



# Service Reports

A service report can be created for an appointment. It will capture the details of the service appointment, the associated contact details, and other inputs of customer acknowledgment such as signature, and rating.



Available in Editions: **All Editions**

## Create Service Report

- ❗ - **Permission Required:** [Service Reports](#)
- Find out the Edition-specific limits for [Service Report](#).

There are two ways in which you can create a service report:

1. Select **Service Appointments** from the **Work Order Management** menu. Select the service appointment that you want to create the service report for. Select the **Service report** tab and click **Create Service Report**.  
Or  
Select **Service Reports** from the **Work Order Management** menu and click **Create**. From the **Create Service Report** popup, select the service appointment that you want to create the service report for and click **Proceed**.
2. In the *Create Service Report* wizard, do the following:
  - a. In the Template dropdown, choose the [PDF template](#) you want to use and click Next under Model Preview.  
Under **Model Preview**, you can view all the details that will be included in the report. The service report will have the company logo if one is included in the [Organization Profile](#).

Create Service Report

Model Preview

Technician Feedback

Customer Feedback

Template

Standard



Zylker Inc.

39 Inner Rd, Fort Irwin, California, 92310

www.zylker.com

Service Report

Contact Details

Company

:

Zylker Inc.

Contact

:

Lucy Robins

Service Address

:

Service Address

200 N Vine St

Urbana

Illinois

61802

United States

Request Details

Problem Statement

:

Service Details

Service Summary

:

Cancel

Next

- b. Under **Technician Feedback**, enter the **Problem Statement**, the **Service Summary**, **Technician Name**, and **Technician Signature**, and click **Save & Next** to proceed.  
Click **Skip & Next** if you want to proceed to the next step without providing information under Technician Feedback.

Create Service Report

Model Preview

Technician Feedback

Customer Feedback

Technician Feedback

Problem Statement

Home painting

Service Summary

Painting the exterior walls

Technician Signature



Name:Atticus Pund

Attachments

Choose the image to attach

Note : You can upload up to 5 attachments, but the total size of all attachments must not exceed 10 MB.

< Back

Cancel

Skip & Next

Save & Next

The **Problem Statement** provided here will be added under the **Request Details** section of the service report. The **Service Summary** provided here will be added under the **Service Details** section of the service report. The user creating the service report can add a signature in the **Technician Signature** field. Click **Add Signature** to either draw the signature or upload it as a file. Click on  to edit the **Technician Name**. It will be pre-populated with the name of the user who is creating the service report. The **Technician Name** and the **Technician Signature** will be used to populate the **Technician Signature** details at the bottom of the generated service report.

- c. Under **Customer Feedback**, enter the **Customer Feedback**, **Customer Rating**, and **Customer Signature** and click **Save & Create** to proceed. The signature can either be drawn or uploaded as a file. Click on  to edit the **Customer Name**. It will be pre-populated with the name of the contact or company (if present). Click on the field to see the other names that you can choose from. Click **Skip & Create** if you want to create the service report without providing information under Customer Feedback.

The **Customer Feedback**, and **Customer Rating**, provided here, will be added under the **Customer Review** section of the service report. The **Customer Name** and the **Customer Signature** will be used to populate the **Customer Signature** details at the bottom of the generated service report.

You can find a sample service report [here](#).

 **Note:**

- Refer to the [pricing.page](#) for details regarding the number of service reports you can create.
- You can use [PDF Templates](#) to customize the service report.

You can perform the following actions on a service report:

- [Edit](#) the report
- [Clone](#) the report
- [Add/Edit Customer Feedback](#)
- [Add/Edit Technician Feedback](#)
- Download the report

Hover over the service report you want to make changes to. Click [  ] to edit the report. The other options will be available under the **more options** icon [  ]. You can also find these options in the *List* view of the **Service Reports** module under the **Work Order Management** menu.

FSM

Home

Customers

Work Order Management

Dispatch Console

Services And Parts

Assets

Workforce

Service Appointments

WO73

AP-33

Home painting

Completed

Not yet Invoiced

Atticus Pund

Reschedule

Edit

SA Information

Service(s)

Painting (SVC-250)

Scheduled Time

Mar 28, 2023 02:35 PM (GMT -08:00)

Mar 28, 2023 03:35 PM (GMT -08:00)

Actual Time

Mar 28, 2023 10:00 AM (GMT -08:00)

Mar 28, 2023 10:44 AM (GMT -08:00)

Assigned Resources

Atticus Pund (Lead)

Other Details

Company

Zylker Inc.

Contact

Lucy Robins

Asset

--

Timeline

Service and parts

Time sheets

Service report

Trips

Notes

Service Report

View and manage the service reports generated by the technicians.

Create Service Report

| Name   | Status | Summary                     | Created By    | Created Time                       |                                                                                                                    |
|--------|--------|-----------------------------|---------------|------------------------------------|--------------------------------------------------------------------------------------------------------------------|
| REP-57 | Draft  | Painting the exterior walls | Susan Ryeland | Mar 28, 2023 09:43 PM (GMT -08:00) | <div>Clone</div> <div>Add/Edit Customer Feedback</div> <div>Add/Edit Technician Feedback</div> <div>Download</div> |
| REP-58 | Draft  | -                           | Susan Ryeland | Mar 28, 2023 10                    |                                                                                                                    |
| REP-59 | Draft  | -                           | Susan Ryeland | Mar 28, 2023 10                    |                                                                                                                    |

 **Note:** The **Edit** option will be available only if the status of the service report is **Draft**.

You can also find these options within the service report.

Service Report - REP-9

Draft

Zylker Inc.  
39 Inner Rd, Fort Irwin, California, 92310  
www.zylker.com

Edit

Clone

Download

Add/Edit Customer Feedback

Add/Edit Technician Feedback

Print

Service Report REP-9

Contact Details

Company

:

Zylker Inc.

Contact

:

Lucy Robins

Service Address

:

Service Address

200 N Vine St

Urbana

Illinois

61802

United States

Request Details

Problem Statement

:

Home painting

Service Details

Service Summary

:

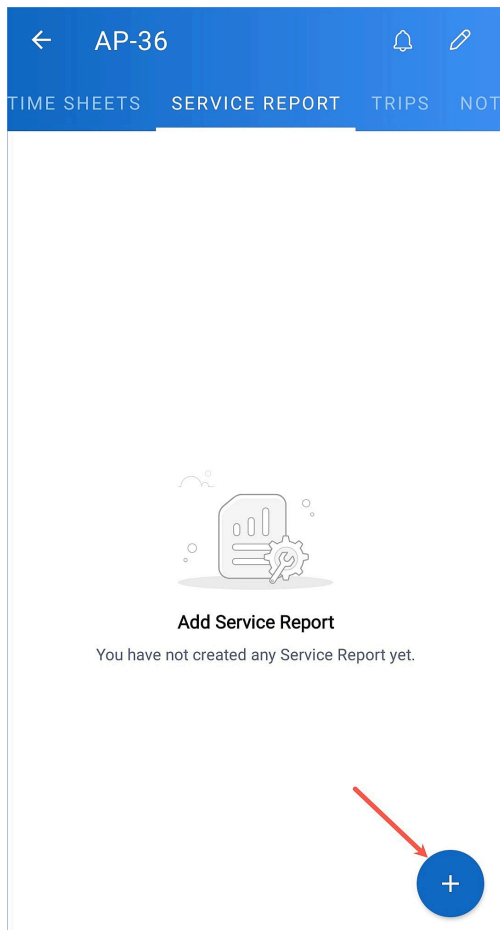
Painting the exterior walls

Asset Details

Send

To create a service report from the mobile app:

1. Log in to Zoho FSM mobile app.
2. From the *Home* screen or the *All Service Appointments List View* screen, select the appointment you want to create the service report for.
3. Select the **Service Report** tab and click the add [+] icon.



4. In the *Create Service Report* wizard, do the following:

- a. Choose the **PDF template** you want to use from the dropdown at the top and click **Next** under **Model Preview**.

Under **Model Preview**, you can view all the details included in the report.

←

Create Service Report

Model Preview

Standard ▾

Zyker Inc.

39 Inner Rd, Fort Irwin,  
California, 92310

www.zyker.com

Service Report

Contact Details

Company : Zyker Inc.

Contact : Lucy Robins

Service Address : Service Address  
200 N Vine St  
Urbana  
Illinois  
61802  
United States

Request Details

Problem Statement :

Service Details

Service Summary :

Asset Details

Asset Name :

Asset Number :

Service & Part

|                        | Quantity | List Price | Line Item Amount |
|------------------------|----------|------------|------------------|
| Exterior Wall Painting | 1.0      | \$ 20.00   | \$ 21.00         |
|                        |          | Sub Total  | \$ 20.00         |
|                        |          | Discount   |                  |
|                        |          | Adjustment |                  |
|                        |          | Total      | \$ 21.00         |

Work Order Details

WorkOrder Name : WO3

Customer Review

Customer Rating : ☆☆☆☆

Customer Feedback :

Next

- b. Enter the **Problem Statement**, the **Service Summary**, the **Technician Name**, and the **Technician Signature**, and click **Next** to proceed.

Click **Skip** if you want to proceed to the next step without providing information under Technician Feedback.



The screenshot shows the 'Create Service Report' form with the 'Technician Feedback' section active. The form has a blue header with a back arrow and the title 'Create Service Report'. Below the header, there are three circular icons representing different stages: a document with a checkmark, a person with a wrench, and a speech bubble. The 'Technician Feedback' section contains a table with three rows: 'Problem Statement' (with a red asterisk) containing 'Home painting', 'Service Summary' containing 'Painting the exterior walls', and 'Technician Signature' containing 'Name : Atticus Pund' and an 'Add' button. Below the table is an 'Attachments' section with a text input 'Choose the Image to attach' and a right arrow. A note below the attachments states: 'Note: You can upload up to 5 attachments, but the total size of all the attachments must not exceed 10MB.' At the bottom of the form are two buttons: 'Skip' and 'Next'.

| Technician Feedback  |                                         |
|----------------------|-----------------------------------------|
| * Problem Statement  | Home painting                           |
| Service Summary      | Painting the exterior walls             |
| Technician Signature | Name : Atticus Pund <a href="#">Add</a> |

Attachments: Choose the Image to attach >

Note: You can upload up to 5 attachments, but the total size of all the attachments must not exceed 10MB.

[Skip](#) [Next](#)

The **Problem Statement** provided here will be added under the **Request Details** section of the service report. The **Service Summary** provided here will be added under the **Service Details** section of the service report. In the **Technician Signature** field, click **Add** to include a signature. Click on  to edit the **Technician Name**. It will be pre-populated with the name of the user who is creating the service report. The **Technician Name** and the **Technician Signature** will be used to populate the **Technician Signature** details at the bottom of the generated service report.

- c. Enter the **Customer Feedback**, **Customer Rating**, **Customer Name**, and **Customer Signature**, and click **Save & Create** to proceed.

Click **Skip** if you want to create the service report without providing information under Customer Feedback.

The **Customer Feedback**, and **Customer Rating**, provided here, will be added under the **Customer Review** section of the service report. In the **Customer Signature** field, click **Add** to include a signature. Click on  to edit the **Customer Name**. It will be pre-populated with the name of the contact or company (if present). The **Customer Name** and the **Customer Signature** will be used to populate the **Customer Signature** details at the bottom of the generated service report.

To go back to a previous step, click on the respective icon in the wizard.

The created report can be viewed later from the *Service Report* card in the *Overview* screen or under the **Service Report** tab.

**REP-10 - Draft**  
Created By  
Atticus Pund  
Home painting

**Preview**

**More Options:**  
 Mark As Sent  
 Edit  
 Download  
 Share  
 Add/Edit Technician Feedback

**Draft**

**Service Report REP-10**

**Contact Details**  
 Company : Zylker Inc.  
 Contact : Lucy Robins  
 Service Address : Service Address  
 200 N Vine St  
 Urbana  
 Illinois  
 61802  
 United States

**Request Details**  
 Problem : Home painting  
 Statement

**Service Details**  
 Service Summary : Painting the exterior walls

**Asset Details**  
 Asset Name :  
 Asset Number :

| Service & Part         | Quantity | List Price | Line Item Amount |
|------------------------|----------|------------|------------------|
| Exterior Wall Painting | 1.0      | \$ 20.00   | \$ 21.00         |
| Sub Total              |          |            | \$ 20.00         |
| Discount               |          |            |                  |
| Adjustment             |          |            |                  |
| Total                  |          |            | \$ 21.00         |

**Work Order Details**  
 WorkOrder Name : WO3

**Customer Review**  
 Customer Rating : ★★★★★  
 Customer Feedback : Good work !!!

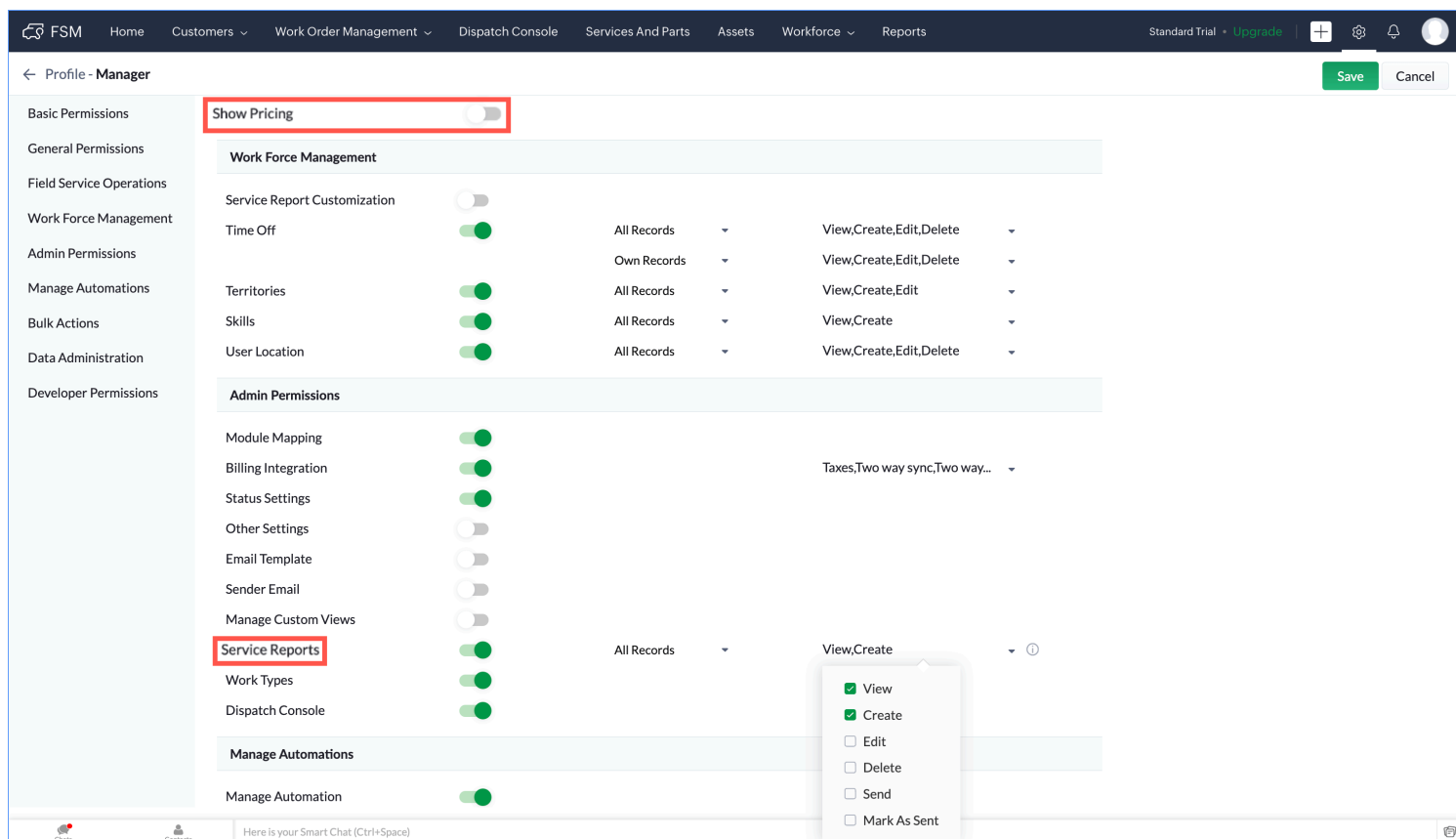
**Trips Section**

Click the **more options** [ ⋮ ] icon in the top-right corner of the service report for [Edit](#), **Download**, **Share**, and [Add/Edit Technician Feedback](#) options. The [Add/Edit Customer Feedback](#) option will be available if you haven't added the customer signature. You can download the service report as a PDF. You can also share the service report externally.

**Note:** You can upload a signature file with size upto 200KB in the format .jpg,.png, or .jpeg.

## Hide Pricing

You can restrict users from creating a service report with the pricing information of the services and parts. To achieve this, create a custom profile with the Create, and View action of the [Service Reports](#) permission enabled but with the [Show Pricing](#) permission disabled.



Also, depending on which action (Edit, Delete, Send, or Mark As Sent) you enable in the [Service Reports](#) permission, users can perform those actions on service reports that do not include the pricing information.

By default, users with the **Limited Field Agent** profile will have the Show Pricing permission disabled with View, Create, Send, and Mark As Sent actions for the [Service Reports](#) permission enabled for their Own Records. Thus the following will be true for the Limited Field Agent profile:

- They can View, Send, and Mark As Sent service reports that do not include the pricing information.
- They can Create service reports without the pricing information.

The following screenshot shows a service report that has been created without the pricing information:

Service Report - REP-10

Edit

Clone

Download

Asset Info

No records found

Service & Parts

| ID    | Name         | Quantity |
|-------|--------------|----------|
| SVC-2 | Snow Plowing | 1 Hours  |

Working Hours

No records found

Customer Review

No records found

Done By :-  
Scotty Valens

Send

**Note:** You can also use the [Show Pricing](#) option while customizing the service report template to create service reports without the pricing information of the services and parts.

## Add Attachments

You can add images (.png, .jpg, .jpeg) as attachments. You can upload a maximum of five images, but the combined size of all images must not exceed 10 MB.

FSM

Home

Customers

Work Order Management

Dispatch Console

Services And Parts

Assets

Workforce

Setup - Service Report

CancelSave

Page Layout

Customize the layout by selecting the desired sections and rearranging them through drag and drop.

Contact Details

Request Details

Service Details

Asset Details

Services & Parts

Show Pricing

Working Hours

Customer Review

Attachments

Trips

Reset

Choose Service Appointment to previewSample data

Service ReportZylkerSample Address

Contact Details

Account Name : Account 000

Customer Name : Contact 000

Service Address : Dreen City Conference Hall, Iowa City,IOWA,35223, United States of America.

Request Details

Problem Statement : Sample request

Service Details

Service Summary : Sample Technician summary

Service Duration : 2:00Hrs

Technicians Involved : Field Technician 000

Asset Details

Asset Name : Asset 000

While creating or editing a service report, you can add attachments during the **Technician Feedback** step. You can add attachments to a service report in two different ways:

- add attachments from existing notes
- create new notes with attachments and add those attachments

To add attachments to a service report:

1. In the **Technician Feedback** step, click the **Attachments** dropdown.

Create Service Report

Model Preview

Technician Feedback

Customer Feedback

Technician Feedback

Problem Statement

Home Painting

Service Summary

Painting the exterior walls

Technician Name

Alicia Florrick

Technician Signature



Attach File

Clear

Attachments

Choose the image to attach

Note : You can upload up to 5 attachments, but the total size of all attachments must not exceed 10 MB.

< Back

Cancel

Skip & Next

Save & Next

### To add attachments from existing notes

Click + on the attachment you want to include in the service report. The list of existing notes with attachments will be listed in the dropdown. The notes will be listed based on your [permission](#).

# Create Service Report

Model Preview

Technician Feedback

Customer Feedback

## Technician Feedback

Problem Statement

Home Painting

Service Summary

Painting the exterior walls

Technician Name

Alicia Florrick

Technician Signature

Waterproofing also done additionally

Created By Alicia Florrick

Created Time Apr 09, 2024 03:29 PM

exterior-wall-1.jpeg

+ Create New

Attachments

Choose the image to attach

Note : You can upload up to 5 attachments, but the total size of all attachments must not exceed 10 MB.

< Back

Cancel

Skip & Next

Save & Next

To add attachments from newly created notes  
Click **Create New**.



Create Service Report

Model Preview

Technician Feedback

Customer Feedback

Technician Feedback

Problem Statement

Home Painting

Service Summary

Painting the exterior walls

Technician Name

Alicia Florrick

Technician Signature

Waterproofing also done additionally

Created By

Alicia Florrick

Created Time

Apr 09, 2024 03:29 PM




+ Create New

Attachments

Choose the image to attach

Note : You can upload up to 5 attachments, but the total size of all attachments must not exceed 10 MB.

< Back

Cancel

Skip & Next

Save & Next

Click **Attach File** to add attachments. Add notes, and click **Save**.

Add Notes

Paint color changed as per customer's request

Attachments



exterior-wall-pain...

( 146.2 KB )

×

Attach File

+ Add Title

Cancel

Save

Click + on the attachment you want to include in the service report.  
The note will be added under the **Notes** section of the service appointment.

<https://help.zoho.com/portal/en/kb/fsm/work-order-management/articles/service-report>

Create Service Report

Model Preview

Technician Feedback

Customer Feedback

Technician Feedback

Problem Statement

Home Painting

Service Summary

Painting the exterior walls

Technician Name

Paint color changed as per customer's request

Created By

Alicia Florrick

Created Time

Apr 09, 2024 03:34 PM

Technician Signature

exterior-wall-...

Waterproofing also done additionally

Created By

Alicia Florrick

Created Time

Apr 09, 2024 03:29 PM

+ Create New

Attachments

Choose the image to attach

Note : You can upload up to 5 attachments, but the total size of all attachments must not exceed 10 MB.

< Back

Cancel

Skip & Next

Save & Next

## 2. Choose a **Compression Ratio**.

Compression ratio is the ratio of the size of the compressed image to the size of the image used. It is a measure of how much the image has been reduced in size through compression. The higher the compression ratio, the lower the size. You can choose one of the following compression ratios:

- **High:** 1/5
- **Medium:** 2/5
- **Low:** 3/5

<https://help.zoho.com/portal/en/kb/fsm/work-order-management/articles/service-report>

Create Service Report

Model Preview

Technician Feedback

Customer Feedback

Problem Statement

Home Painting

Service Summary

Painting the exterior walls

Technician Name

Alicia Florrick

Technician Signature



Attach File

Clear

Attachments



Compression Ratio - Medium

Note : You can upload up to 5 attachments, but the total size of all attachments must not exceed 10 MB.

< Back

Cancel

Skip & Next

Save & Next

Click on the pop-out [  ] icon to open the **Attachments** window in an enlarged view.

Attachments

All Images have compressed by medium ratio

+ Add New



Compressed ratio Medium

Cancel

Save

**Note:** It is important to remember that only the attachments in the notes can be included in the service report. You have the option to include attachments from existing notes or to create new notes with attachments while creating/editing the service report and adding them.

## Add Attachments from the Mobile App

Currently, you can add the attachments in existing notes to a service report. To do so:

1. In the *Create Service Report* screen, click on the **Attachments** field.

The screenshot shows the 'Edit Service Report' screen. At the top, there's a blue header with a back arrow and the title 'Edit Service Report'. Below the header, there are three circular icons representing different stages of the process, with 'Technician Feedback' highlighted. The main content area is titled 'Technician Feedback' and contains a form with the following fields:

- Problem Statement:** Home Painting
- Service Summary:** Painting the exterior walls
- Technician Name:** Alicia Florrick
- Technician Signature:** A handwritten signature.

Below the signature field, there is an 'Attachments' field with a red border. It contains the text 'Choose the Image to attach' and a right arrow. At the bottom of the screen, there are two buttons: 'Skip' and 'Next'.

2. Select the note attachment that you want to include and click **Add**.

←

Add attachment

Paint color changed as per customer's request

Created By

Alicia Florrick

Created Time

Apr 09, 2024 03:34 PM

exterior-...

Waterproofing also done additionally

Created By

Alicia Florrick

Created Time

Apr 09, 2024 03:29 PM

exterior-w  
all-1.jpeg

Size: 44.85 KB

exterior-...

+ Add

The Selected Images will be displayed on top. Click **Save**.

<https://help.zoho.com/portal/en/kb/fsm/work-order-management/articles/service-report>

←

Add attachment

Save

Selected Images



exterior...



Paint color changed as per customer's request

Created By

Alicia Florrick

Created Time

Apr 09, 2024 03:34 PM



exterior...



Waterproofing also done additionally

Created By

Alicia Florrick

Created Time

Apr 09, 2024 03:29 PM



exterior...



exterior...

+

3. Choose a **Compression Ratio** and click **Next**.

←

Edit Service Report





Technician Feedback

Technician Name

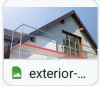
Alicia Florrick

Technician Signature






Attachments



exterior...

>

Compressed Ratio

Medium



Note : You can upload up to 5 attachments, but the total size of all attachments must not exceed 10MB.

Skip

Next

## Technician Feedback Section

You can customize the Technician Feedback section of the service report. To do so:

1. Navigate to **Setup > Customization > Modules and Fields** and click **Service Reports**.
2. Select the **Technician Feedback** layout and add the necessary fields/customizations and click **Save**.

The screenshot shows the Zoho FSM 'Service Reports' customization page. The top navigation bar includes 'FSM', 'Home', 'Customers', 'Work Order Management', 'Dispatch Console', 'Billing', 'Services And Parts', 'Workforce', and 'Professional Trial'. The 'Service Reports' section is active, with a 'Layout' dropdown set to 'Technician...'. A 'Cancel' button and a green 'Save' button are in the top right. A red circle highlights the 'Technician Feedback' layout name in the dropdown menu. Below the layout name, a message states: 'This page. Click 'Save' to save these changes.' The main area is divided into 'New Fields' and 'Unused Fields' tabs. The 'New Fields' tab is active, showing a list of fields: 'Single Line', 'Multi Line', '123 Number', '9-9 Long Integer', '.00 Decimal', 'Phone', 'Email', 'Date', 'Date Time', 'Checkbox', and a 'Drop here to delete' button. The 'Fields' section shows a list of fields for the 'Technician Feedback' layout: 'Problem Statement \*' (Multi Line), 'Service Summary' (Multi Line), 'Technician Signature' (Signature), and 'Follow Up Required?' (Checkbox). The 'Field Properties' panel on the right shows the 'Field label' as 'Follow Up Required?' and the 'Data Privacy' section with a checkbox for 'Contains personal data(PII)'.

Refer to [this](#) page for details on how to customize a module.

## Customer Feedback Section

You can customize the Customer Review section of the service report. To do so:

1. Navigate to **Setup > Customization > Modules and Fields** and click **Service Reports**.
  2. Select the **Customer Feedback** layout and add the necessary fields/customizations and click **Save**.
- If you do not want the Customer Feedback section to be displayed while creating or editing a service report, you can disable the toggle button.

Refer to [this](#) page for details on how to customize a module.

## Edit Service Report

You can edit the service report only if its status is **Draft**.

To edit a service report:

1. Hover over the service report and click the **Edit** [  ] icon.



Service Appointments > WO73 > AP-35  
Home painting

Completed Not yet Invoiced Atticus Pund

Reschedule Edit < >

**SA Information**

- Service(s)  
Painting (SVC-299)
- Scheduled Time  
Mar 29, 2023 04:30 PM (GMT -08:00)  
Mar 29, 2023 05:30 PM (GMT -08:00)
- Actual Time  
Mar 29, 2023 01:30 AM (GMT -08:00)  
Mar 29, 2023 02:00 AM (GMT -08:00)
- Assigned Resources  
Atticus Pund (Lead)

**Other Details**

- Company Zylker Inc.
- Contact Lucy Robins
- Asset --

**Service Report**

View and manage the service reports generated by the technicians.

Create Service Report

| Name   | Status | Summary                     | Created By    | Created Time                       |
|--------|--------|-----------------------------|---------------|------------------------------------|
| REP-64 | Draft  | Painting the exterior walls | Susan Ryeland | Mar 29, 2023 03:24 AM (GMT -08:00) |

2. Make the necessary edits using the *Edit Service Report* wizard and save the changes.

When you try to edit a service report that includes a customer signature, then you will have to provide a reason for making the changes (refer to the screenshot below). Once you edit the service report, the customer signature will be removed. If you want to retain the customer signature even after editing the service report, disable the transaction setting [Remove Customer Signature](#).

### Edit Service Report?

Share the reason why did you want edit

Customer has requested some changes.

**Things to know after edit the service report,**

- Customer Signature will be removed

Cancel Save & Continue

To edit a service report from the mobile app:

1. Log in to Zoho FSM mobile app.

2. From the *Home* screen or the *All Service Appointments List View* screen, select the appointment whose service report you want to edit.
3. Select the **Service Report** tab and click the service report you want to edit.
4. Click the **more options** [ ⋮ ] icon in the top-right corner of the service report and select **Edit**.

REP-67 - Draft  
Created By Susan Ryeland  
Home painting

Mark As Sent  
**Edit**  
Download  
Share  
Add/Edit Technician Feedback

**Preview**

Draft

**Service Report**

Irwin, California, United States, 92310, U.S.A.  
www.endeavour.com

**Contact Details**

Account Name : Zylker Inc.  
Customer Name : Lucy Robins  
Service Address : Service Address, 200 N Vine St., Urbana, Illinois, 61802, United States.

**Request Details**

Problem Statement : Home painting

**Service Details**

Service Summary : Cleaning the walls  
Service Duration : 30 Min  
Technicians Involved : Atticus Pund.

**Asset Info**

No records found

**Working Hours**

| Date        | Hours Spent |
|-------------|-------------|
| Mar 29 2023 | 00 : 30     |

**Customer Review**

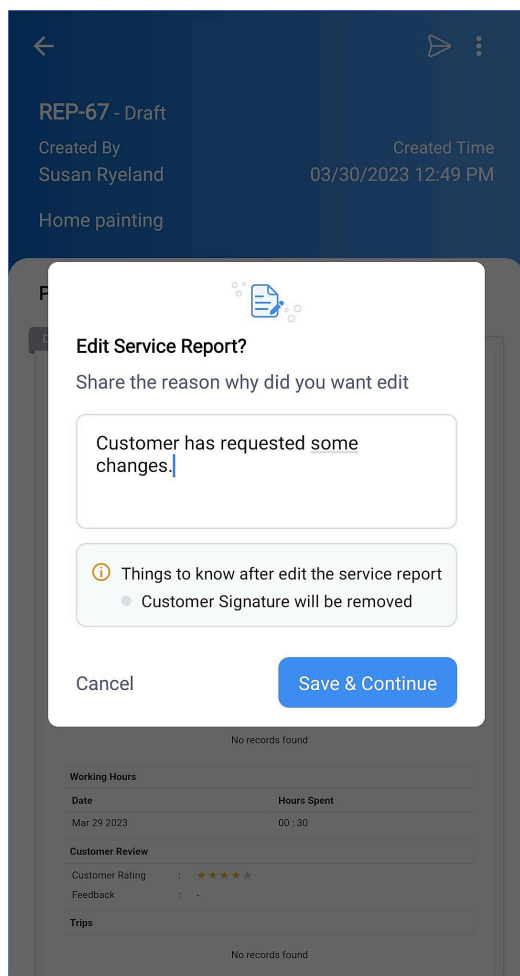
Customer Rating : ★★★★★  
Feedback : -

**Trips**

No records found

5. Make the necessary edits using the *Edit Service Report* wizard and save the changes.

When you try to edit a service report that includes a signature, then you will have to provide a reason for making the changes (refer to the screenshot below).



## Adding And Editing Customer Feedback

If you hadn't captured the customer feedback while creating the service report, then you can add it later using the *Add/Edit Customer Feedback* option.

To add or edit the customer feedback in a service report:

1. Hover over the service report and select **Add/Edit Customer Feedback** from the **more options** icon [⋮]. You will not be allowed to proceed if the customer signature has been added or if the status of the service report is Sent.

Service Appointments > WO73 > AP-35

Home painting

Completed Not yet Invoiced Atticus Pund

Reschedule Edit < >

SA Information

Service(s)

Painting (SVC-299)

Scheduled Time

Mar 29, 2023 04:30 PM (GMT -08:00)

Mar 29, 2023 05:30 PM (GMT -08:00)

Actual Time

Mar 29, 2023 01:30 AM (GMT -08:00)

Mar 29, 2023 02:00 AM (GMT -08:00)

Assigned Resources

Atticus Pund (Lead)

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

**Service Report**

Create Service Report

View and manage the service reports generated by the technicians.

| Name   | Status | Summary                     | Created By    | Created Time                       |
|--------|--------|-----------------------------|---------------|------------------------------------|
| REP-64 | Draft  | Painting the exterior walls | Susan Ryeland | Mar 29, 2023 03:24 AM (GMT -08:00) |

Clone

**Add/Edit Customer Feedback**

Add/Edit Technician Feedback

Download

2. Make the necessary edits and save the changes.

To add or edit the customer feedback in a service report from the mobile app:

1. Log in to Zoho FSM mobile app.
2. From the *Home* screen or the *All Service Appointments List View* screen, select the appointment whose customer feedback you want to add or edit.
3. Select the **Service Report** tab and click the service report to which you want to add or edit the customer feedback.
4. Click the **more options** [ ⋮ ] icon in the top-right corner of the service report and select **Add/Edit Customer Feedback**.

This option will be available only if the customer signature hasn't been added or if the status of the service report is Draft.

REP-69 - Preview

Service Report

Mark As Sent

Contact Details

Account Name :  
Customer Name :  
Service Address :

Request Details

Problem Statement : Share

Service Details

Service Summary :  
Service Duration :  
Technicians Involved :

Asset Info

Add/Edit Customer Feedback

Add/Edit Technician Feedback

Working Hours

| Date        | Hours Spent |
|-------------|-------------|
| Mar 29 2023 | 00 : 30     |

Customer Review

Customer Rating : ★ ★ ★ ★ ★  
Feedback : Good job !!!

Trips

No records found

Service & Parts

| ID      | Name     | Price(\$) | Quantity | Total(\$) |
|---------|----------|-----------|----------|-----------|
| SVC-299 | Painting | 1 Hours   | 1        | 21.1      |

Sub Total \$ 20  
Tax Amount \$ 1  
Discount \$ 0  
Adjustment \$ 0  
Grand Total \$ 21

Done By :-  
Susan Ryeland

5. Make the necessary edits and save the changes.

## Adding And Editing Technician Feedback

If you hadn't captured the technician feedback while creating the service report, then you can add it later.

To add or edit the technician feedback in a service report:

1. Hover over the service report and select **Add/Edit Technician Feedback** from the **more options** icon [⋮].  
You will not be allowed to proceed if the status of the service report is Sent.

Service Appointments > WO73 > AP-35  
Home painting

Completed Not yet Invoiced Atticus Pund

Reschedule Edit < >

SA Information

- Service(s)  
Painting (SVC-299)
- Scheduled Time  
Mar 29, 2023 04:30 PM (GMT -08:00)  
Mar 29, 2023 05:30 PM (GMT -08:00)
- Actual Time  
Mar 29, 2023 01:30 AM (GMT -08:00)  
Mar 29, 2023 02:00 AM (GMT -08:00)
- Assigned Resources  
Atticus Pund (Lead)

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

**Service Report**  
View and manage the service reports generated by the technicians.

Create Service Report

| Name   | Status | Summary                     | Created By    | Created Time                       |
|--------|--------|-----------------------------|---------------|------------------------------------|
| REP-64 | Draft  | Painting the exterior walls | Susan Ryeland | Mar 29, 2023 03:24 AM (GMT -08:00) |

Clone  
Add/Edit Customer Feedback  
**Add/Edit Technician Feedback**  
Download

2. Make the necessary edits and save the changes.

To add or edit the technician feedback in a service report from the mobile app:

1. Log in to Zoho FSM mobile app.
2. From the *Home* screen or the *All Service Appointments List View* screen, select the appointment whose technician feedback you want to add or edit.
3. Select the **Service Report** tab and click the service report to which you want to add or edit the technician feedback.
4. Click the **more options** [ : ] icon in the top-right corner of the service report and select **Add/Edit Technician Feedback**.

This option will be available only if the status of the service report is Draft.

← REP-64 - Preview ➤ ⓘ

**Contact Details**

Account Name :  
Customer Name :  
Service Address :

**Request Details**

Problem Statement :

**Service Details**

Service Summary :  
Service Duration :  
Technicians Involved :

**Asset Info**

✉ Mark As Sent

✎ Edit

⬇ Download

🔗 Share

🗨 Add/Edit Technician Feedback

No records found

**Working Hours**

| Date        | Hours Spent |
|-------------|-------------|
| Mar 29 2023 | 00 : 30     |

**Customer Review**

Customer Rating : ★★★★★

Feedback : Happy with the service provided.

**Trips**

No records found

**Service & Parts**

| ID      | Name     | Price(\$) | Quantity | Total(\$) |
|---------|----------|-----------|----------|-----------|
| SVC-299 | Painting | 1 Hours   | 1        | 21.1      |

Sub Total \$ 20

Tax Amount \$ 1

Discount \$ 0

Adjustment \$ 0

Grand Total \$ 21

**Customer Signature**

  
Susan Ryeland  
Mar 30, 2023 03:16 AM

**Done By :-**  
Susan Ryeland

5. Make the necessary edits and save the changes.

## Send Service Report

You can email the service report. To send a service report:

1. Select **Service Appointments** from the **Work Order Management** menu. Select the service appointment whose service report you want to send. Select the **Service reports** tab, and click the service report you want to send.  
Or  
Select **Service Reports** from the **Work Order Management** menu and click the service report you want to send.
2. In the **Template** dropdown, choose the PDF template you want to use and click **Send**.  
Note that the status of the report will be **Draft**.

Service Report - REP-9

Edit Clone Download

Template

Standard

Draft



Zylker Inc.

39 Inner Rd, Fort Irwin, California, 92310

www.zylker.com

Service Report REP-9

Contact Details

Company : Zylker Inc.

Contact : Lucy Robins

Service Address : Service Address  
200 N Vine St  
Urbana  
Illinois  
61802  
United States

Request Details

Problem Statement : Home painting

Service Details

Service Summary : Painting the exterior walls

Asset Details

Send

### 3. Click **Send**.

By default, the checkbox for **Add Service Report PDF** will be selected. If you do not wish to include the service report PDF in the email, deselect it. To rename the service report PDF, click on its name and enter a new value. The [email templates](#) that you have created for the service report module will be listed in the **Template** dropdown, along with the default Standard template. When the email is sent, the placeholders in the email template will be replaced with actual values.

In the **From** field, choose a [sender email address](#).

In the **Send To** field, you can use the following email addresses:

- Contact email address (if only contact is present for the work order)
- Company email address (if a company is present for the estimate)
- Email addresses of the Company's Contacts (if a company is present for the work order)
- An email address entered by the user in the **Email** field of the work order

In the Cc and Bcc fields, along with the email addresses available in the **Send To** field, all active confirmed users will also be listed. To include any other email address, just type in the value and press **Enter**. In each of these fields, you can include a maximum of five email addresses.

<https://help.zoho.com/portal/en/kb/fsm/work-order-management/articles/service-report>



Send Service Report

From

To

lucy.robins@noemail.com

Bcc Cc

Subject

Service Report - REP-9 from Zylker Inc.

Template

Standard

Hello Team,

Thank you for your business. Here is your Service report for the Service appointment AP-2. The associated details are :

Summary : Home painting



Zylker Inc.

39 Inner Rd, Fort Irwin, California, 92310

www.zylker.com

Service Report

REP-9

Contact Details

|                 |                   |
|-----------------|-------------------|
| Company         | : Zylker Inc.     |
| Contact         | : Lucy Robins     |
| Service Address | : Service Address |

☒ Add Service Report PDF

REP-9 .pdf (Standard)

Cancel

Send

If there are no sender email addresses, then the service report will be sent from [noreply@notifications.zohofsm.com](mailto:noreply@notifications.zohofsm.com).

Send Service Report

From

noreply@notifications.zohofsm.com

To customize sender address, go to [Sender Email\(s\)](#).

To

lucy.robins@noemail.com

Bcc Cc

Subject

Service Report - REP-9 from Zylker Inc.

Template

Standard

Hello Team,

Thank you for your business. Here is your Service report for the Service appointment AP-2. The associated details are :

Summary : Home painting



Zylker Inc.

39 Inner Rd, Fort Irwin, California, 92310

www.zylker.com

Service Report

REP-9

Contact Details

|                 |                   |
|-----------------|-------------------|
| Company         | : Zylker Inc.     |
| Contact         | : Lucy Robins     |
| Service Address | : Service Address |

☒ Add Service Report PDF

REP-9 .pdf (Standard)

Cancel

Send

Once the report is sent, the status changes to **Sent** and you will have a **Resend Report** option.

Service Report - REP-9

CloneDownload

TemplateStandard

Sent



**Zylker Inc.**  
39 Inner Rd, Fort Irwin, California, 92310  
www.zylker.com

Service Report  
REP-9

Contact Details

|                 |                                                                                    |
|-----------------|------------------------------------------------------------------------------------|
| Company         | : Zylker Inc.                                                                      |
| Contact         | : Lucy Robins                                                                      |
| Service Address | : Service Address<br>200 N Vine St<br>Urbana<br>Illinois<br>61802<br>United States |

Request Details

|                   |                 |
|-------------------|-----------------|
| Problem Statement | : Home painting |
|-------------------|-----------------|

Service Details

|                 |                               |
|-----------------|-------------------------------|
| Service Summary | : Painting the exterior walls |
|-----------------|-------------------------------|

Asset Details

Resend Report

Before you send the report, if you want to change the status of the report to Sent, click **Mark as Sent**.

Service Report - REP-9

EditCloneDownload

Template

Standard

Draft



Zylker Inc.

39 Inner Rd, Fort Irwin, California, 92310

www.zylker.com

Service Report

REP-9

Contact Details

Company

:

Zylker Inc.

Contact

:

Lucy Robins

Service Address

:

Service Address

200 N Vine St

Urbana

Illinois

61802

United States

Request Details

Problem Statement

:

Home painting

Service Details

Service Summary

:

Painting the exterior walls

Asset Details

Mark As Sent

Send

To send a service report from the mobile app:

1. Log in to Zoho FSM mobile app.
2. From the *Home* screen or the *All Service Appointments List View* screen, select the appointment you want to create the service report for.
3. Select the **Service Report** tab and click the report you want to send.

| ← AP-2        |  | ✎                     | ⋮     |
|---------------|--|-----------------------|-------|
| TIME SHEETS   |  | SERVICE REPORTS       | TRIPS |
| REP-10        |  | Draft                 |       |
| Created By    |  | Created Time          |       |
| Atticus Pund  |  | Dec 16, 2024 03:40 PM |       |
| Home painting |  |                       |       |
| REP-9         |  | Sent                  |       |
| Created By    |  | Created Time          |       |
| Atticus Pund  |  | Dec 16, 2024 01:33 PM |       |
| Home painting |  |                       |       |



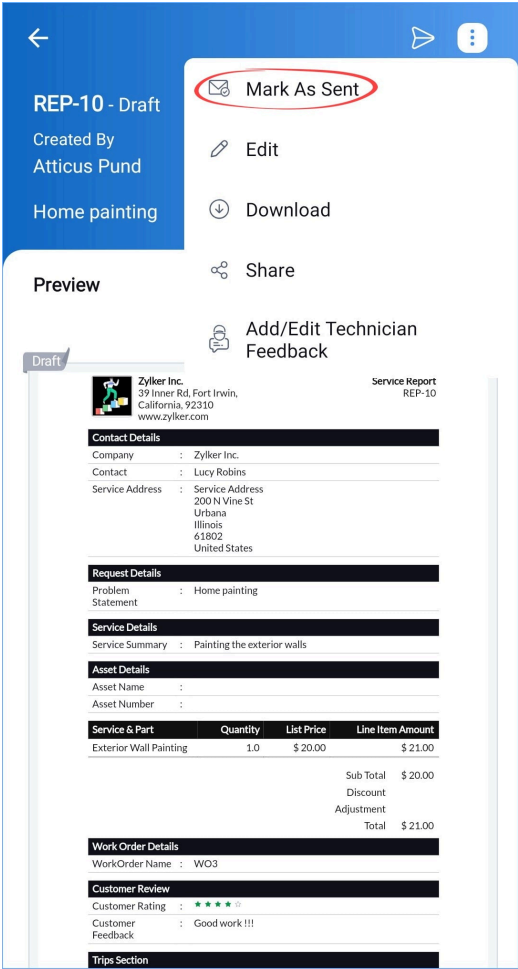
- Choose the [PDF template](#) you want to use from the dropdown at the top and click the **Send** [  ] icon. The status of the report will be **Draft**.





Once the report is sent, the status changes to **Sent**. Click the **Send** [  ] icon to send the report again.

You can change the status to Sent without sending the report by clicking on **Mark As Sent**.



## Clone Service Report

You can clone a service report. The cloned service report will include all the details of the original report including the customer signature.

To clone a service report:

1. Select **Service Appointments** from the **Work Order Management** menu.
2. Select the service appointment whose service report you want to clone.
3. Select the **Service report** tab. Hover over the service report you want to clone and select **Clone** from the **more options** icon [ ⋮ ].

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

Service Appointments WO73 AP-35  
Home painting  
Completed Not yet Invoiced Atticus Pund

Reschedule Edit < >

SA Information

Service(s)  
Painting (SVC-299)

Scheduled Time  
Mar 29, 2023 04:30 PM (GMT -08:00)  
Mar 29, 2023 05:30 PM (GMT -08:00)

Actual Time  
Mar 29, 2023 01:30 AM (GMT -08:00)  
Mar 29, 2023 02:00 AM (GMT -08:00)

Assigned Resources  
Atticus Pund (Lead)

Other Details

Company Zylker Inc.  
Contact Lucy Robins  
Asset --

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

**Service Report**  
View and manage the service reports generated by the technicians.

Create Service Report

| Name   | Status | Summary                                    | Created By    | Created Time                       |
|--------|--------|--------------------------------------------|---------------|------------------------------------|
| REP-69 | Draft  | -                                          | Susan Ryeland | Mar 30, 2023 01:38 AM (GMT -08:00) |
| REP-68 | Draft  | -                                          | Susan Ryeland | Mar 29, 2023 11:25 PM (GMT -08:00) |
| REP-67 | Draft  | Cleaning the walls                         | Susan Ryeland | Mar 29, 2023 11:19 PM (GMT -08:00) |
| REP-64 | Sent   | - Painting the exterior walls - Paintin... | Susan Ryeland | Mar 29, 2023 03:24 AM (GMT -08:00) |

Clone  
Add/Edit Customer Feedback  
Add/Edit Technician Feedback  
Download

4. In the *Clone Service Report* form, click **Save**.

### Clone Service Report

Model Preview Technician Feedback Add Signature

**Service Report**

 **Endeavour Pvt Ltd.**  
39 Inner Loop Rd, Fort Irwin, California, United States, 92310, U.S.A.  
www.endeavour.com

**Contact Details**

Account Name : Zylker Inc.  
Customer Name : Lucy Robins  
Service Address : Service Address, 200 N Vine St., Urbana, Illinois, 61802, United States.

**Request Details**

Problem Statement : Home painting

**Service Details**

Service Summary :  
- Painting the exterior walls  
- Painting the nursery

Cancel Next



The cloned service report will be listed under the **Service report** tab.

FSM

Home

Customers

Work Order Management

Dispatch Console

Services And Parts

Assets

Workforce

Service Appointments

WO73

AP-35

Home painting

Completed

Not yet Invoiced

Atticus Pund

Reschedule

Edit

<

>

SA Information

Service(s)

Painting (SVC-299)

Scheduled Time

Mar 29, 2023 04:30 PM (GMT -08:00)

Mar 29, 2023 05:30 PM (GMT -08:00)

Actual Time

Mar 29, 2023 01:30 AM (GMT -08:00)

Mar 29, 2023 02:00 AM (GMT -08:00)

Assigned Resources

Atticus Pund (Lead)

Other Details

Company

Zylker Inc.

Contact

Lucy Robins

Asset

--

Timeline

Service and parts

Time sheets

Service report

Trips

Notes

Service Report

View and manage the service reports generated by the technicians.

Create Service Report

| Name   | Status | Summary                                    | Created By    | Created Time                       |
|--------|--------|--------------------------------------------|---------------|------------------------------------|
| REP-69 | Draft  | -                                          | Susan Ryeland | Mar 30, 2023 01:38 AM (GMT -08:00) |
| REP-70 | Draft  | - Painting the exterior walls - Paintin... | Susan Ryeland | Mar 30, 2023 01:44 AM (GMT -08:00) |
| REP-68 | Draft  | -                                          | Susan Ryeland | Mar 29, 2023 11:25 PM (GMT -08:00) |
| REP-67 | Draft  | Cleaning the walls                         | Susan Ryeland | Mar 29, 2023 11:19 PM (GMT -08:00) |
| REP-64 | Sent   | - Painting the exterior walls - Paintin... | Susan Ryeland | Mar 29, 2023 03:24 AM (GMT -08:00) |

## Reports

In the report **Service Reports by Status**, you can see the list of all the service reports created along with their current status.

FSM

Home

Customers

Work Order Management

Dispatch Console

Services And Parts

Assets

Workforce

Reports

Service Reports by Status

Updated less than a minute ago

Export

totalrecords: 14

Filters

Created Time

Last 12 Months

May 01, 2022

Apr 30, 2023

Apply

Clear Filter

Show Details

| STATUS       | APPOINTMENT | SERVICE REPORT NAME | PROBLEM STATEMENT               | SERVICE SUMMARY | TOTAL (\$) |
|--------------|-------------|---------------------|---------------------------------|-----------------|------------|
| Draft ( 14 ) | AP-7 ( 1 )  | REP-1               | Remodeling of the Crawford H... | -               | 48.15      |
|              | AP-10 ( 2 ) | REP-4               | Remodeling of the Crawford H... | Home Painting   | 642.00     |
|              |             | REP-3               | Remodeling of the Crawford H... | Home painting   | 642.00     |
|              | AP-11 ( 1 ) | REP-2               | Remodeling of the Crawford H... | -               | 21.40      |
|              | AP-13 ( 2 ) | REP-6               | TV wall mounting                | TV Installation | 133.75     |
|              |             | REP-5               | TV wall mounting                | TV Installation | 133.75     |
|              | AP-14 ( 2 ) | REP-8               | TV wall mounting                | TV installation | 133.75     |
|              |             | REP-7               | TV wall mounting                | TV installation | 133.75     |
|              | AP-58 ( 2 ) | REP-10              | Remodeling of the Crawford H... | -               | 128.40     |
|              |             | REP-9               | Remodeling of the Crawford H... | -               | 128.40     |
|              | AP-59 ( 3 ) | REP-13              | Remodeling of the Crawford H... | -               | 144.45     |
|              |             | REP-12              | Home Painting                   | -               | 144.45     |
|              |             | REP-11              | Home Painting                   | -               | 144.45     |

## Sample Service Report

Given below is a sample service report.