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# Service Territory Management

**Service territories** are domains that can be geographical, departmental, commercial, or based on any other way you want to segment your business. This demarcation helps you manage service requests and service personnel. For example, service territories can be different regions where an organization provides their field services. Service personnel such as dispatchers and field agents are assigned to these service territories who then handle the service requests in their region.



Available in Editions: **Standard, Professional**

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## Create Service Territories

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

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

To create service territories:

1. Navigate to **Setup > Workforce > Territories** and click **New Territory**.
2. Enter the following details, then click **Create**:
  - a. A name in the **Territory Name** field.
  - b. The address of the service territory base in the **Street, City, State, Postal Code, and Country** fields.
  - c. A **Description**.

### Create Territory ✕

Territory Name

Street

City

State

Postal Code

Country

Description

The newly added service territory will be listed as shown below:

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

**Setup**

- ▶ General
- ▼ Workforce
  - Users
  - Profiles
  - Service Territories
  - Skills
- ▶ Field Service Settings
- ▶ Customization
- ▶ Email
- ▶ Automation
- ▶ Billing
- ▶ Data Administration
- ▶ Developer Space

### Service Territories Help

Define your organization's service territories. Service territories help you map field technicians and dispatchers to service areas, thereby enabling assignment of the right technician to service requests received in a region.

Active Territories ▾

New Territory

Territory Name	Description	Created By	Created Time
Westbrook		Mary Cooper	Mar 14, 2023 11:12 AM
Bromley		Mary Cooper	Oct 21, 2022 02:38 PM
Colona		Mary Cooper	Apr 20, 2022 06:25 PM
Zylker		Mary Cooper	Apr 20, 2022 05:50 PM

You can also search for a service territory from the territories list by clicking on the search [Q] field and typing in a name.

**Setup**

- General
- Workforce
  - Users
  - Profiles
  - Service Territories
  - Skills
- Field Service Settings
- Customization
- Email
- Automation
- Billing
- Data Administration
- Developer Space

**Service Territories**

Define your organization's service territories. Service territories help you map field technicians and dispatchers to service areas, thereby enabling assignment of the right technician to service requests received in a region.

Active Territories

[New Territory](#)

Territory Name	Description	Created By	Created Time
Westbury		Mary Cooper	Mar 14, 2023 11:15 AM
Westbrook		Mary Cooper	Mar 14, 2023 11:12 AM

**i** A default service territory will be added when a new Zoho FSM account is created.

## Editing Service Territories

To edit service territories:

1. Navigate to **Setup > Workforce > Territories**.
2. Click the name of the service territory you want to edit. Click **Edit**. Modify the required details and click **Save**.

You can also find the **Edit** [✎] option by hovering over the service territory.

**Territory**

**Westbrook**

Active 01 Mary Cooper Mar 14, 2023 11:12 AM

[Add Resource](#)

[Edit](#)

**Overview** **Resources**

**Active Resource**

Full Name	Type	Start Date	End Date
Karen Edwards	Agent	Mar 14, 2023	

**Inactive Resource**

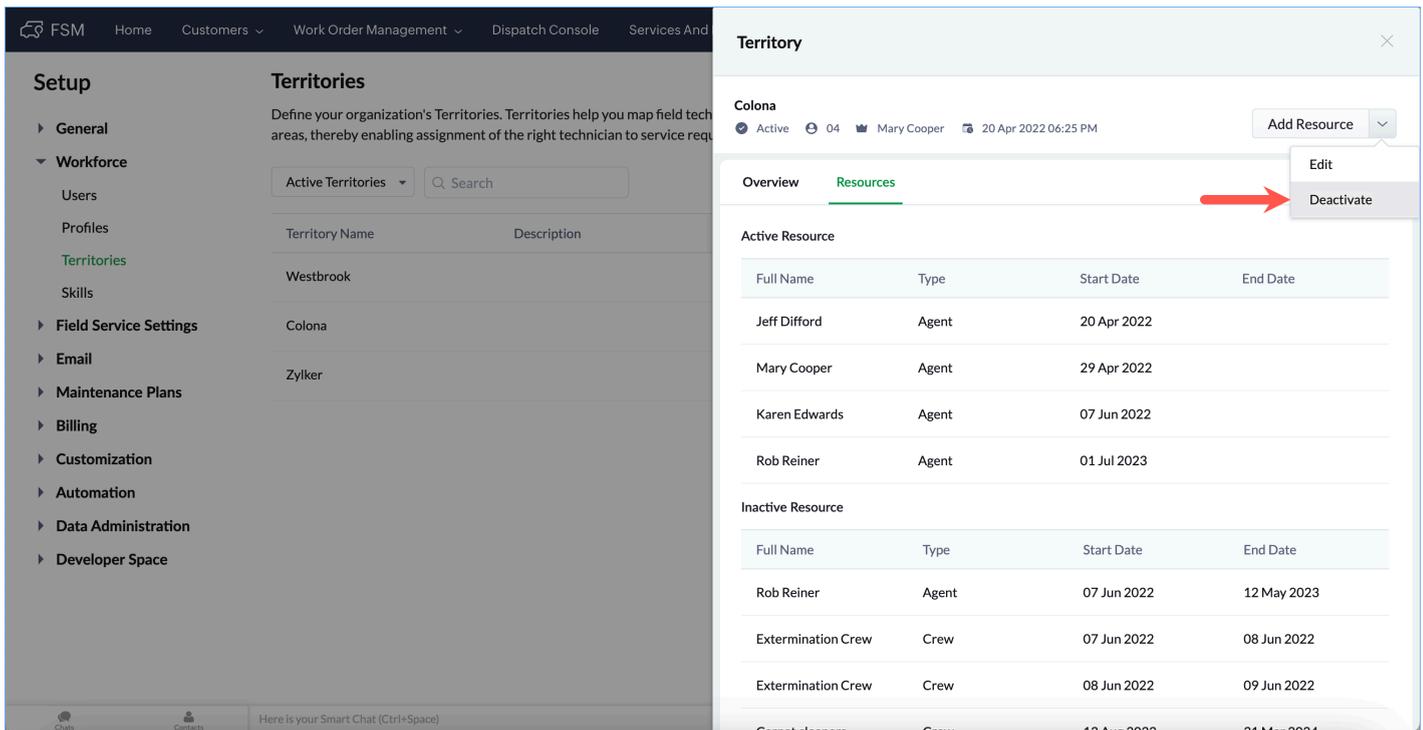
No Records found

# Deactivate Service Territories

Deactivating a territory is an irreversible action. A territory once deactivated cannot be reactivated again.

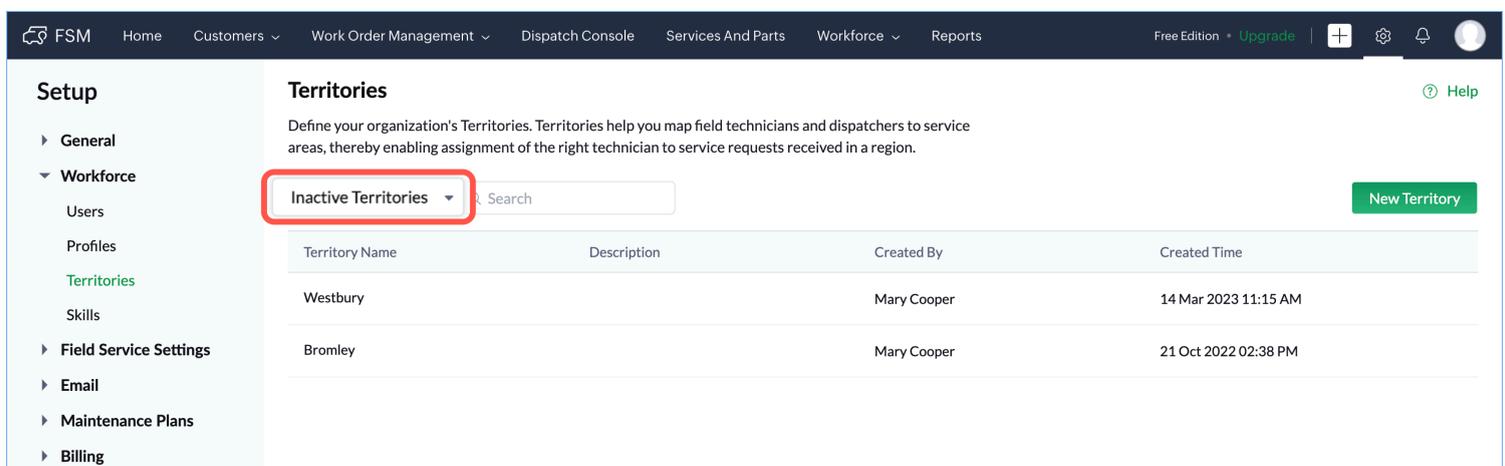
To deactivate service territories:

1. Navigate to **Setup > Workforce > Territories**.
2. Click the name of the service territory you want to deactivate. Click **Deactivate**.  
You can also find the **Deactivate** [ 🗑️ ] option by hovering over the service territory.



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

The deactivated resources can be seen under the **Inactive Territories** list.



## Points to remember

1. The users and crew assigned to the territory will be removed from the territory. In these users and crews, the date of deletion will be set as the **End Date Time** for this territory.

The screenshot shows the FSM interface for a crew named 'Carpet cleaners'. The crew information includes 'Carpet cleaning crew for dry vacuuming', 'Rob Reiner', and 'Colona'. The 'Territories' tab is active, displaying a table with the following data:

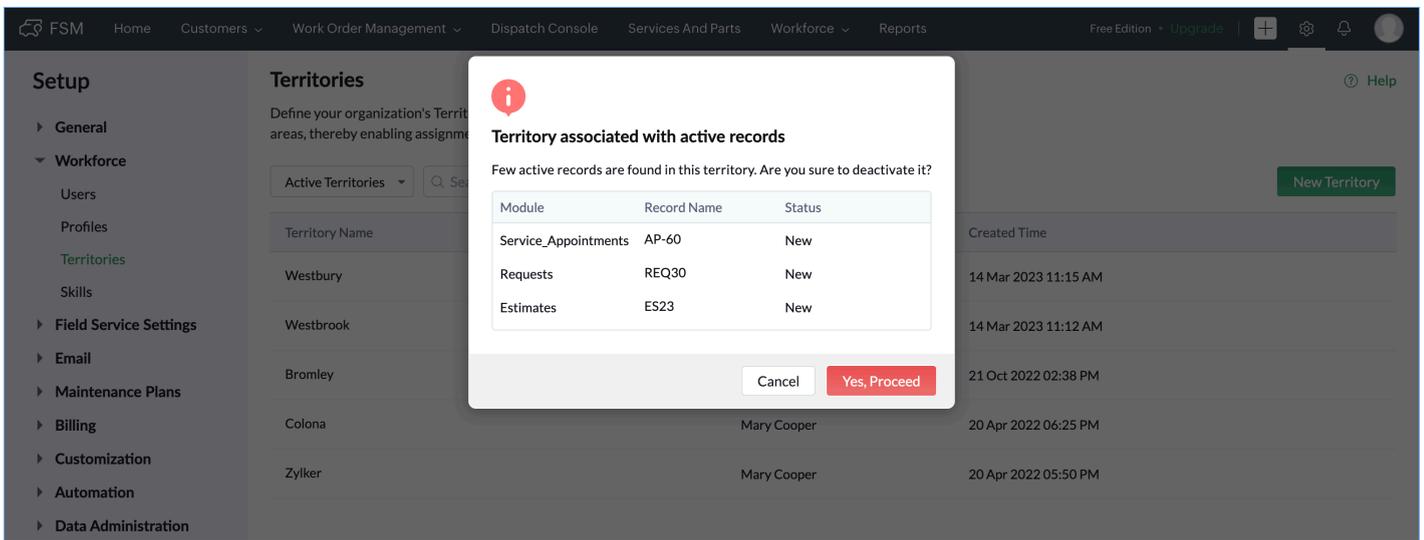
Name	Start Date Time	End Date Time
Bromley	01 Mar 2024	01 Apr 2024
Colona	13 Aug 2022	31 Mar 2024

2. If there are active crews associated with the territory, then you will not be allowed to delete the territory, and you will encounter an error. You will first need to deactivate the crews the territory is associated with.

The screenshot shows the 'Territories' setup page in FSM. A red error message is displayed: 'Unable to deactivate the territory because there are active crews within it. Please deactivate the crews first to remove this territory.' The table below lists the territories:

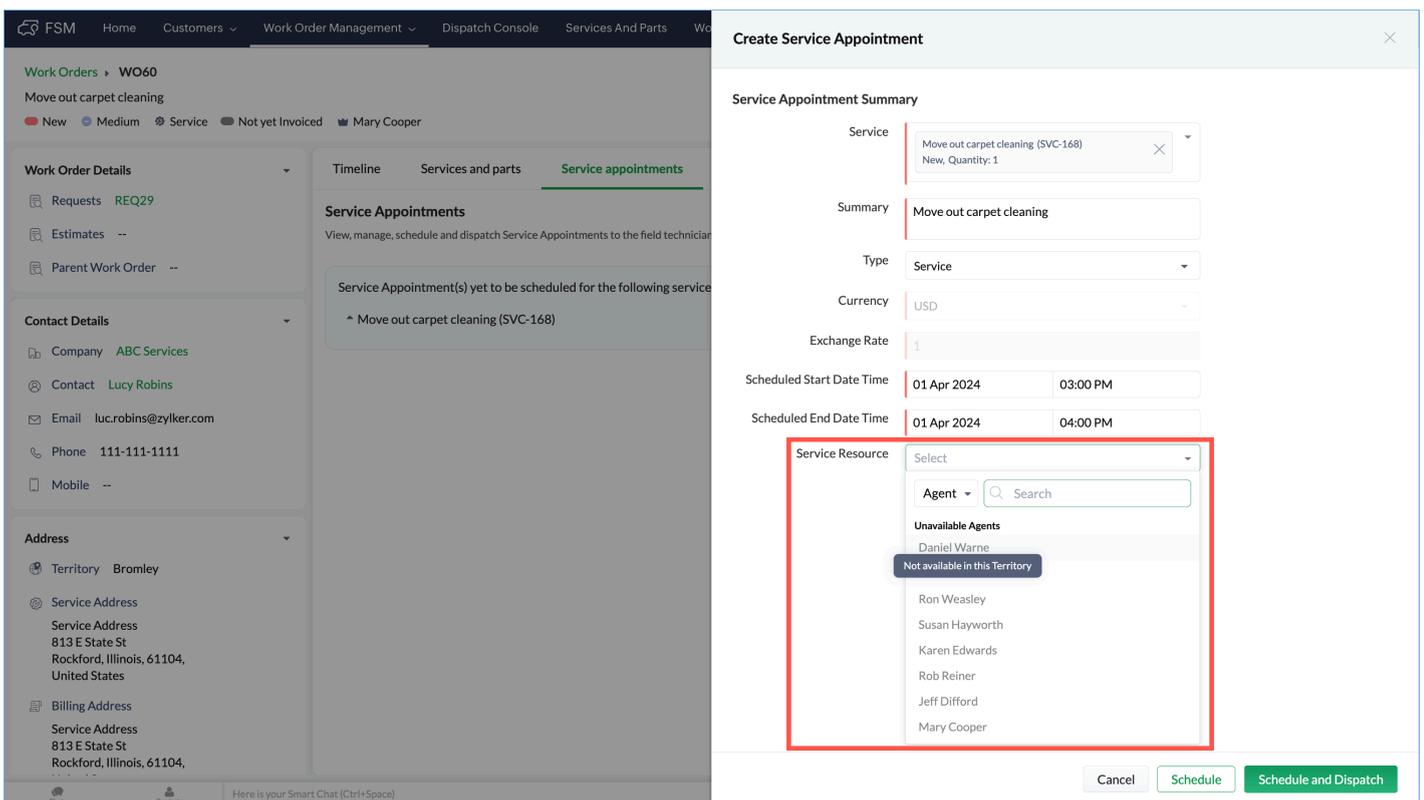
Territory Name	Description	Created By	Created Time
Westbury		Mary Cooper	14 Mar 2023 11:15 AM
Westbrook		Mary Cooper	14 Mar 2023 11:12 AM
Bromley		Mary Cooper	21 Oct 2022 02:38 PM
Colona		Mary Cooper	20 Apr 2022 06:25 PM
Zyker		Mary Cooper	20 Apr 2022 05:50 PM

3. If there are transactional records (Requests, Estimates, etc.) associated with the territory, those records will be listed. Click on **Yes, Proceed** if you want to deactivate the territory.

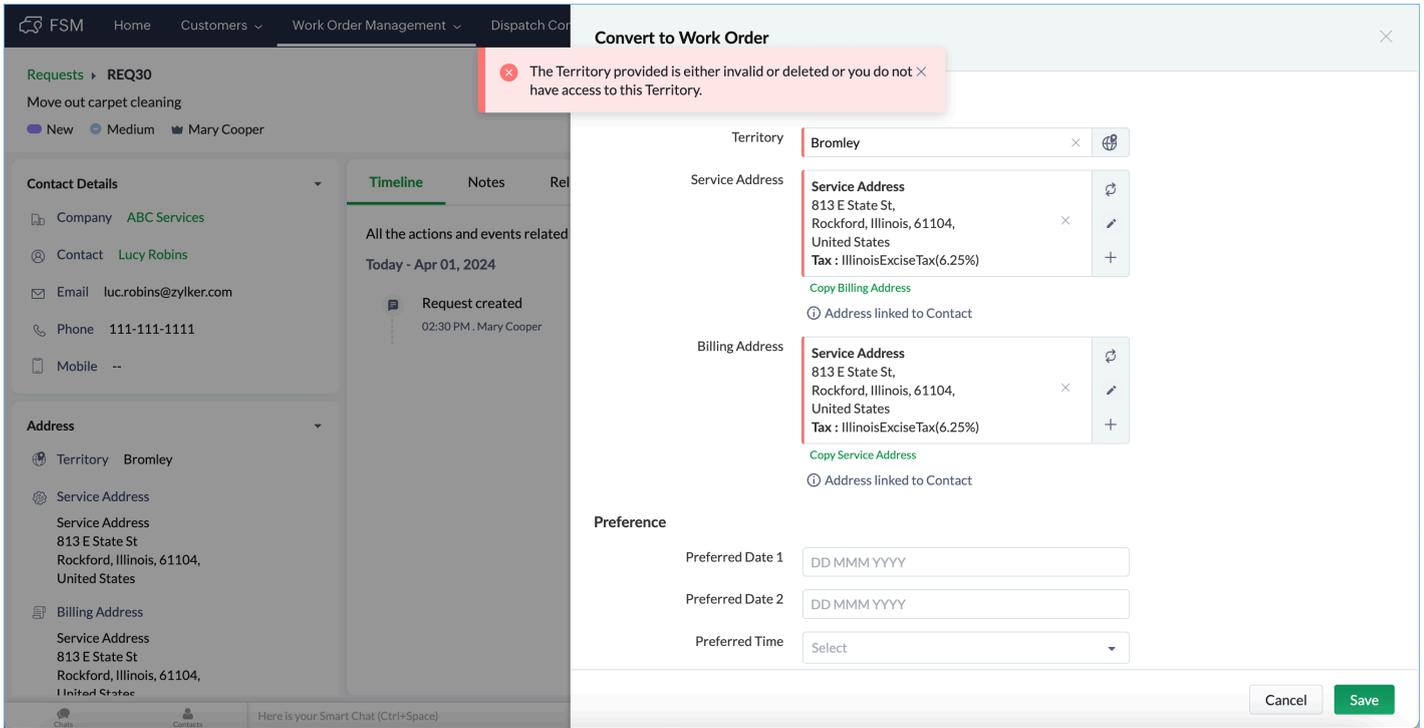


When you deactivate a territory, the associated transactional records will be affected as follows:

- You will not be able to create a service appointment for a work order with the deleted territory. You will have to clone the work order to change the territory. In the service appointment, all the service resources will be listed as unavailable.



- If the request or estimate that you are trying to convert to an estimate or work order has a deleted territory, then you will need to change the territory.



## View Service Territories

The details about a service territory will be displayed under the following sections:

### Overview

The overview displays all the details about the service territory.

### Territory

**Westbrook**

Active 0 Mary Cooper Mar 14, 2023 11:12 AM Add Resource

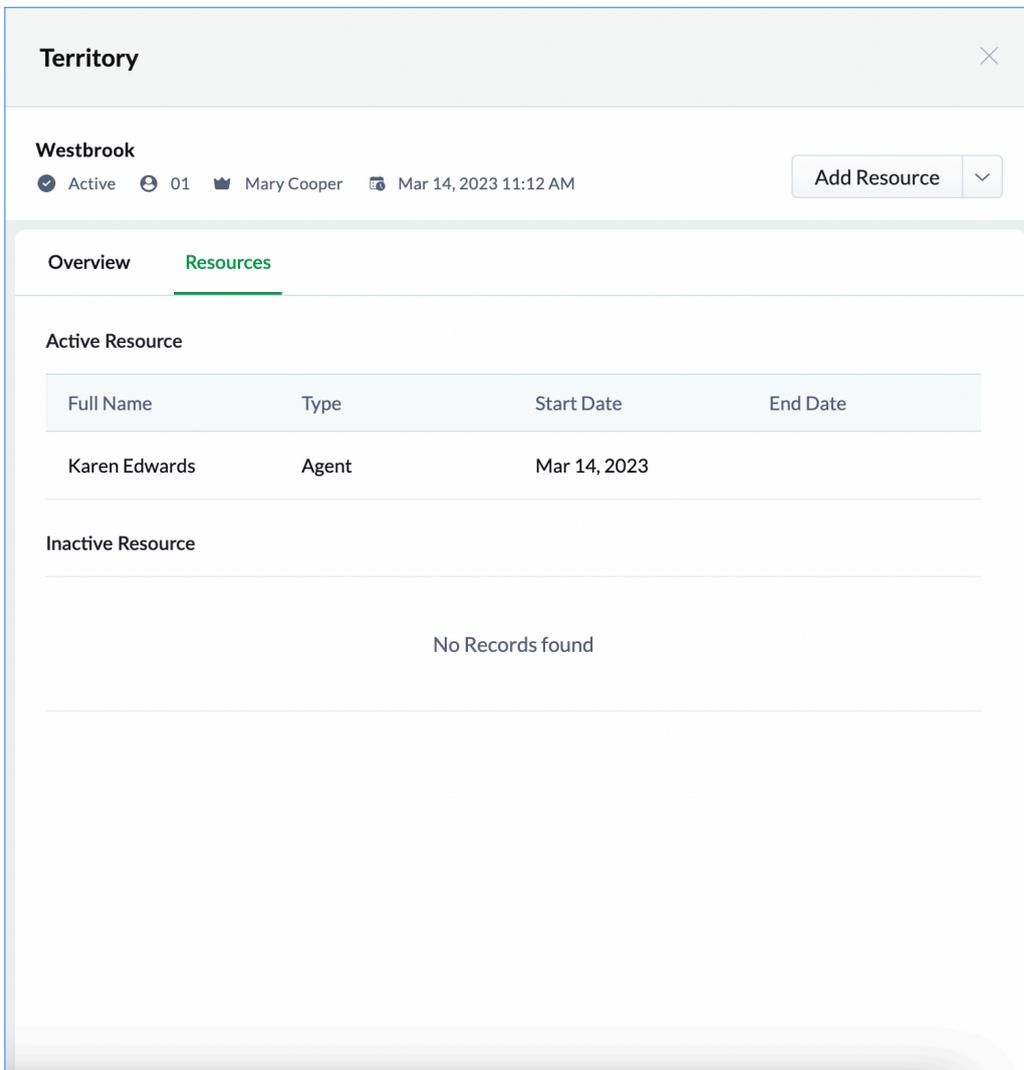
**Overview** Resources

**Territory Details**

Territory Name	Westbrook
Street	1318 W Glenn Ave
City	Springfield
State	Illinois
Postal Code	62704
Country	United States
Description	--

## Resources

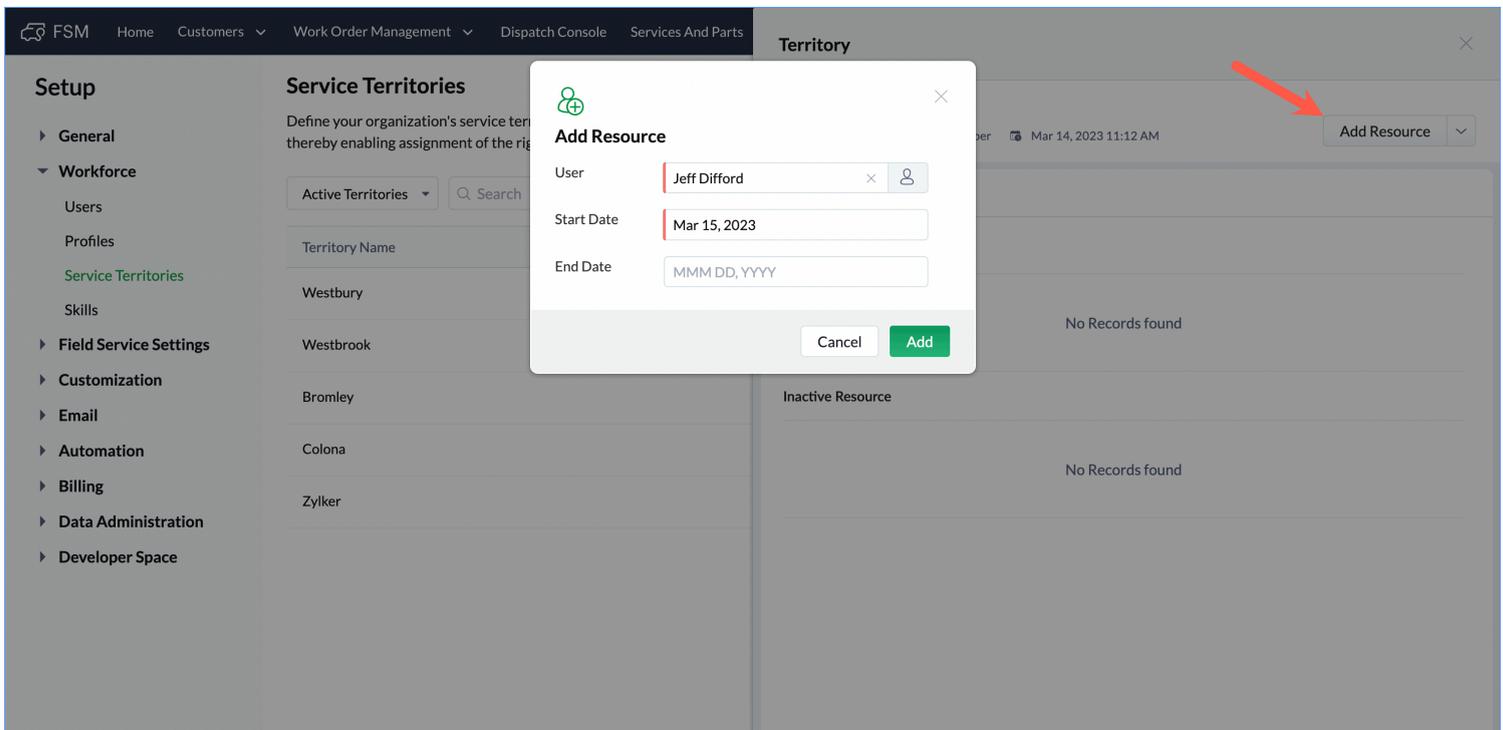
All the service resources assigned to the territory will be listed here. A service resource is active in a territory if their **End Date** for the territory is not in the past.



## Add Resource

To add a resource to a territory:

1. Click the name of the service territory you want to add the resource to.
2. In the *Territory* overlay, click **Add Resource**.  
Alternatively, hover over the service territory and select **Add Resource** from the **more options** [ : ] menu.
3. Select a user, and set the **Start Date** and the **End Date** and click **Add**.  
The period between the **Start Date** and the **End Date** is when the user will be active in that territory.



Only after you assign a territory to the user, will:

- The user be listed in the **Service Resource** dropdown of the *Create Appointment* overlay, provided the service appointment is created for the same territory.
- The user be listed under the territory in the Gantt view of Dispatch Console

Hover over an entry and click the Edit [✎] icon to modify it.

# Territory



## Westbrook

Active 01 Mary Cooper Mar 14, 2023 11:12 AM

Add Resource

Overview **Resources**

### Active Resource

Full Name	Type	Start Date	End Date
Jeff Difford	Agent	Mar 15, 2023	

### Inactive Resource

No Records found