



Service Tasks

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Service tasks are subtasks or child tasks that you can add to a [service](#). When you want to handle a service that is a composite task consisting of several activities, then creating service tasks for the service will come in handy. For example, consider remodelling a house as a service. This would involve several subtasks which in turn would comprise other tasks. In the case of remodelling a house, let's consider that the tasks involved are home painting, and flooring. The composite tasks of home painting would consist of subtasks such as cleaning and prepping walls, sand or repair surfaces, applying primer, and painting. Similarly, flooring would involve preparation, installation, and finishing. In this case, you can create services for home painting, and flooring and create service tasks for each of the subtasks.



Available in Editions: **Standard, Professional**

Features of a service task

- Service tasks help in capturing the different facets of a work request that is essential to completing it.
- Ability to breakdown a complex or composite task into multiple subtasks and create appointments for them. The subtasks can be assigned to multiple agents and its progress can be easily tracked.
- The work for a service task can be partially completed and can be resumed later. Partially completed tasks can be assigned to different appointments. Thus, a work can be started by one agent and then assigned to another agent. This would also enable agents to switch between tasks at different customer locations seamlessly.
- At anytime, you can delink a service task from an appointment but retain it in the parent work order.

In the subsequent sections, as you learn about the usage of service tasks, you will understand the context of the features mentioned here.

Using service tasks involve the following steps:

- Adding [service tasks](#) to the service
- Creating a [work order](#) with the service having the service tasks
- Creating [appointments](#) for the desired service tasks

Create Service Tasks

 Find out the Edition-specific limits for [Service Tasks](#).

Service tasks are added for a [service](#). Consider remodelling a house as the work request received. This work request comprises of two major tasks: home painting, and flooring. These two tasks can be added as services. The subtasks for each of these tasks can be added as the service tasks. In this section, home painting is added as the service with service tasks clean and prep wall, sand or repair surfaces, apply primer, and painting.

To create service tasks:

1. Select the **Services And Parts** module.
2. Click **Create** and select **Service** from the dropdown.
3. Enter the details of the [service](#).
4. Click **+New Line** for **Service Tasks**.
5. Enter a **Service Task Name**. If needed, add a **Description**, and **Duration** for the service task.
6. Click **Save**.

Create Service and Part Services ×

Unit Hours

Unit Price 20

Work Type Search Work Type ⊞

Tax Details

Taxable Taxable Non-Taxable

Service Tasks ←

Service Task Name	Description	Duration
<input type="text" value="Clean and prep wall"/>	<input type="text"/>	<input type="text" value="3 Hr"/> <input type="text" value="0 Min"/> ⊖
<input type="text" value="Sand or repair surfaces"/>	<input type="text"/>	<input type="text" value="3 Hr"/> <input type="text" value="0 Min"/> ⊖
<input type="text" value="Apply Primer"/>	<input type="text"/>	<input type="text" value="3 Hr"/> <input type="text" value="0 Min"/> ⊖
<input type="text" value="Painting"/>	<input type="text"/>	<input type="text" value="3 Hr"/> <input type="text" value="0 Min"/> ⊖

+ New Line ←

Cancel Save

You can also add the service tasks later by clicking the **+ Add Service Task** in the *Services And Parts Details* page or by editing the service.

Services And Parts > Home Painting

Service \$ 15 Hours William Turner

Work Type --

Taxable true

Tax Name --

Tax Exemption Code --

Record is not linked yet

Timeline Notes **Service tasks** Related list

Service Tasks are subtasks or steps that needs to be done by the field technician or crew in order to complete the service successfully.

Service Task Name	Description	Duration
Painting		3 Hr(s)
Apply primer		3 Hr(s)
Sand or repair surfaces		3 Hr(s)
Clean and prep wall		3 Hr(s)

+ Add Service Task

Use Service Tasks in a Work Order

Once services are created with the service tasks, you can use them in work orders. A work order for house remodelling can be created with the services home painting, and flooring.

Following are the steps to use a service task in a work order:

1. Select **Work Orders** from the **Work Order Management** menu and click **Save**.
2. In the *Create Work Order* overlay, enter the details of your [work order](#).
3. When you select a service, its associated service tasks will get added to the work order. You can remove the service tasks that you don't require. The duration for each service task, if provided during the service task creation, will be populated. This duration can be modified, if required. While creating a work order, you can add new service tasks to a service, but these won't get added to its parent service. You might want to add a subtask, waterproofing, for home painting which is specific only to this work order. Waterproofing will be available as a service task for home painting only in this work order.

Create Work Order



Service Tasks

Service Line Item	Service Task Name	Duration	
Home Painting	Clean and prep wall <input type="text" value="Add a Description"/>	6 Hr 0 Min	⊖
	Sand or repair surfaces <input type="text" value="Add a Description"/>	6 Hr 0 Min	⊖
	Apply primer <input type="text" value="Add a Description"/>	20 Hr 0 Min	⊖
	Painting <input type="text" value="Add a Description"/>	20 Hr 0 Min	⊖
	 Waterproofing <input type="text" value="Add a Description"/>	6 Hr 0 Min	⊖
			+ Add
Flooring	Preparation <input type="text" value="Add a Description"/>	5 Hr 0 Min	⊖
	Installation <input type="text" value="Add a Description"/>	5 Hr 0 Min	⊖
	Finishing <input type="text" value="Add a Description"/>	5 Hr 0 Min	⊖
			+ Add

Cancel

Save

In the **Service and parts** tab, you can view the appointment associated with a service. Click on  to view the associated appointments.

Work Order Details

- Requests --
- Estimates --
- Parent Work Order --
- Currency USD
- Exchange Rate 1

Company & Contact

No Company found

Bret Lee

Asset

Asset --

Address

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

Services

Service Line Item Name	Service	Quantity	List Price	Tax Name	Line Item Amount
SVC-13	Home Painting	1 Hours	\$ 20	SalesTax [7%]	\$ 21.4
SVC-16	Remodeling of the Crawford House	1 Hours	\$ 15	SalesTax [7%]	\$ 16.05

Parts

Part Line Item Name	Part	Quantity	List Price	Tax Name	Line Item Amount
PRT-8	External Wall Waterproofing Coat	1 Each	\$ 100	SalesTax [7%]	\$ 107
PRT-9	Ceramic Decorative Mosaic Tile	100	\$ 1	SalesTax [7%]	\$ 107

Use Service Tasks in a Service Appointment

You can create service appointments for one or more of the services or service tasks. You can create the appointments depending on how you plan to carry out the work. For example, you can create an appointment for the service Home Painting or create an appointment for the service tasks Clean and prep wall, and Sand or repair surfaces.

Following are the steps to use a service task in a service appointment:

1. Select **Work Orders** from the **Work Order Management** menu and click the work order you want to add the service appointment to.
2. Select the **Appointments** tab and click **Create Appointment**.
3. Enter the following details, then click **Schedule** or **Schedule and Dispatch**:
 - a. For **Service**, select services or service tasks.
All the unscheduled services and service tasks will be populated in this field. Click on the field to see the list of the services and service tasks. Retain the ones you want to be part of the appointment. Uncheck the rest.

Create Appointment

Service

Home Painting (SVC-1) ×

New, Quantity: 1

- Waterproofing (STL-5)
- Painting (STL-4)
- Apply primer (STL-3)
- Sand or repair surfaces (STL-2)
- Clean and prep wall (STL-1)

Flooring (SVC-2) ×

New, Quantity: 1

- Finishing (STL-8)
- Installation (STL-7)
- Preparation (STL-6)

Summary Filters Show All

Asset

- Home Painting(SVC-1) ▲
- New, Quantity: 1
- Waterproofing(STL-5)
- New
- Painting(STL-4)
- New

Scheduled Start Date Time (GMT -07

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

c. The values for **Scheduled Start Date Time** and **Scheduled End Date Time**.

The **Scheduled Start Date Time** and **Scheduled End Date Time** can be scheduled for different dates.

d. A **Field Agent** or a **Crew**

One or more resources can be assigned to the appointment.

Create Appointment
✕

Service

Home Painting (SVC-1) ✕

New, Quantity: 1

Sand or repair surfaces (STL-2)
Clean and prep wall (STL-1)

Summary

Remodeling of the Crawford House

Asset

Search Asset ☰

Due Date Oct 20, 2022

Scheduled Start Date Time

Sep 22, 2022	09:00 AM	(GMT -07.00)
--------------	----------	--------------

Scheduled End Date Time

Sep 23, 2022	06:00 PM	(GMT -07.00)
--------------	----------	--------------

Service Resource

Ross Smith ✕

Schedule and Dispatch

Cancel

Schedule ▼

Work on appointments

You can start work on an appointment in two different ways:

- Start work on one or more service line items
- Start work on individual service tasks

Start work on one or more service line items

You can start work on one or more service line items in a service appointment in the following ways:

- Start work on an appointment
- Start work for the service line item
- Create time sheet for the service line items

Start work on an appointment

You can start work for an appointment when you want to initiate the work for one or more of the service tasks or for all of them. For example, when multiple agents are available, the work on an appointment can be started even if it involves several tasks. The work for a service appointment that includes the service home painting can be started if you plan to simultaneously start work on all its service tasks.

1. Select the **Service Appointments** menu from the **Work Order Management** menu.
2. Select the service appointment you want to start work on.
3. Click **Start Work**.

The screenshot shows the FSM Work Order Management interface. The top navigation bar includes 'FSM', 'Customers', 'Work Order Management', 'Dispatch Console', 'Services And Parts', 'Assets', 'Workforce', and 'Reports'. The main content area displays a service appointment for 'Remodeling of the Crawford House' (WO9, AP-9) assigned to Ross Smith. The 'Service tasks' tab is active, showing a table of tasks:

Service Line Item	Name	Service Task Name	Duration
SVC-13 Home Painting ⊕ Scheduled ⊖ Start Work	STL-44 ⊕ Scheduled ⊖ Start Work	Waterproofing --	--
	STL-43 ⊕ Scheduled ⊖ Start Work	Painting --	3 Hr(s)
	STL-42 ⊕ Scheduled ⊖ Start Work	Apply primer --	3 Hr(s)
	STL-41 ⊕ Scheduled ⊖ Start Work	Sand or repair surfaces --	3 Hr(s)
	STL-40 ⊕ Scheduled ⊖ Start Work	Clean and prep wall --	3 Hr(s)

A red arrow points to the 'Start Work' button in the top right corner of the appointment details.

4. Click **Start Work** in the confirmation message. Click Edit Details to view the *Add Time Sheet* overlay.

The confirmation message overlay displays the following information:

- AP-9**
- Service Resource: Ross Smith
- Start Time: Oct 06, 2022 23:10 PM
- Service & Task Details:
- Home Painting(SVC-13)
- Waterproofing (STL-44)
- Painting (STL-43)
- Apply primer (STL-42)
- Sand or repair surfaces (STL-41)
- Clean and prep wall (STL-40)

At the bottom, there are three buttons: 'Edit Details' (with a red arrow pointing to it), 'Cancel', and 'Start Work'.

In the *Add Time Sheet* overlay, edit details if necessary and click **Save**:

Add Time Sheet

Time Sheet Information

Service Resource: Ross Smith

Description:

Start Date/Time: Oct 06, 2022 11:15 PM (GMT -07:00)

Service: Home Painting (SVC-13) Scheduled, Quantity: 1

- Waterproofing (STL-44)
- Painting (STL-43)
- Apply primer (STL-42)
- Sand or repair surfaces (STL-41)
- Clean and prep wall (STL-40)

Cancel Save

Start work for the service line item

When you have more than one service line items in an appointment, you can choose to start work on only one of them. When you have, say, two service line items for Home painting, and Flooring, you can start the work on either of them as per your convenience.

1. Select the **Service Appointments** menu from the **Work Order Management** menu.
2. Select the service appointment you want to start work on.
3. Under the **Service and parts** or **Service tasks** tab, click **Start Work** for the service line item you want to work on.

FSM Customers Work Order Management Dispatch Console Services And Parts Assets Workforce Reports Standard Trial Upgrade

Service Appointments > WO9 > AP-9
Remodeling of the Crawford House
Dispatched -None- Ross Smith

Start Work Edit

SA Information
Service(s)
Home Painting (SVC-13)
Flooring (SVC-16)
Scheduled Time
Oct 07, 2022 09:00 AM (GMT -07:00)
Oct 08, 2022 06:00 PM (GMT -07:00)
Actual Time
Appointment not yet started
Assigned Resources
Ross Smith (Lead)

Other Details
Company --
Contact Lucy Robins
Asset --
Due Date --

Address Details
Territory Gosford
Service Address
Service Address

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

Services

Service Line Item Name	Service	Quantity	List Price	Tax Name	Line Item Amount
SVC-13 Scheduled Start Work None	Home Painting --	1 Hours	\$ 20	SalesTax [7%]	\$ 21.4
SVC-16 Scheduled Start Work None	Flooring --	1 Hours	\$ 15	SalesTax [7%]	\$ 16.05

Parts
No Records Found

Sub Total	\$ 100
Tax Amount	--
Discount	--
Adjustment	--
Total	\$ 107

4. Click **Start Work** in the confirmation message. Click **Edit Details** to view the *Add Time Sheet* overlay.



AP-9

Service Resource: Ross Smith

Start Time: Oct 07, 2022 00:10 AM

Service & Task Details:

Home Painting(SVC-13)

Clean and prep wall (STL-40) Sand or repair surfaces (STL-41)

Apply primer (STL-42) Painting (STL-43) Waterproofing (STL-44)

Edit Details  Cancel Start Work

In the *Add Time Sheet* overlay, edit details if necessary and click **Save**:

By default, the available services/service tasks will be selected. You can remove the ones you don't want to start the work on.

Add Time Sheet ✕

Time Sheet Information

Service Resource ✕ 🗑️

Description

Start Date/Time (GMT -07.00)

Service

Home Painting (SVC-13) ✕ ▼

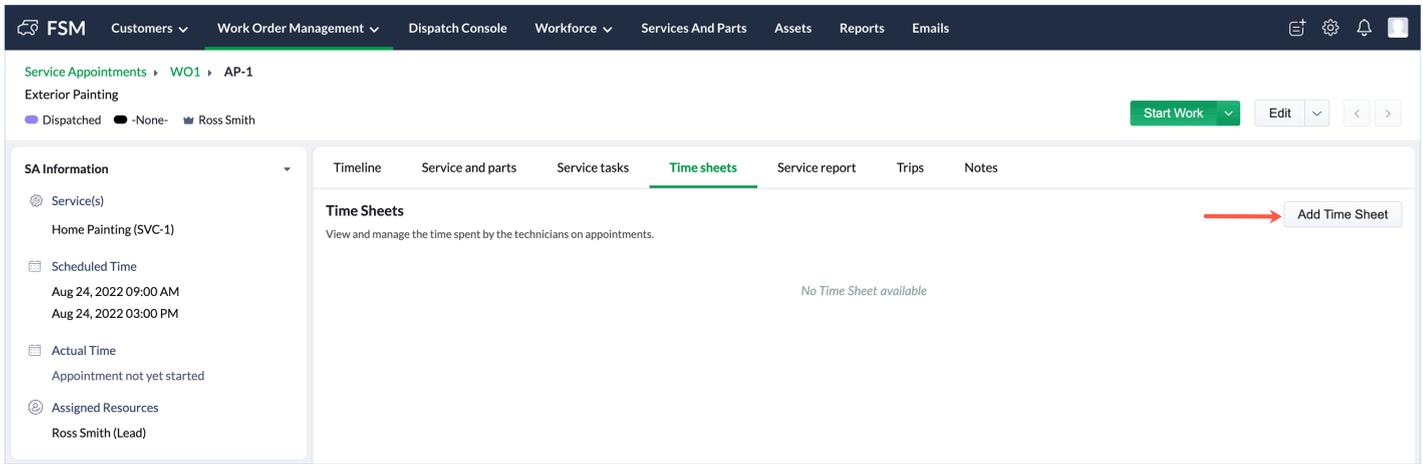
Scheduled, Quantity: 1

- Clean and prep wall (STL-40)
- Sand or repair surfaces (STL-41)
- Apply primer (STL-42)
- Painting (STL-43)
- Waterproofing (STL-44)

Create time sheet for the service line items

You can also start the work on a service line item by adding a time sheet for the it.

1. Select the **Service Appointments** menu from the **Work Order Management** menu.
2. Select the service appointment you want to start work on.
3. Under the **Time sheets** tab, click **Add Time Sheet**.

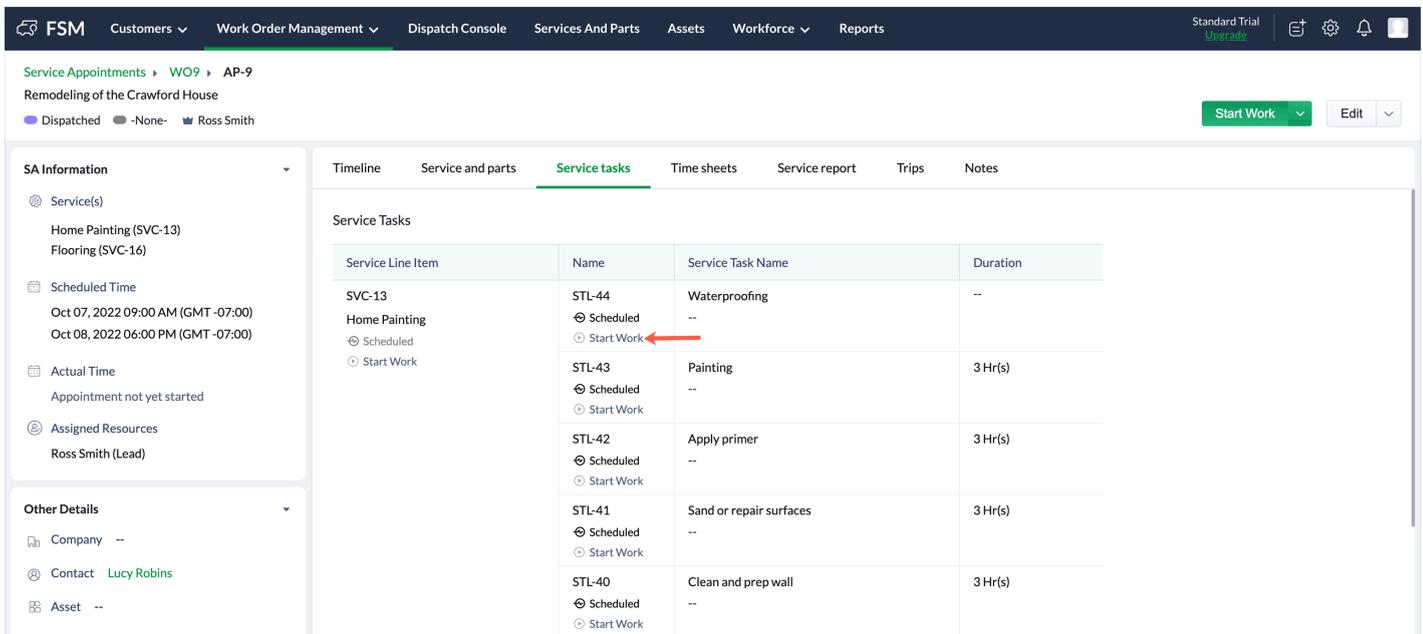


4. In the *Add Time Sheet* overlay, provide the following details and click **Save**:
 - a. Select the **Service Resource**
 - b. A **Start Date/Time**
 - c. Select the services/service tasks you want to start work on.

Start work on individual service tasks

You can start work on individual service tasks in a service appointment. To do so:

1. Select the **Service Appointments** menu from the **Work Order Management** menu.
2. Select the service appointment you want to start work on.
3. Under the **Service tasks** tab, click **Start Work** for the service task you want to work on.



4. Click **Start Work** in the confirmation message. Click **Edit Details** to view the *Add Time Sheet* overlay.



AP-9

Service Resource: Ross Smith

Start Time: Oct 07, 2022 02:10 AM

Service & Task Details:

Home Painting(SVC-13)

Waterproofing (STL-44)

Edit Details

Cancel

Start Work

In the *Add Time Sheet* overlay, edit details if necessary and click **Save**:

Add Time Sheet ✕

Time Sheet Information

Service Resource ✕ 🗑️

Description

Start Date/Time (GMT -07.00)

Service ✕ ▼
Scheduled, Quantity: 1
 (STL-44)

Once you start work, you can partially or fully complete a service task.

The screenshot shows the FSM interface for a work order. The top navigation bar includes 'FSM', 'Customers', 'Work Order Management', 'Dispatch Console', 'Services And Parts', 'Assets', 'Workforce', and 'Reports'. The main header shows 'Service Appointments > WO9 > AP-9' and 'Remodeling of the Crawford House'. A 'Start Work' button is visible. The left sidebar shows 'SA Information' with details for 'Home Painting (SVC-13)' and 'Flooring (SVC-16)'. The main content area is titled 'Service tasks' and contains a table with the following data:

Service Line Item	Name	Service Task Name	Duration
SVC-13 Home Painting	STL-44	Waterproofing	--
	In Progress		
	Partially Complete	Painting	3 Hr(s)
	Complete Work		
	Scheduled		
	Start Work		
	STL-42	Apply primer	3 Hr(s)
	Scheduled		
	Start Work		

Complete work on individual service tasks

You can complete a service line item or service task. To complete a service task:

1. Select the **Service Appointments** menu from the **Work Order Management** menu.
2. Select the service appointment you want to complete.
3. Select the **Service tasks** tab and click **Complete Work** for the service task you want to complete.

The screenshot shows the FSM interface for a work order. The top navigation bar includes 'FSM', 'Customers', 'Work Order Management', 'Dispatch Console', 'Services And Parts', 'Assets', 'Workforce', and 'Reports'. The main header shows 'Service Appointments > WO10 > AP-21' and 'Remodeling of the Crawford House'. A 'Complete Work' button is visible. The left sidebar shows 'SA Information' with details for 'Home Painting (SVC-26)'. The main content area is titled 'Service tasks' and contains a table with the following data:

Service Line Item	Name	Service Task Name	Duration
SVC-26 Home Painting	STL-70	Painting	3 Hr(s)
	In Progress		
	Partially Complete		
	Complete Work	Apply primer	3 Hr(s)
	In Progress		
	Partially Complete		
	STL-68	Sand or repair surfaces	3 Hr(s)
	In Progress		
	Partially Complete		
	STL-67	Clean and prep wall	3 Hr(s)
	In Progress		
	Partially Complete		

4. Click **Complete Work** in the confirmation message.



How would you like to proceed?

The timesheet mentioned will be closed. Choose whether to Partially Complete or Complete the associated line items.

TS28

Home Painting (SVC-26)

Painting (STL-70)

Apply primer (STL-69)

Sand or repair surfaces (STL-68)

Clean and prep wall (STL-67)

Cancel

Complete Work



Partial Completion

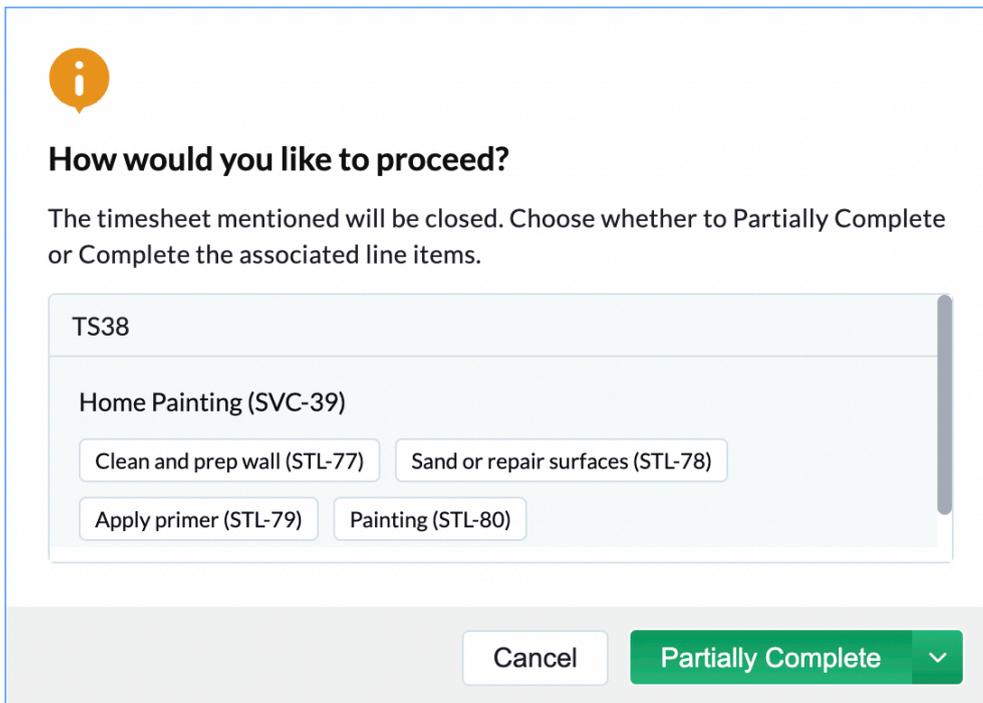
A service line item or service task once started can be partially completed. To partially complete a service task:

1. Select the **Service Appointments** menu from the **Work Order Management** menu.
2. Select the service appointment you want to partially complete.
3. Select the **Service tasks** tab and click **Partially Complete** for the service task you want to partially complete.

The screenshot shows the Zoho FSM interface for a service appointment. The breadcrumb trail is: Service Appointments > WO27 > AP-29. The appointment is titled "Remodeling of the Crawford House" and is in progress, assigned to William Turner. The "Service tasks" tab is selected, showing a table of service tasks. The table has columns for Service Line Item, Name, Service Task Name, and Duration. The tasks listed are: STL-80 (Painting, 3 Hr(s)), STL-79 (Apply primer, 3 Hr(s)), STL-78 (Sand or repair surfaces, 3 Hr(s)), and STL-77 (Clean and prep wall, 3 Hr(s)). The status for each task is "In Progress" with a dropdown menu that includes "Partially Complete".

Service Line Item	Name	Service Task Name	Duration
SVC-39	STL-80	Painting	3 Hr(s)
Home Painting	STL-79	Apply primer	3 Hr(s)
	STL-78	Sand or repair surfaces	3 Hr(s)
	STL-77	Clean and prep wall	3 Hr(s)

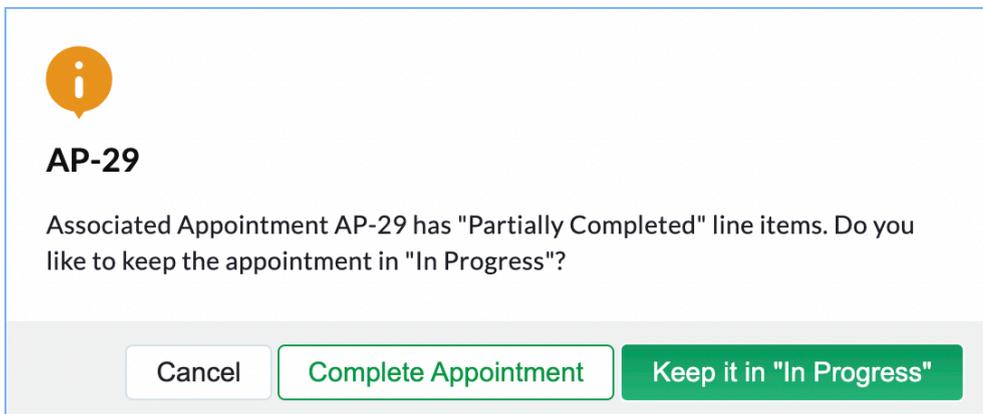
4. Click **Partially Complete** in the confirmation message.



The image shows a confirmation dialog box with an orange information icon at the top left. The title is "How would you like to proceed?". Below the title, it says "The timesheet mentioned will be closed. Choose whether to Partially Complete or Complete the associated line items." A scrollable list contains the timesheet ID "TS38" and a service "Home Painting (SVC-39)". Under the service, there are four line items: "Clean and prep wall (STL-77)", "Sand or repair surfaces (STL-78)", "Apply primer (STL-79)", and "Painting (STL-80)". At the bottom, there are two buttons: "Cancel" and "Partially Complete" with a dropdown arrow.

5. Choose **Keep it in "In Progress"** in the confirmation message.

This message will be shown only if the status of the service appointment is **In Progress**.



The image shows a confirmation dialog box with an orange information icon at the top left. The title is "AP-29". Below the title, it says "Associated Appointment AP-29 has 'Partially Completed' line items. Do you like to keep the appointment in 'In Progress'?". At the bottom, there are three buttons: "Cancel", "Complete Appointment", and "Keep it in 'In Progress'".

The status of the service task will change to **Partially Completed**. The status of the service appointment will remain as **In Progress**.

If you choose **Complete Appointment** in the above confirmation message, then the status of the service appointment will change to **Completed**. The status of the service task will change to **Partially Completed**.

If a service task is partially completed, then the following actions can be performed on the service task:

- In the parent work order, you can create a new service appointment for the partially complete service task
- Link the partially complete service task to another existing appointment from the parent work order
- Resume work

Create new service appointment

When a service task is partially complete, you can create a new service appointment for it under the parent work order. In the original appointment, the status of the service task will continue to be partially complete.

The screenshot shows the FSM interface for a work order (WOS) titled 'Interior painting'. The 'Appointments' tab is active, displaying a table of service appointments. A red arrow points to the 'Create Appointment' button. A red circle highlights the 'Clean and prep wall (STL-37)' service task.

Appointment Name	Total	Status	Actual Start Time	Actual End Time
AP-15 Interior painting	\$ 48.15	In Progress	Aug 29, 2022 05:00 PM	
AP-14 Interior painting	\$ 32.1	Completed	Aug 29, 2022 04:00 PM	Aug 29, 2022 04:30 PM

Link to existing appointment

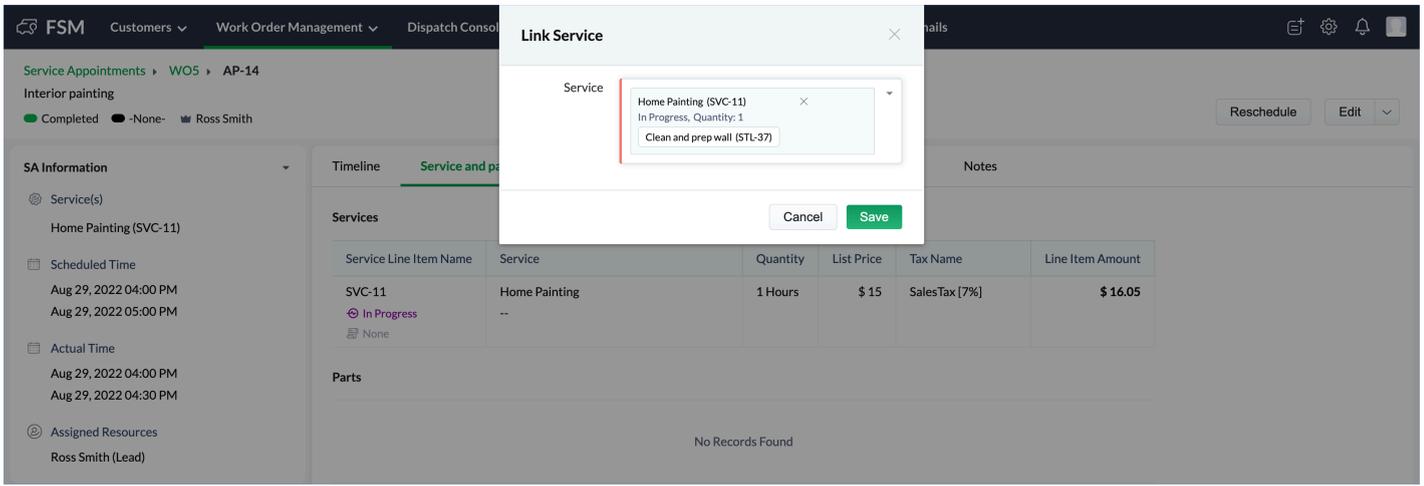
When a service task is partially complete, you can link it to another appointment in the parent work order. To do so:

1. Click on **Link Service** in the appointment to which you want to link the service task.

The screenshot shows the FSM interface for a service appointment (AP-14) titled 'Interior painting'. The 'Link Service' button is highlighted with a red arrow.

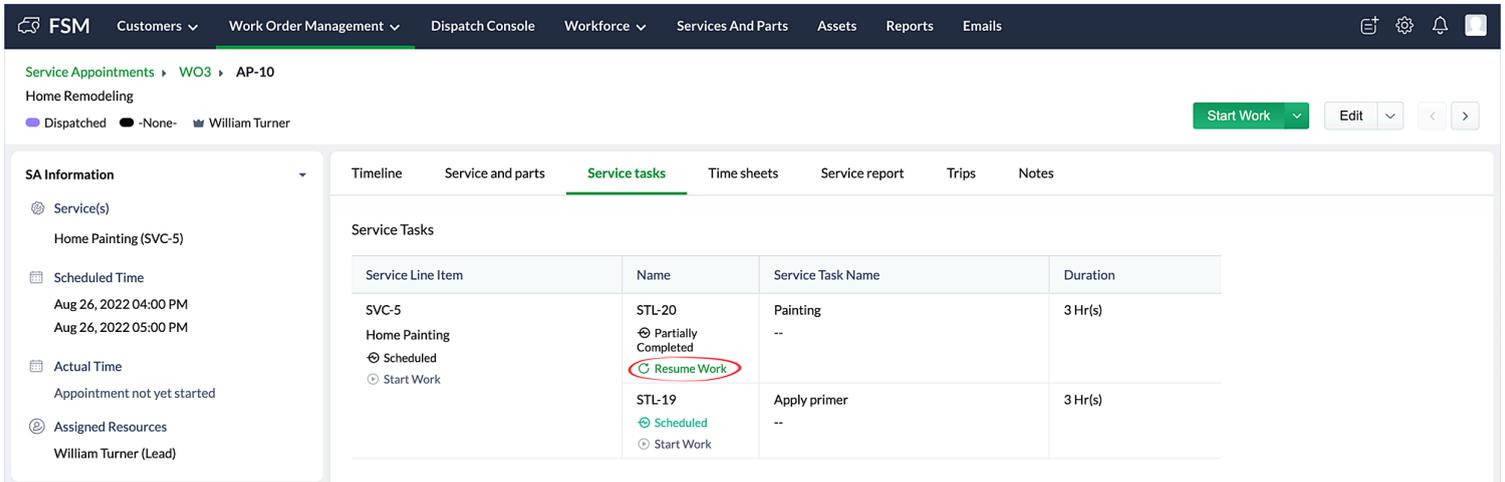
Service Line Item Name	Service	Quantity	List Price	Tax Name	Line Item Amount
SVC-11 In Progress	Home Painting	1 Hours	\$ 15	Sales Tax [7%]	\$ 16.05
None	--				

2. In the *Link Service* pop-up, click **Save**.



Resume work

You can resume work for a partially completed service task at anytime.



Complete Work

You can complete work for a partially completed service task at anytime.

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

Service Appointments > WO10 > AP-21
Remodeling of the Crawford House

Completed -None- William Turner [Reschedule] [Edit]

SA Information

- Service(s)
 - Home Painting (SVC-26)
- Scheduled Time
 - Nov 20, 2022 06:30 PM (GMT -08:00)
 - Nov 20, 2022 07:30 PM (GMT -08:00)
- Actual Time
 - Nov 20, 2022 04:50 AM (GMT -08:00)
 - Nov 20, 2022 04:52 AM (GMT -08:00)
- Assigned Resources
 - William Turner (Lead)

Other Details

- Company --
- Contact **Lucy Robins**
- Asset --

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

Service Tasks

Service Line Item	Name	Service Task Name	Duration
SVC-26 Home Painting Partially Completed Resume Work	STL-70 Partially Completed Resume Work	Painting --	3 Hr(s)
	Complete Work Partially Completed Resume Work	Apply primer --	3 Hr(s)
STL-68 Partially Completed Resume Work	STL-68 Partially Completed Resume Work	Sand or repair surfaces --	3 Hr(s)
	STL-67 Partially Completed Resume Work	Clean and prep wall --	3 Hr(s)

In the confirmation message, click **Complete Work** to continue.



How would you like to proceed?

The timesheet mentioned will be closed. Choose whether to Partially Complete or Complete the associated line items.

TS29

Home Painting (SVC-26)

Clean and prep wall (STL-67)

Sand or repair surfaces (STL-68)

Apply primer (STL-69)

Painting (STL-70)

Cancel

Complete Work 

In case there are partially completed line items in the service appointment and the status of the service appointment is **In Progress**, then you will be shown a confirmation message.



AP-57

Associated Appointment AP-57 has "Partially Completed" line items. Do you like to keep the appointment in "In Progress"?

Cancel

Complete Appointment

Keep it in "In Progress"

The status of the service task will change to **Completed**. If you choose **Keep it in "In Progress"** the status of the service appointment will remain as **In Progress**. If you choose **Complete Appointment** in the above confirmation message, then the status of the service appointment will change to **Completed**.

Appointment Billing Status

The Service Appointments will have a Billing Status that will be determined based on the [invoices](#) created for the service line items in the service appointment.

- **None**: When no invoice has been created for any of the service line items of the service appointment
- **Partially Invoiced**: When at least one of the service line items of the service appointment is invoiced
- **Invoiced**: When all the service line items of the service appointment have been invoiced.
- **Partially Paid**: When all the service line items are invoiced and at least one of the invoices has been paid.
- **Paid**: When all the invoices created for the service line items of the service appointment have been paid.

The screenshot displays the FSM interface for a service appointment. The top navigation bar includes 'FSM', 'Customers', 'Work Order Management', 'Dispatch Console', 'Workforce', 'Services And Parts', 'Assets', 'Reports', and 'Emails'. The main content area shows 'Service Appointments > WO6 > AP-17' with 'Interior painting' as the service name. A red arrow points to the 'Invoiced' status indicator. Below this, there are 'Start Work' and 'Edit' buttons. The left sidebar contains 'SA Information' with details for 'Home Painting (SVC-12)', including scheduled and actual times, and assigned resources like 'William Turner (Lead)'. The main timeline shows actions such as 'Time Sheet TS21 created' and 'Service Appointment details updated' on August 30, 2022, along with financial updates like 'Total updated from Blank to 278.2'.

These appointment billing status will be displayed on the horizontal bars in the Gantt view of the Dispatch Console.

The screenshot displays the Zoho FSM interface. On the left, a list of service tasks is shown under appointment AP-10 and AP-1. The tasks include 'Home Painting', 'Waterproofing', 'Painting', 'Apply primer', 'Sand or repair surfaces', 'Clean and prep wall', and 'TV Installation'. On the right, a Gantt chart for appointment AP-1 shows two time slots: 'AP-2 1 Hr' and 'AP-1 1 Hr, 40 min'. A red arrow points to the 'Invoiced' status of the AP-1 slot.

Remove Service Tasks

You can remove the service tasks from a service appointment or a work order in the following ways:

- Delink from appointment
- Delete from work order
- Delete service tasks

Delink from appointment

You can delink a service task from an appointment from the *Edit Service Appointment* overlay. When you delink a service task from an appointment, it will be removed from the appointment, and its status in the work order will be changed to New.

If the service task you are trying to delete is part of a timesheet, then you will encounter the error shown in the screenshot below.



Line Items in Use

The line items you want to delete are used in the timesheets listed below. Delete these timesheets before attempting to delete the line items.

Service	Timesheets
STL-36	<div style="border: 1px solid #ccc; border-radius: 5px; padding: 2px; display: inline-block; margin-bottom: 5px;">TS14</div> <div style="border: 1px solid #ccc; border-radius: 5px; padding: 2px; display: inline-block;">TS20</div>

OK

Delete from work order

From the *Edit Service Appointment* overlay, you can delete a service task from the work order.

Edit Service Appointment

Sub Total
 Tax Amount
Discount \$
 Adjustment
 Total

Service Tasks

Service Line Item	Service Task Name	Duration	
Home Painting	Apply primer <input type="text" value="Add a Description"/>	<input type="text" value="3 Hr"/> <input type="text" value="0 Min"/>	<input type="button" value="⊖"/>
	Painting <input type="text" value="Add a Description"/>	<input type="text" value="3 Hr"/> <input type="text" value="0 Min"/>	<input type="button" value="⊖"/>
			<input type="button" value="+ Add"/>

Skills

Delink from Appointment
Delete from Work Order

Delete service tasks

You can remove service tasks from the *Edit Work Order* overlay. Click on the remove icon [⊖] to delete the service task from the work order.

Edit Work Order

Service Tasks

Service Line Item	Service Task Name	Duration	
Home Painting	Clean and prep wall <input type="text" value="Add a Description"/>	3 Hr 0 Min	⊖
	Sand or repair surfaces <input type="text" value="Add a Description"/>	3 Hr 0 Min	⊖
	Apply primer <input type="text" value="Add a Description"/>	3 Hr 0 Min	⊖
	Painting <input type="text" value="Add a Description"/>	3 Hr 0 Min	⊖
			+ Add
Home Painting	Clean and prep wall <input type="text" value="Add a Description"/>	3 Hr 0 Min	⊖
	Apply primer <input type="text" value="Add a Description"/>	3 Hr 0 Min	⊖

Cancel Save

If the service task you are trying to delete is part of a timesheet, then you will encounter the error shown in the screenshot below.



Line Items in Use

The line items you want to delete are used in the timesheets listed below. Delete these timesheets before attempting to delete the line items.

Service	Timesheets
STL-36	TS14 TS20

OK

View Service Tasks in Dispatch Console

For each appointment, its related Services and Service Tasks will be listed in the tabular view of the left panel.

The screenshot displays the FSM Dispatch Console interface. The left panel, titled 'All Service Appointments', shows a list of appointments for September 26, 2022. The appointments are:

- AP-2 (Home Refurbishment) - Completed, William Tur...
 - SVC-4 (Home Painting) - Partially Co...
 - STL-12 (Painting) - Partially Co...
 - STL-11 (Apply primer) - Partially Co...
 - STL-10 (Sand or repair surfaces) - Partially Co...
 - STL-9 (Clean and prep wall) - Partially Co...
- AP-1 (TV wall mounting) - Completed, William Tur...
 - SVC-3 (TV Installation) - Completed

The right panel, titled 'Gantt', shows a Gantt chart for the same date. It displays two appointments: AP-2 (1 Hr) and AP-1 (1 Hr, 40 min). The chart shows the time slots for each appointment, with AP-2 starting at 02:30 AM and AP-1 starting at 04:10 AM. The chart also shows the field technician assigned to each appointment: Ross Smith (0 appointments) and William Turner (2 appointments).

Using service tasks in the mobile app

The service task can be used in the [work order](#) and [service appointment](#) from the mobile app.

