Standard Modules and Fields

The standard modules in FSM are:

Requests	Estimates	Work Orders
Contacts	Companies	Services And Parts
Assets		

Requests

Field Name	Description
Summary	A brief description of the request
Priority	Urgency of the request, whether Critical, High, Medium, or Low
Contact	The contact for whom the request is being created
Company	The company associated with the contact
Email	The email of the contact
Service Address Name	The address of the contact's location where the service task needs to be carried out
Billing Address Name	The address for billing and invoicing
Phone	The contact phone number
Preferred Slot	The preferred time when they would like the service to be rendered
Preferred Start Time	The start time of a specific preferred time
Preferred End Time	The end time of a specific preferred time
Preference	Any additional requirements regarding the request
Due Date	The date by which the request must be closed
Asset	The asset associated with the request, if any

Estimates

Field Name	Description
Summary	A brief description of the estimate
Request	The request associated with the estimate
Expiry Date	A date until which the estimate will be valid
Contact	The contact for whom the estimate is being created
Company	The company associated with the contact
Email	The email of the contact
Service Address Name	The address of the contact's location where the service task needs to be carried out

Billing Address Name	The address for billing and invoicing
Phone	The contact phone number
Asset	The asset associated with the estimate, if any
Service Name	The services that have to be delivered for the request that the estimate is being created for
Service Quantity	The amount of work associated with the service
Service List Price	The price of the service
Service Discount	Discount available on the price of the service, if any
Service Sub Total	The cost of the service before taxes
Service Tax Name	Taxes on the price of the service, if any
Service Total	The total cost of the service after taxes are applied
Part Name	The equipments/materials necessary for the service tasks
Part Quantity	The amount of the part required
Part List Price	The price of the part
Part Discount	Discount available on the price of the part, if any
Part Sub Total	The cost of the part before taxes
Part Tax Name	Taxes, if any, on the price of the part
Part Total	The total cost of the part after taxes are applied

Work Orders

Field Name	Description
Summary	A brief description of the estimate
Priority	Urgency of the request, whether Critical, High, Medium, or Low
Type	Indicates the nature of the service the work order is being created for, i.e. Service, or Inspection
Contact	The contact for whom the estimate is being created
Company	The company associated with the contact
Email	The email of the contact
Service Address Name	This is the address of the contact's location where the service task needs to be carried out
Billing Address Name	The address for billing and invoicing
Phone	The contact phone number
Preferred Slot	The Preferred time when they would like the service to be rendered
Preferred Start Time	The start time of a specific preferred time
Preferred End Time	The end time of a specific preferred time
Preference	Any additional requirements regarding the request
Due Date	The date by which the work order should be closed
Asset	The asset associated with the work order, if any
Service Name	The amount of work associated with the service
Service Quantity	The amount of work associated with the service
Service List Price	The price of the service
Service Sub Total	The cost of the service before taxes
Service Discount	Discount, if any, available on the price of the service
Service Tax Name	Taxes on the price of the service, if any
Service Total	The total cost of the service after taxes are applied

Part Name	The equipments/materials necessary for the service tasks
Part Quantity	The amount of the part required
Part List Price	The price of the part
Part Discount	Discount, if any, available on the price of the part
Part Sub Total	The cost of the part before taxes
Part Tax Name	Taxes, if any, on the price of the part
Part Total	The total cost of the part after taxes are applied

Contacts

Field Name	Description
Last Name	The last name of the contact
First Name	The first name of the contact
Email	The email of the contact
Service Address	This is the address of the contact's location where the service task needs to be carried out
Billing Address	The address for billing and invoicing
Company	The company associated with the contact
Mobile	The contact mobile number
Phone	The contact phone number
Taxable	Choose whether taxes will be applicable or not
Tax	Choose the tax rate
Tax Exemption	A tax exemption reason, if applicable
Tax Authority	The tax authority under which the tax

Companies

Field Name	Description
Company Name	The name of the company
Website	The company website
Email	The email associated with the company
Service Address	This is the address of the contact's location where the service task needs to be carried out
Billing Address	The address for billing and invoicing
Company Type	The type of the company, e.g. Reseller, Vendor, Supplier, etc
Phone	The phone number associated with the company
Taxable	Choose whether taxes will be applicable or not
Tax	Choose the tax rate
Tax Exemption	A tax exemption reason, if applicable
Tax Authority	The tax authority under which the tax

Services And Products

Field Name	Description
Service Name	The name of the service
Unit Price	The cost of the service
Unit	The unit with which the service will be measured
Description	A brief description of the service
Work Type	The work type to which this service has to be linked

Taxable	Choose whether taxes will be applicable or not
Tax	Choose the tax rate
Tax Exemption	A tax exemption reason, if applicable
Tax Authority	The tax authority under which the tax

Assets

Field Name	Description
Asset Name	The name of the asset
Asset Number	Any serial number associated with the asset
Product	The product with which the asset is associated
GIAI	A global individual asset identifier code
Description	A description of the asset
Purchased Date	Date when the asset was purchased
Installation Date	Date of installation of the asset
Ordered Date	Date when the asset was ordered
Warranty Expiration	Date when the warranty of the asset will expire
Company	The company associated with the contact
Contact	The contact for whom the request is being created
Address	The address where the asset is located
Parent Asset	Any parent asset if available