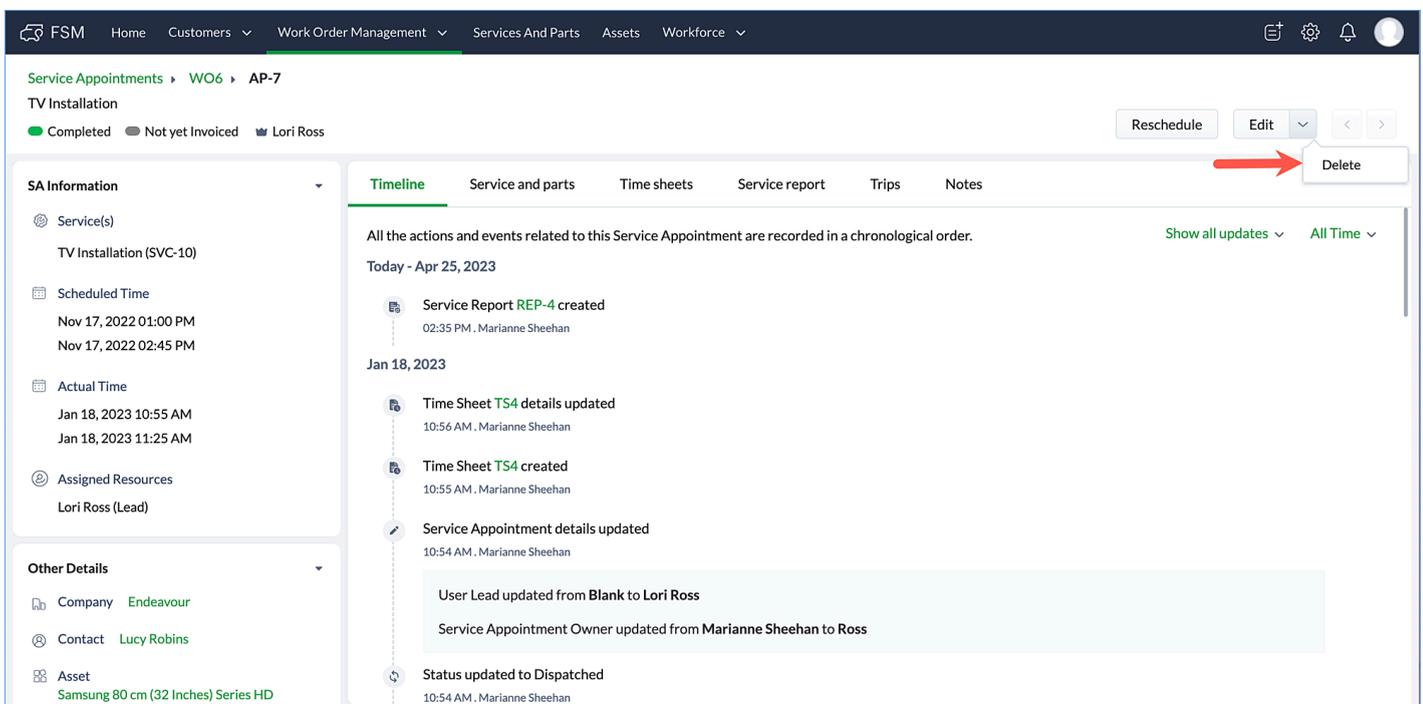
To delete a service appointment, you need to have the following permissions:

- **Delete** permission of [Service Appointments](#)
- **Delete** permission of the following related records:
 - Time sheets
 - Service report
 - Trips
 - Notes and Attachments

The deletion of the related records will also depend on whether you have the permission to delete either **All Records** or **Own Records** of the related records.

To delete a service appointment:

1. Select **Service Appointments** from the **Work Order Management** menu and click the service appointment you want to delete.
2. In the *Service Appointment Details* page, click **Delete** from the **Edit** button.



The screenshot displays the Zoho FSM interface for a Service Appointment. The breadcrumb trail is 'Service Appointments > WO6 > AP-7'. The appointment is titled 'TV Installation' and is in a 'Completed' state, assigned to 'Lori Ross'. The 'Edit' button is open, showing a dropdown menu with a 'Delete' option highlighted by a red arrow. The main content area shows a 'Timeline' of events, including 'Service Report REP-4 created', 'Time Sheet TS4 details updated', 'Time Sheet TS4 created', 'Service Appointment details updated', and 'Status updated to Dispatched'. The left sidebar contains 'SA Information' and 'Other Details' sections.

Alternatively, in the *Service Appointment List* page hover over a service appointment, click the **More Options** [:] icon and select **Delete**.

Appointment Name	Summary	Status	Asset	Contact	Company	Created Time	
AP-8	TV Mounting	Completed		Lucy Robins	Endeavour	Jan 18, 2023 11:11 AM	
AP-7	TV Installation	Completed	Samsung 80 cm (32 Inches) Seri...	Lucy Robins	Endeavour	Nov 17, 2022 12:34 PM	
AP-6	TV Installation	Scheduled	Samsung 80 cm (32 Inches) Seri...	Helen Fahey		Nov 16, 2022 11:11 AM	Delete
AP-5	TV Installation	Scheduled		Helen Fahey		Nov 09, 2022 12:35 PM	
AP-4	TV Installation	Completed		Helen Fahey		Aug 11, 2022 11:44 AM	
AP-3	TV Installation	Completed		Helen Fahey		Jul 29, 2022 05:02 PM	
AP-2	TV Installation	Completed		Helen Fahey		Mar 31, 2022 06:54 PM	
AP-1	TV Installation	Completed		Helen Fahey		Mar 29, 2022 03:37 PM	

3. Click **Delete** in the *Delete Service Appointment* popup.

Delete Service Appointment

Along with the appointment, all the following related records (if any) will be deleted

- Timesheet
- Trips
- Service Reports
- Notes and Attachments

Delete action is not reversible. Are you sure to delete it?

Note

- Make use of "Cancel" in order to retain the data and free up the Agents.
- Make use of "Reschedule" to change the appointment timing.
- The monthly appointment count will be calculated based on the number of appointments created. Deleting the appointment won't reduce the usage count.

Cancel
Delete

If the user doesn't have permission to delete any of the related records, then they will not be able to delete the service appointment.

Note: Service appointments of any status can be deleted.

i Points to remember

- The deleted appointments will be deducted from the number of [appointments](#) available for a month.
- Instead of deleting the service appointment and losing data, you can consider [Cancelling](#) the service appointment.
- In case you want to change the appointment timing, you can consider [Rescheduling](#) the appointment.
- When a service appointment is deleted, an entry will be included in the timeline of the parent work order indicating this.

Complete Service Appointments

To complete a service appointment:

1. Select **Service Appointments** from the **Work Order Management** menu.
2. Click the service appointment you want to complete and in the *Service Appointment details* page, click **Complete Work**.
3. In the confirmation message, click **Proceed**.

The screenshot displays the Zoho FSM interface for a service appointment. A confirmation dialog is centered on the screen, titled "Complete Service Appointment AP-66". The dialog contains a checkbox labeled "Complete associated Work Order W051?". Below the checkbox are two buttons: "Cancel" and "Proceed". A red callout bubble with the number "2" points to the "Proceed" button. In the top right corner of the interface, another red callout bubble with the number "1" points to a "Complete Work" button. The background interface shows the appointment details for AP-66, including a list of service line items and parts.

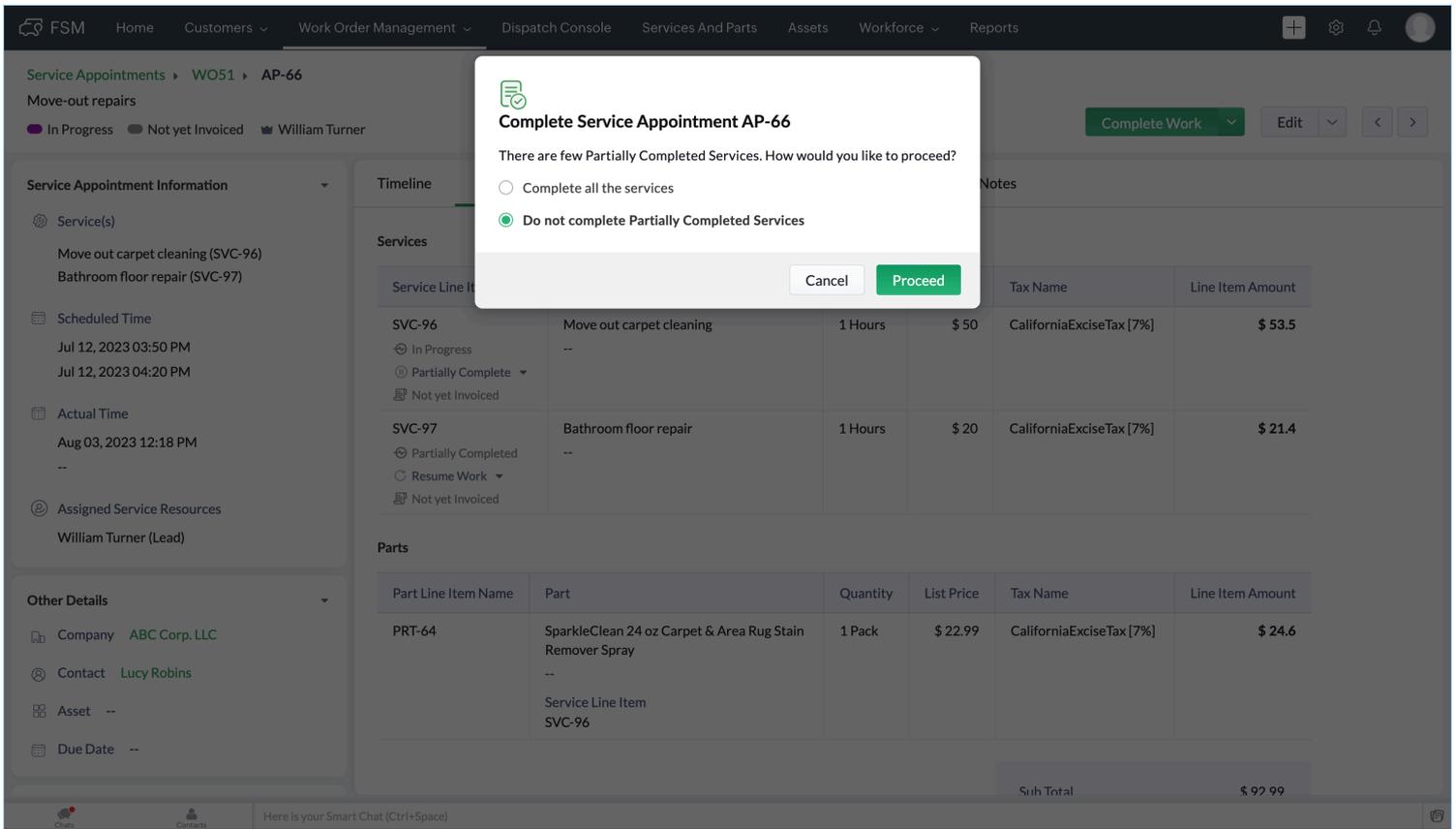
Service Line Item Name	Service	Quantity	List Price	Tax Name	Line Item Amount
SVC-96	Move out carpet cleaning	1 Hours	\$ 50	CaliforniaExciseTax [7%]	\$ 53.5
SVC-97	Bathroom floor repair	1 Hours	\$ 20	CaliforniaExciseTax [7%]	\$ 21.4

Part Line Item Name	Part	Quantity	List Price	Tax Name	Line Item Amount
PRT-64	SparkleClean 24 oz Carpet & Area Rug Stain Remover Spray	1 Pack	\$ 22.99	CaliforniaExciseTax [7%]	\$ 24.6

The above confirmation message will appear if the status of the service line items is either In Progress, or Completed.

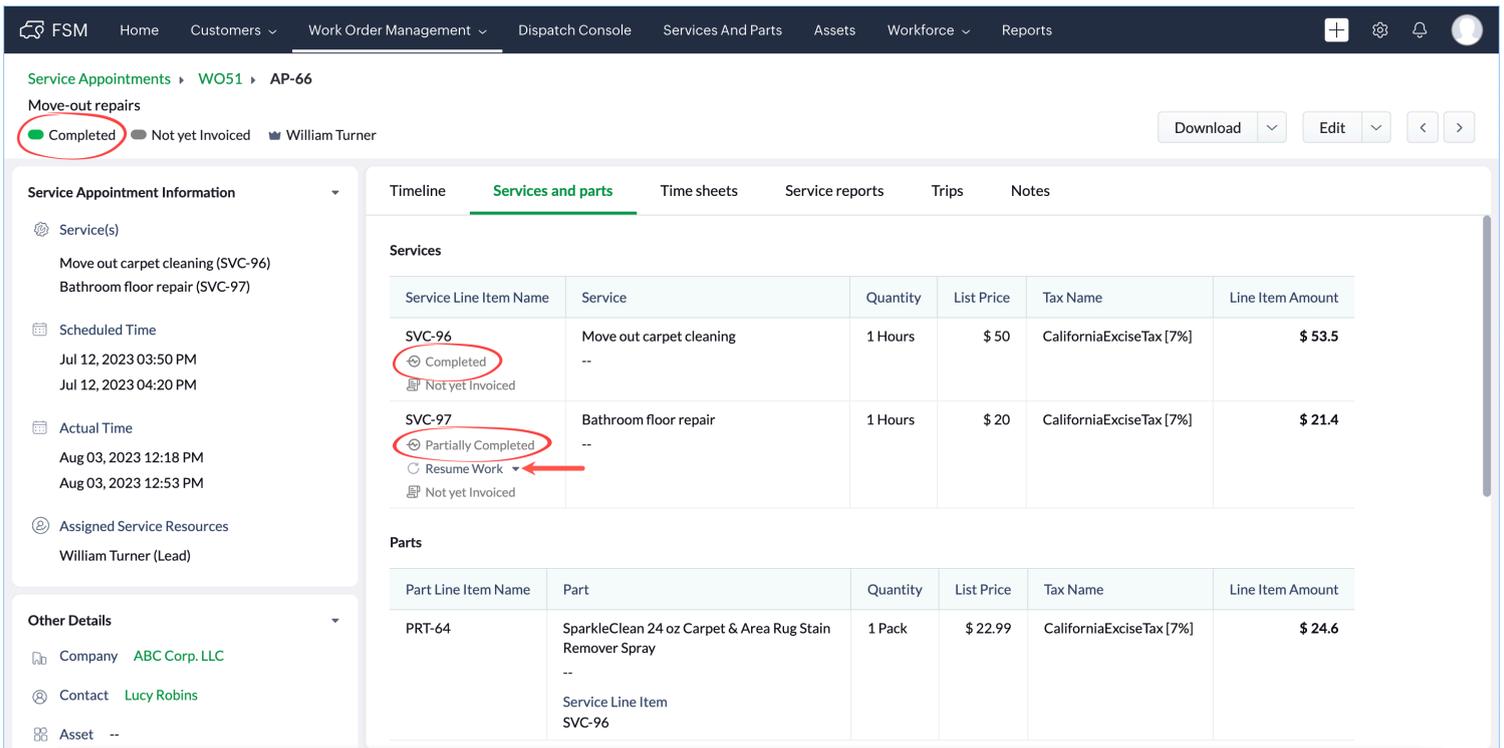
If the status of one of the service line items is Partially Completed, then when you complete the service appointment, you will have two options:

- Complete all the services
- Do not complete partially completed services



Complete all the services: If you choose this option, the status of the service line items will change to Completed and the status of the service appointment will change to Completed.

Do not complete partially completed services: The status of the service appointment will change to Completed. The status of the Partially Completed service line items will remain as is and the status of the other service line items will change to Completed. You can Resume Work on the Partially Completed service line items at any time.



Cancel Service appointments

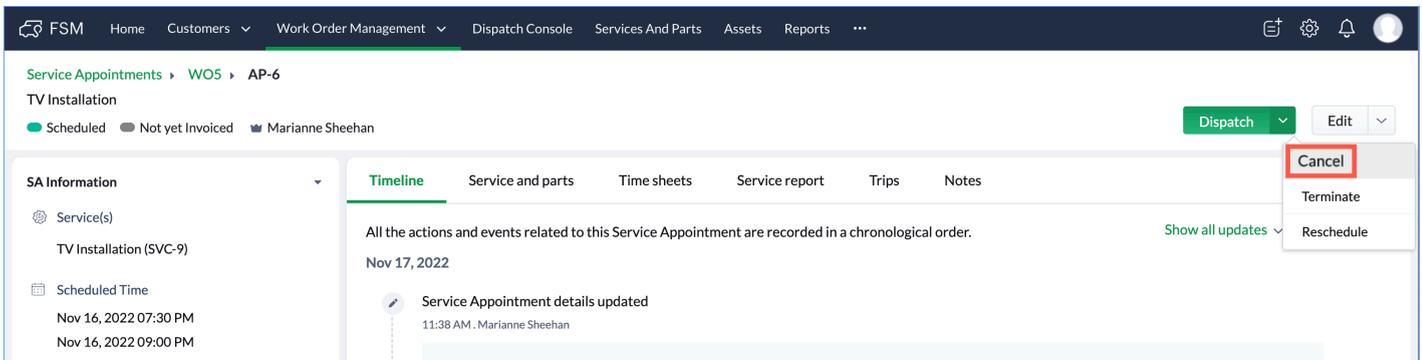
There may be instances when you do not want to proceed with a service appointment. For example, customer who had requested for an AC installation decides to not go ahead with the installation for the time being. In this case, the service appointment created for the this request will have to be cancelled.

When a service appointment is cancelled, its status changes to **Cancelled**.

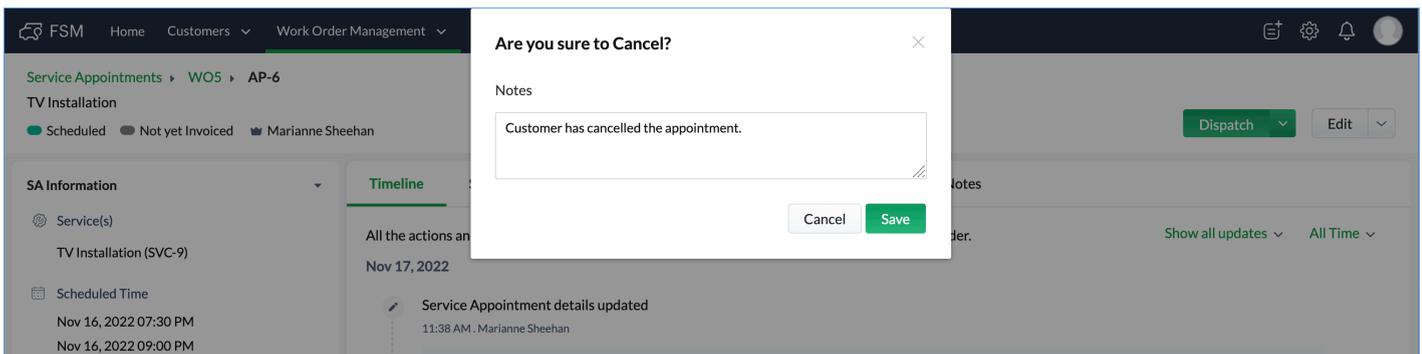
To cancel a service appointment:

1. Select **Service Appointments** from the **Work Order Management** menu.
2. Click the service appointment you want to cancel and in the *Service Appointment details* page, click **Cancel**.

The Cancel option will be available till the service appointment is completed.



3. Click **Save** in the confirmation message.



Terminate Service appointments

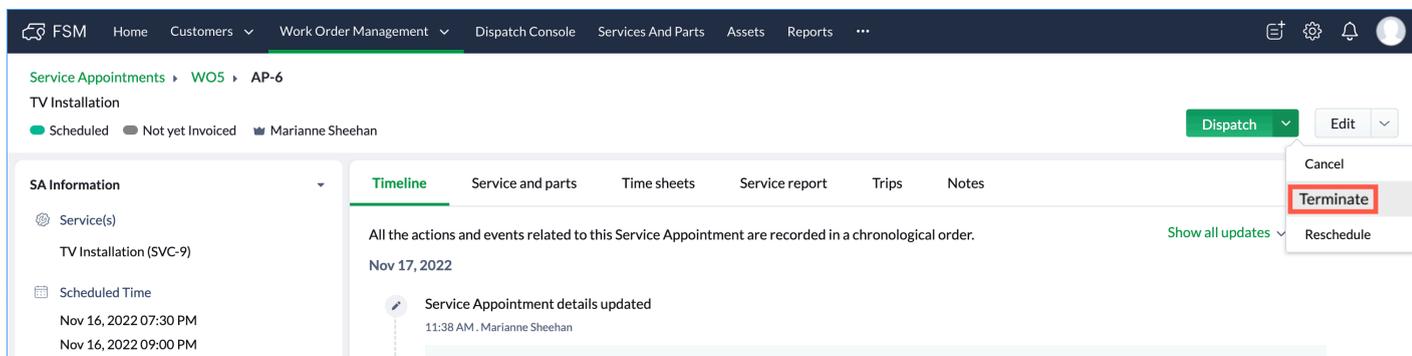
There may be instances when you cannot proceed with a service appointment. For example, the field agent goes to the service location and finds out that the customer is not present at the service location, or the field agent is unable to carry out their task due to faulty equipment. In these cases, the service appointment created for the this request will have to be terminated.

When a service appointment is terminated, its status changes to **Cannot Complete**.

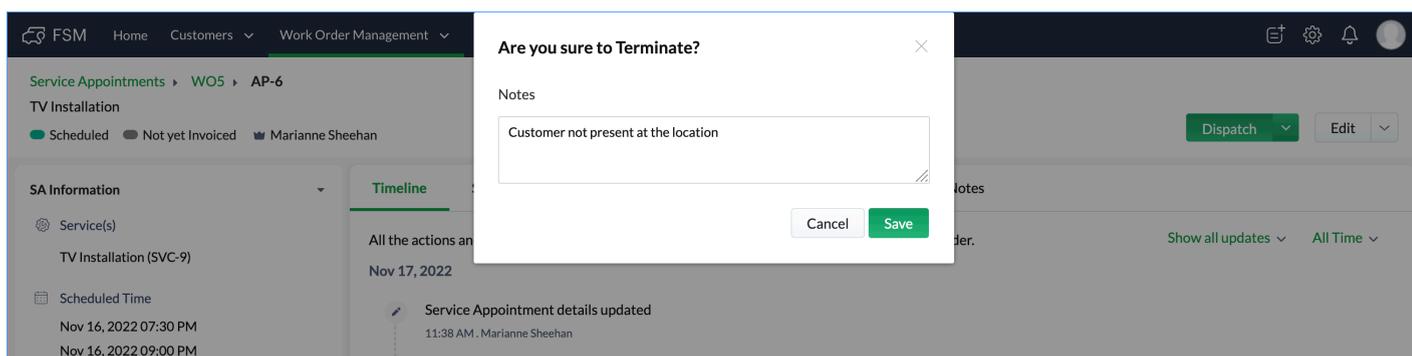
To terminate a service appointment:

1. Select **Service Appointments** from the **Work Order Management** menu.
2. Click the service appointment you want to terminate. In the *Service Appointment details* page, click **Terminate**.

The Terminate option will be available till the service appointment is completed.



3. Click **Save** in the confirmation message.



Appointment Usage Calculation

The appointment usage of a service appointment refers to the number of appointments that will be deducted from your total available appointments for it. This usage is calculated based on the time sheets of the service appointment. Specifically, the number of appointments deducted will correspond to the number of distinct dates in the time sheets created. Refer to the example below to understand this better:

Example

Time sheet	Start Date/Time	End Date/Time	Number of Distinct Dates	Number of Appointments Deducted
TS2	Jul 01, 2024 01:06 PM	Jul 01, 2024 02:45 PM	1	1
TS3	Jul 24, 2024 09:00 AM	Jul 25, 2024 03:03 PM	2	2
Total Appointments Deducted				3

The Zoho FSM [Org timezone](#) will be considered for the calculations. The details of the appointment usage can be seen in the left panel of a service appointment.

The screenshot displays the Zoho FSM interface for a service appointment. The left sidebar contains several sections: 'Address Details' (Territory: Zylker, Service Address), 'Appointment Deduction Details' (Appointment Deducted: 3), and 'Owner' (Marianne Sheehan). The main area shows the 'Time sheets' tab, which includes a table of time sheets. The table has columns for ID, Service Resource, Description, Start Date/Time, End Date/Time, Duration, and Service & Task ID. Two time sheets are listed: TS3 (Jul 24, 2024 09:00 AM to Jul 25, 2024 03:03 PM, 30 Hr(s) 3 Min(s) 27 secs) and TS2 (Jul 01, 2024 01:06 PM to Jul 01, 2024 02:45 PM, 1 Hr(s) 39 Min(s)).

ID	Service Resource	Description	Start Date/Time	End Date/Time	Duration	Service & Task ID
TS3	Marianne Sheehan		Jul 24, 2024 09:00 AM	Jul 25, 2024 03:03 PM	30 Hr(s) 3 Min(s) 27 secs	SVC-49
TS2	Marianne Sheehan		Jul 01, 2024 01:06 PM	Jul 01, 2024 02:45 PM	1 Hr(s) 39 Min(s)	SVC-49

When you have used up all your appointments, then you will encounter errors while creating service appointments or time sheets.

Limit Reached!
Closing the timesheet exceeds your Appointment limit.
Service Appointments: - 60/Month
Appointment Credits: - 6/month
Upgrade to continue.

[Help ?](#)

Points to remember

- When you create a service appointment, one appointment is automatically deducted. Later, when the total number of appointments to be deducted is calculated using the time sheets, this total includes the initial appointment deducted earlier.
- After appointments have been deducted, modifying the time sheets of the service appointment to reduce the number of distinct dates will not decrease the number of appointments already deducted.