



# Transaction Settings

**i** Permission Required: [Other Settings](#)

You can toggle the availability of certain features in Zoho FSM. This allows you to determine whether a certain feature should be available to the user or not. You can find these feature controls at **Setup > Field Service Settings > Transaction Settings**.

The screenshot shows the Zoho FSM interface. The top navigation bar includes 'FSM', 'Home', 'Customers', 'Work Order Management', 'Dispatch Console', 'Billing', 'Services And Parts', 'Assets', and 'Professional Trial Upgrade'. The left sidebar lists 'Setup' categories: General, Workforce, Security Control, Field Service Settings (with 'Transaction Settings' selected), Work Types, Record Templates, Channels, Maintenance Plans, Billing, Customization, Automation, Data Administration, Developer Space, and Integration. The main content area is titled 'Transaction Settings' and contains several sections with toggle switches:

- Common**
  - Allow roundoff for transactions: Round off total to the nearest whole number for grand total in transaction. (Toggle: Off)
  - Password protect exported files: The user can protect the files by using password. (Toggle: On)
  - Mobile App Check-In Preference: Prevent users from checking in and checking out without sharing their location. (Toggle: Off)
- Work Orders**
  - Automatically complete a work order: This will automatically mark a work order as complete when all its service line items have been completed. (Toggle: Off)
  - Prompt to complete work order: The user will be prompted to complete the associated work order when completing a service appointment. (Toggle: On)
- Time Sheet**
  - Auto Pause: Automatically pauses time sheets left open after working hours, preventing unwanted appointment consumption and ensuring accurate time tracking. (Toggle: Off)
- Estimates**
  - Estimate - Email Approval: This will allow customer to accept or reject estimate via link shared in the mail. (Toggle: On)

## Round off currency values

Use the toggle switch for **Allow roundoff for transactions** to round the Grand totals in transactions to the nearest whole number. This will be applicable to currency values.

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

Work Orders WO13  
Move out carpet cleaning  
New Medium Service 17 Nov, 2021 Daniel Warne

Manage Appointment Edit

REQUEST  
No Request found

ESTIMATE  
No Estimate found

CONTACT  
Contact  
Joe Molinaro  
test@gmail.com  
Company  
Nebula

ADDRESS  
Territory  
Fillmore  
Service Address  
10 Oak St  
Oconee, Illinois, 62553,  
United States  
Billing Address  
Locust St  
Oconee, Illinois, 62553,

TIMELINE SERVICE AND PARTS APPOINTMENTS NOTES RELATED LIST

Parts

ID	Part Name	Quantity	List Price	Discount	Sub Total	Tax Name	Total
PRT-22	Fiber Rinse DESCRIPTION null SERVICE SVC-17	1 Each	\$ 63.75	—	\$ 63.75	IllinoisSalesTax	\$ 67.73
PRT-23	Oxy Carpet Cleaning Formula 116 oz DESCRIPTION null SERVICE SVC-17	1 Each	\$ 29.99	—	\$ 29.99	IllinoisSalesTax	\$ 31.86
Sub Total							\$ 93.74
Sub Total With tax							\$ 99.59
Grand Total Services + Parts							\$ 205.84

Skills

Skill Name	Service
Carpet Cleaning & Stain Removal	SVC-17

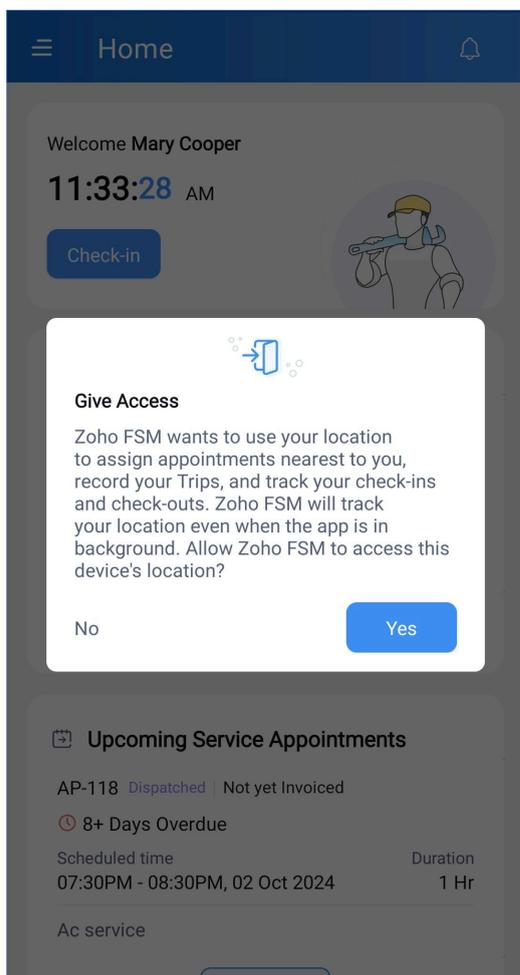
## Password Protect Exported Files

If you enable **Password protect exported files**, then you will have the option to add a password to the files you export from the following places:

- [Export Data](#) from Zoho FSM (**Setup > Data Administration > Data Export**)
- [Export](#) a Zoho FSM report
- [Email](#) a Zoho FSM report as an attachment

## Enforce Location Sharing For Mobile Check-In

If you enable **Mobile App Check-In Preference**, users cannot check-in to the mobile app without providing the location permission.



## Appointment Scheduling Preferences

Mentioned below are the feature controls for appointment scheduling.

### Allow Overlapping Appointments

If you enable this, you will be allowed to schedule overlapping appointments. From the **Allow overlapping** dropdown, choose a value and click **Save** [ ✓ ]. You can choose whether a warning message is shown when creating an overlapping appointment.

### What are overlapping appointments?

Ordinarily, in Zoho FSM, you will not be allowed to schedule/dispatch an appointment for a service resource/equipment between a given Scheduled Start Date Time and Scheduled End Date Time if it overlaps with the scheduled/actual times of any of its existing appointments. However, with the transaction setting **Allow Overlapping Appointments**, you can schedule/dispatch appointments for service resources/equipments even with overlapping timings.

If you choose **Allow overlapping With Warning**, then you will be shown a warning message with the list of appointments which have conflicting schedules with the one you are trying to schedule/dispatch. Click **Continue** to proceed.



### Appointment Conflict Detected

The selected time overlaps with an existing appointment. Please review the conflicting schedules below.

Resource	Appointment	Scheduled Start Time	Scheduled End Time	Actual Start Time	Actual End Time
Daniel Warne	AP-51	29 Oct 2024 10:00 AM	29 Oct 2024 11:00 AM	--	--
Daniel Warne	AP-53	29 Oct 2024 10:00 AM	29 Oct 2024 12:00 PM	--	--
Lori Ross	AP-53	29 Oct 2024 10:00 AM	29 Oct 2024 12:00 PM	--	--
Uniworld Ride On Road Roller	AP-51	29 Oct 2024 10:00 AM	29 Oct 2024 11:00 AM	--	--
Uniworld Ride On Road Roller	AP-53	29 Oct 2024 10:00 AM	29 Oct 2024 12:00 PM	--	--

In the *Service Appointment Details* page, click on the **Info** [ ⓘ ] icon to view the details of the service appointments that have conflicting schedules with this appointment. The number next to the icon indicates the number of appointments with which this appointment has conflicting schedules. Hover over the service resource/equipment names to see who has conflicting schedules. Their name will be encircled in red, and the **Info** [ ⓘ ] icon shown next to their name.

**Overlapping Appointments**

Service Appointments > WO46 > AP-43 ⓘ

Road repair

Scheduled Service Not yet Invoiced Lori Ross

**Service Appointment Info**

Service(s)  
Road Repair (SVC-76)

Scheduled Time  
29 Oct 2024 09:00 AM  
29 Oct 2024 11:00 AM

Scheduled Duration 02:00:00 (HH:mm:ss)

Actual Time  
Service Appointment not yet started

Assigned Service Resources  
Daniel Warne Lori Ross (Lead)  
Uniworld Ride On Road Roller

Contact details  
Company --  
Contact Lucy Robins

**Master Record**

Appointment Name	Status	Billing Status	Scheduled Time	Crew/Agents	Lead
AP-43 Road repair	Scheduled	Not yet Invoiced	29 Oct 2024 09:00 AM 29 Oct 2024 11:00 AM	Lori Ross +2	Lori Ross

Reschedule Cancel Terminate Open in Gantt

**Overlapping Records**

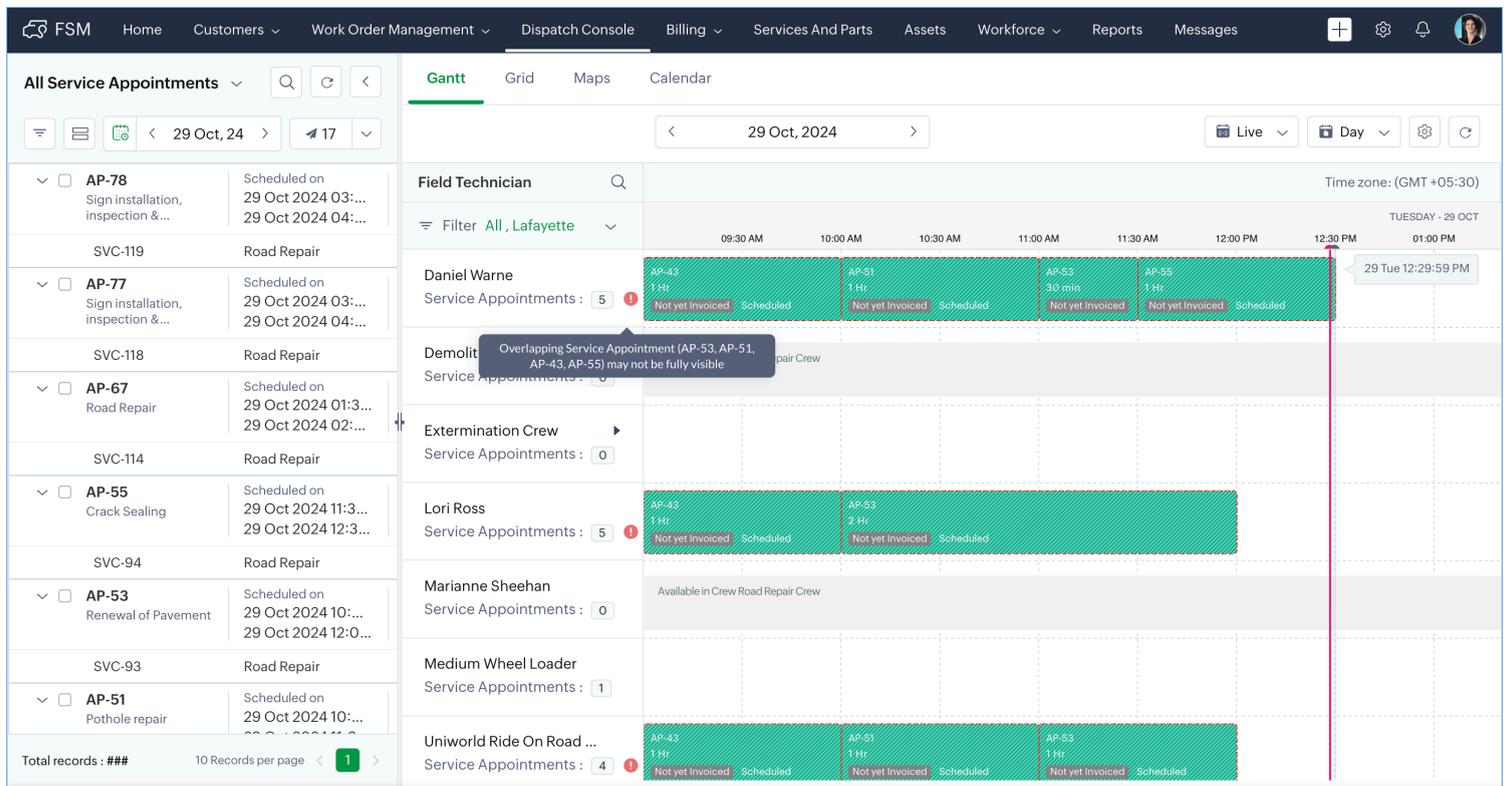
Below is a list of overlapping records.

Appointment Name	Status	Billing Status	Scheduled Time	Crew/Agents	Lead
AP-51 Pothole repair	Scheduled	Not yet Invoiced	29 Oct 2024 10:00 AM 29 Oct 2024 11:00 AM	+1	Daniel Warne
AP-53 Renewal of Pavement	Scheduled	Not yet Invoiced	29 Oct 2024 10:00 AM 29 Oct 2024 12:00 PM	+2	Lori Ross

Reschedule Cancel Terminate Open in Gantt

Cancel

In the Dispatch Console, the overlapping appointments will be shown with a dotted outline.



In the Service Appointment List page, you can use the [FSM List Views Overlapping Service Appointments](#), and [My Overlapping Service Appointments](#) to filter out the overlapping appointments.

## Minimum Interval for Next Appointment (Ongoing)

If you enable this, you can set the time interval that should be maintained between an appointment that you want to schedule for a service resource/equipment and any ongoing appointment of the service resource/equipment.

This time interval will be considered from the **Scheduled End Date Time** of the ongoing appointment or the current time (the Zoho FSM [Org timezone](#) will be considered), whichever is latest.

### Example

Consider that the time interval set is one hour. An appointment is scheduled from 11:00 am to 11:30 am to Lori Ross. The appointment was started at 11:05 am. At 11:15 am, if you try to schedule another appointment for Lori Ross, the latest that you can schedule the appointment for is at 12:30 pm (11:30 am + 1 hr). However, if you try to schedule an appointment for Lori Ross at 11:45 am, the latest that you can schedule the appointment for is at 12:45 pm (11:45 am + 1 hr).

**Note:** Any interval set here will not be considered if [Allow Overlapping Appointments](#) is enabled.

## Automate Work Order Completion

There are two feature controls with which users can choose how to automate work order completion - **Automatically complete a work order**, **Prompt to complete work order**

## Automatically complete a work order

If you enable this feature, the parent work order will be automatically completed when a service appointment is completed; provided the other service appointments of the work order are completed.

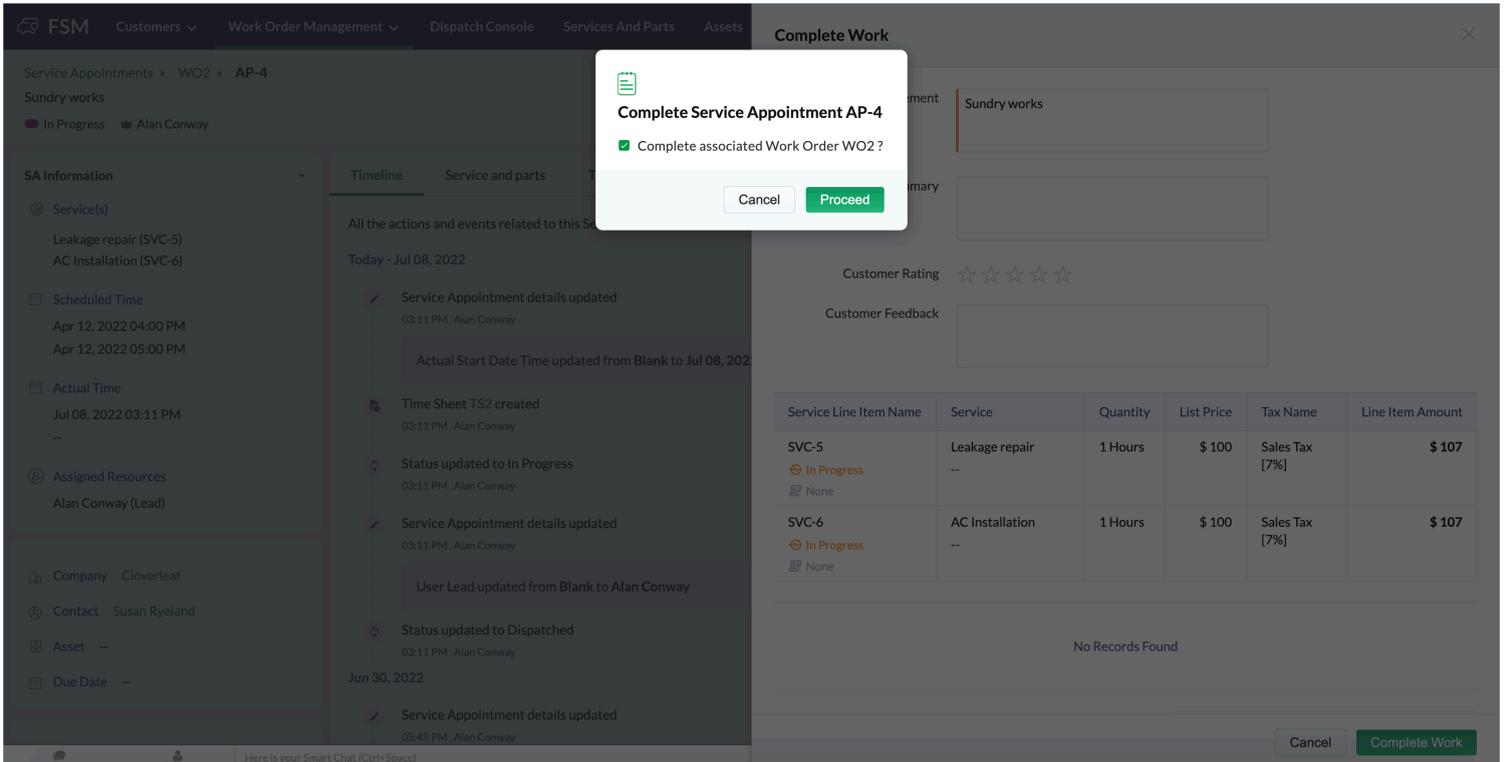
## Prompt to complete work order

If this feature is enabled, each time the user tries to complete a service appointment, they will be given an option to complete the parent work order as well.

To complete the parent work order along with the service appointment using **Prompt to complete work order**:

1. Navigate to **Setup > Field Service Settings > Transaction Settings**.
2. Enable the toggle for **Prompt to complete work order**.
3. Click **Complete Work** in the *Complete Work* overlay of a service appointment.
4. In the confirmation message, select the checkbox **Complete associated Work Order WOX?** and click **Proceed**.

The parent work order will be marked as complete if all the other service appointments associated with the work order are also completed.



The screenshot shows the 'Complete Work' overlay in the FSM interface. A confirmation dialog is displayed in the center, asking 'Complete Service Appointment AP-4' with a checked checkbox for 'Complete associated Work Order WOX?'. The dialog has 'Cancel' and 'Proceed' buttons. The background shows the service appointment details for 'Sundry works' with a table of service line items.

Service Line Item Name	Service	Quantity	List Price	Tax Name	Line Item Amount
SVC-5 In Progress None	Leakage repair --	1 Hours	\$ 100	Sales Tax [7%]	\$ 107
SVC-6 In Progress None	AC Installation --	1 Hours	\$ 100	Sales Tax [7%]	\$ 107

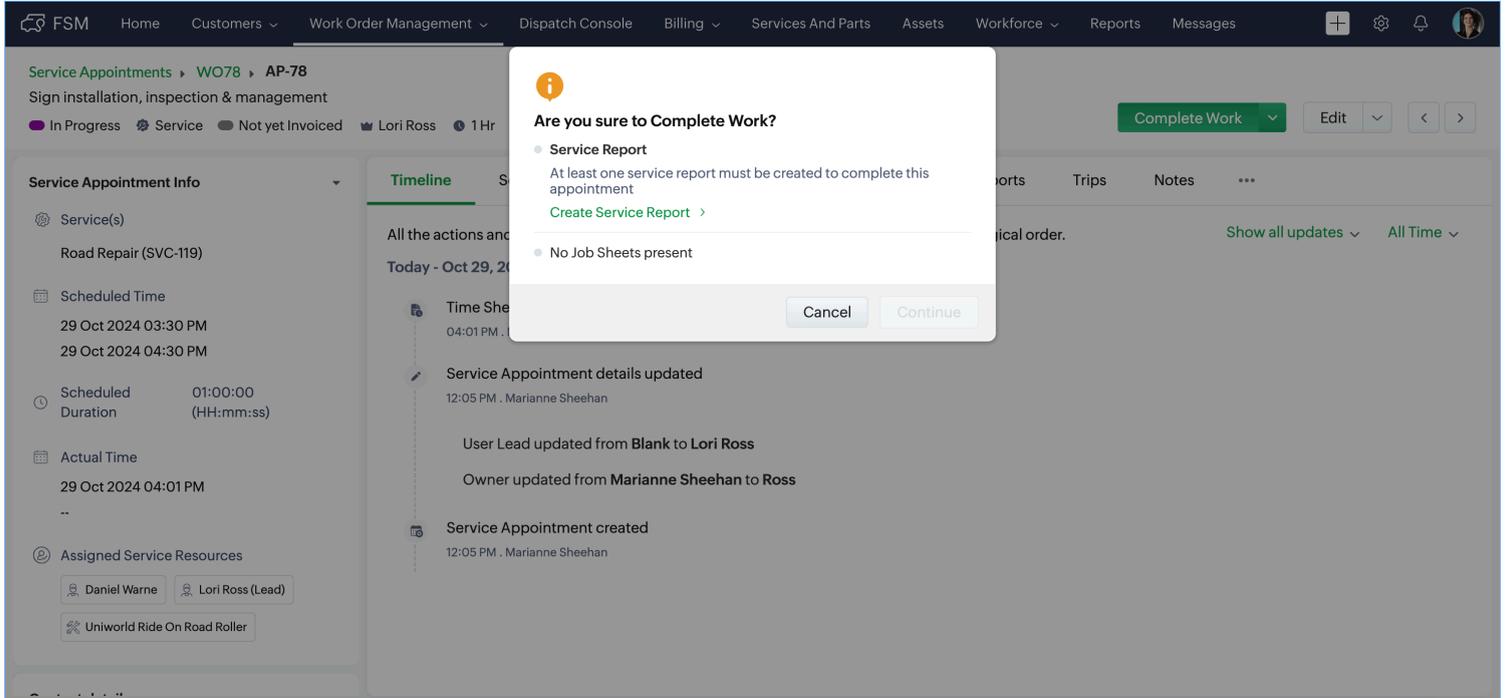
**Note:** **Prompt to complete work order** cannot be enabled if **Automatically complete a work order** is enabled.

## Set Conditions For Service Appointment Completion

There are two feature controls using which you can stipulate the conditions for completing a service appointment - **Service Report required for SA completion, Jobsheets completion required for SA completion.**

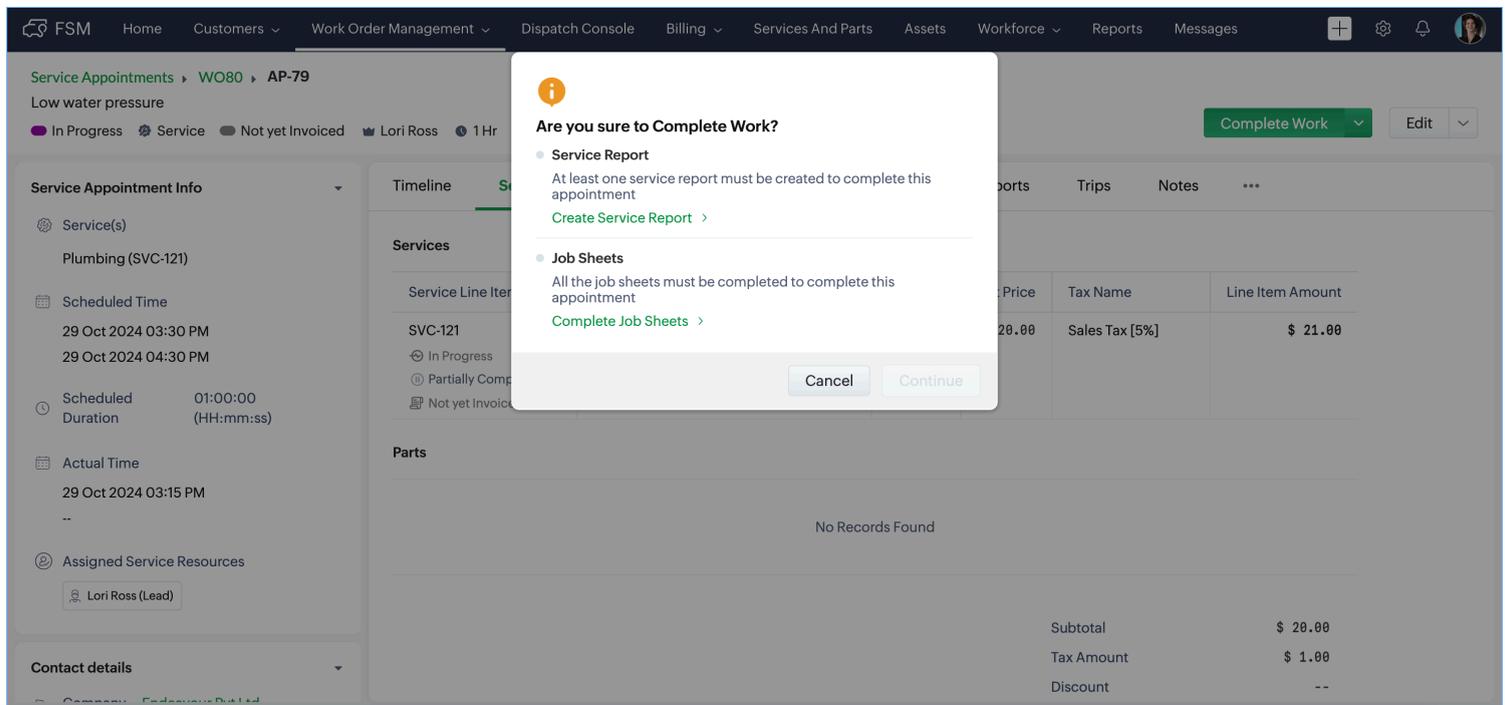
### Service Report required for SA completion

If you enable this setting, creation of a service report will be mandatory for completing a service appointment. When you attempt to complete a service appointment, you will be prompted to create a service appointment. Click **Create Service Report** in the popup message and proceed to create a service report. Once the service report is created, click **Continue**.



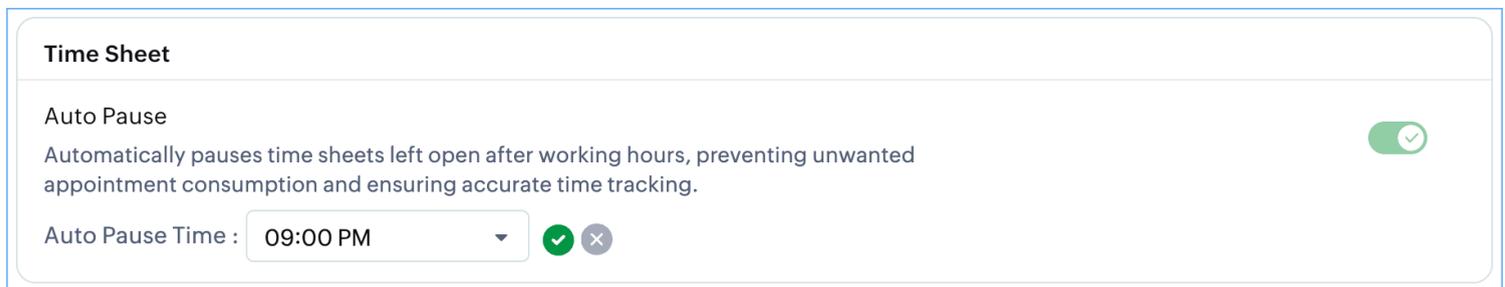
### Jobsheets completion required for SA completion

If you enable this setting, completing the job sheets, if any, will be mandatory for completing the service appointment. When you attempt to complete a service appointment, you will be prompted to complete the job sheets. Click **Create Service Report** in the popup message and proceed to completing the job sheets. Once all the job sheets are completed, click **Continue**.



## Auto Stop Time Sheets

By default, all open time sheets are set to automatically stop at 11:59 pm of the Zoho FSM Org timezone. Refer to [this](#) page for details. You can use the transaction control **Auto Pause** under **Time Sheet** to modify the predefined **Auto Pause Time**. Click on the **Edit** [✎] icon, enter a new time, and click **Save** [✓]. You can also use this control to disable the auto stop of time sheets.



## Allow Overlapping or Concurrent Timesheet Entries

### What is this setting for?

When you enable **Allow Overlapping or Concurrent Timesheet Entries**, you can create a new time sheet for a service resource when there is already an open time sheet for it. You will be able to create or edit time sheets such that they have overlapping timings for the same service resource. This can be for the same or different service appointments.

### When should it be used?

This will allow field technicians to log time for simultaneous repairs or tasks they have to perform within the same visit. They can log time for multiple appointments they might have to work on within the same visit.

**Scenario I:** A plumber is called to fix a dripping faucet, a running toilet, and a shower diverter valve in the same bathroom.

### Simultaneous Tasks:

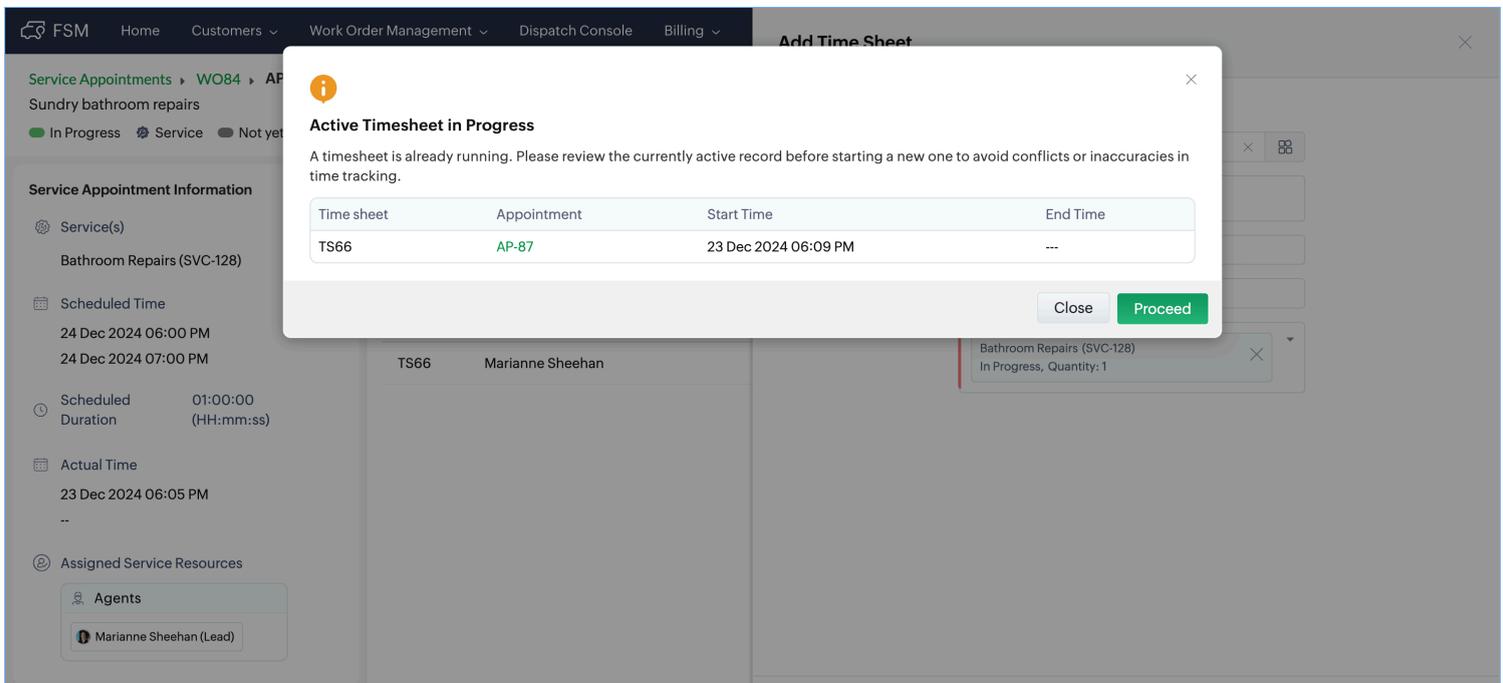
- Allowing sealant on the faucet to dry while moving on to the other tasks.
- Repairing the toilet flush mechanism while replacing the diverter valve.

The screenshot displays the Zoho FSM interface for a service appointment. The top navigation bar includes 'FSM', 'Home', 'Customers', 'Work Order Management', 'Dispatch Console', 'Billing', 'Services And Parts', 'Workforce', 'Reports', and 'Messages'. The main content area is titled 'Service Appointment Information' and shows details for 'Sundry bathroom repairs' (WO84, AP-87) assigned to Marianne Sheehan. The 'Time sheets' tab is active, showing a table of time logs. The table has columns for ID, Service Resource, Description, Start Date/Time, End Date/Time, Duration, and Service & Task Details. Two entries are visible: TS67 (Repairing the toilet flush mecha...) and TS66 (Fixing the dripping faucet). The table is highlighted with a red border.

ID	Service Resource	Description	Start Date/Time	End Date/Time	Duration	Service & Task Details
TS67	Marianne Sheehan	Repairing the toilet flush mecha...	23 Dec 2024 06:12 PM			SVC-128
TS66	Marianne Sheehan	Fixing the dripping faucet	23 Dec 2024 06:05 PM			SVC-128

### How does this work?

In this case, the technician creates a time sheet when they start working on repairing the toilet flush mechanism. Simultaneously, when they start a time sheet for fixing the dripping faucet, they will be shown a dialog box with the details of the existing time sheet. The field technician can click **Proceed** to create a new time sheet.



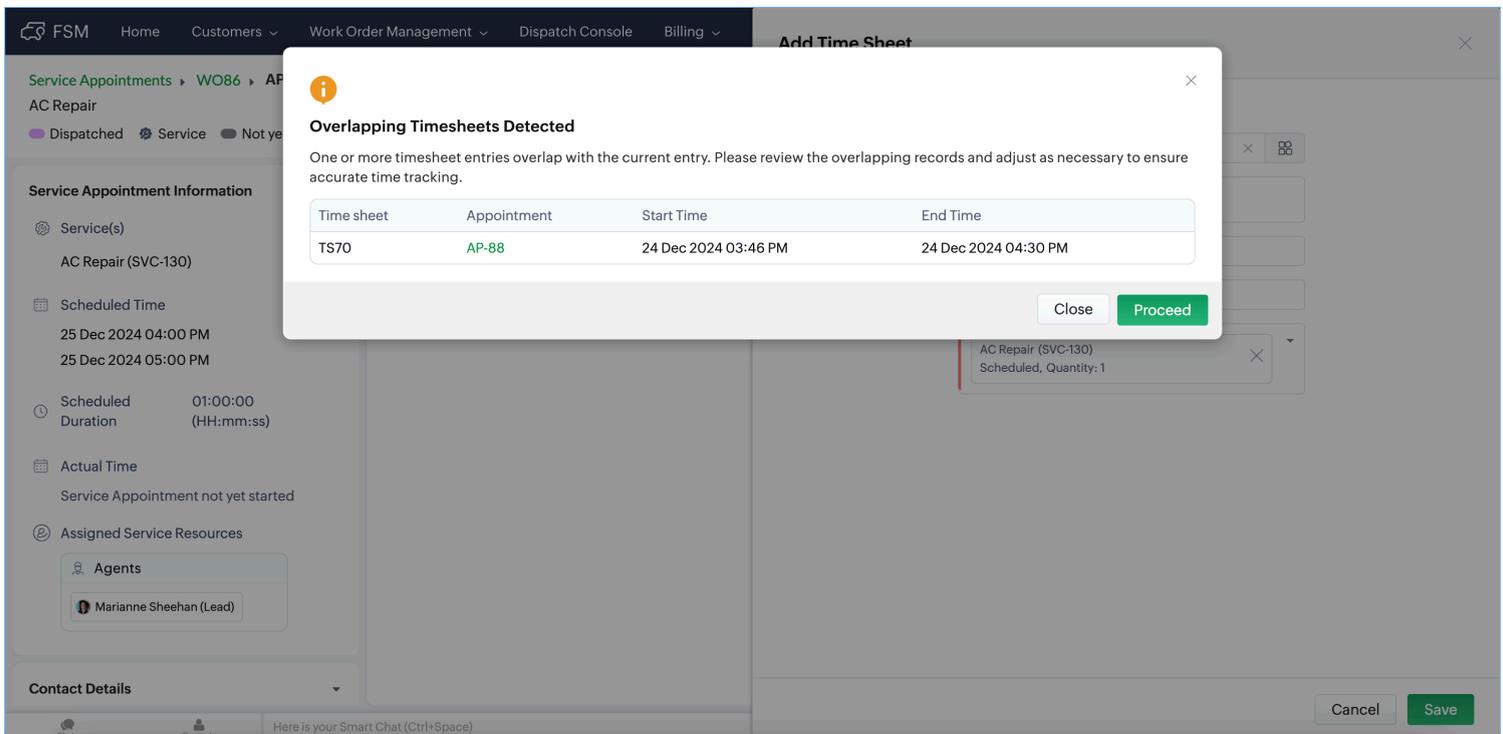
**Scenario II:** A technician may be performing routine preventative maintenance while being called for an emergency repair in the same facility.

## Simultaneous Tasks

- Continuing preventative tasks while managing the urgent repair request.
- Logging progress on both the preventative maintenance and the emergency task, ensuring that both are fully documented and resolved.

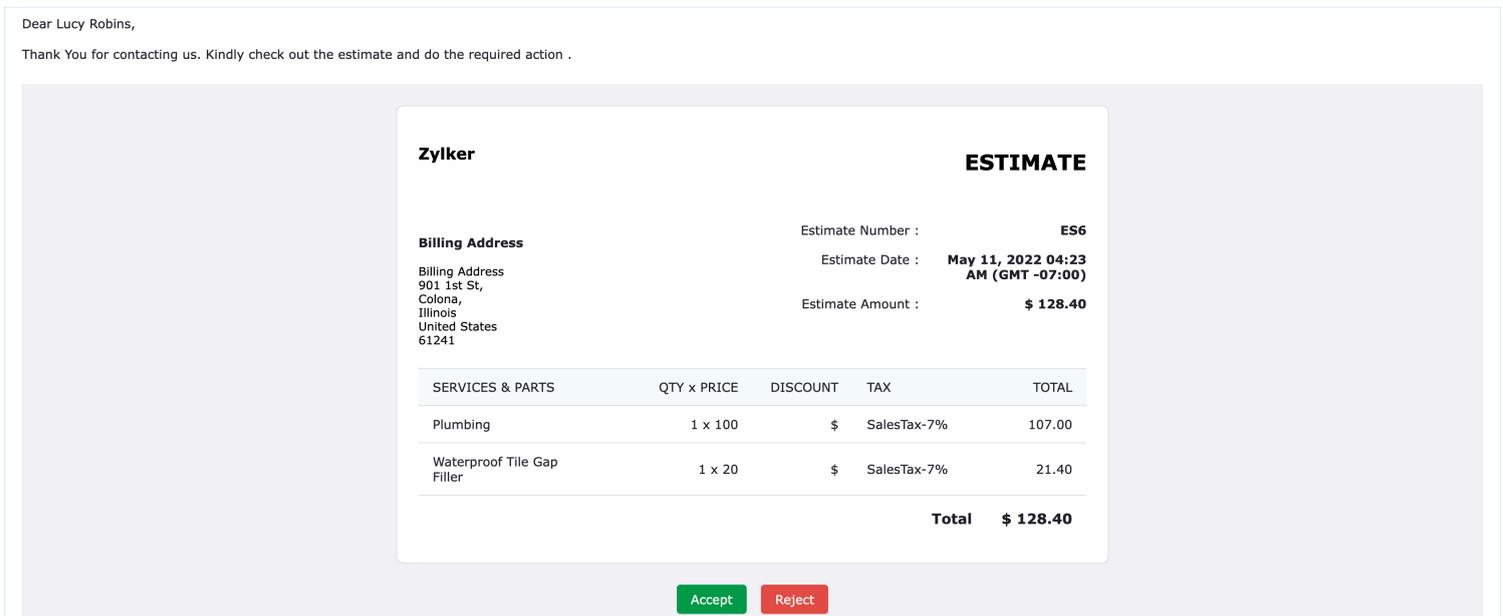
## How does this work?

In this case, the technician can work on two appointments, one for preventative maintenance (AP-88) and another for the repair (AP-89) with overlapping time sheet entries. The field technician needs to click **Proceed** to create overlapping time sheets.



## Estimate approval through email

When you enable **Estimate - Email Approval**, the estimate email sent to the customer will have the options to accept or reject it.



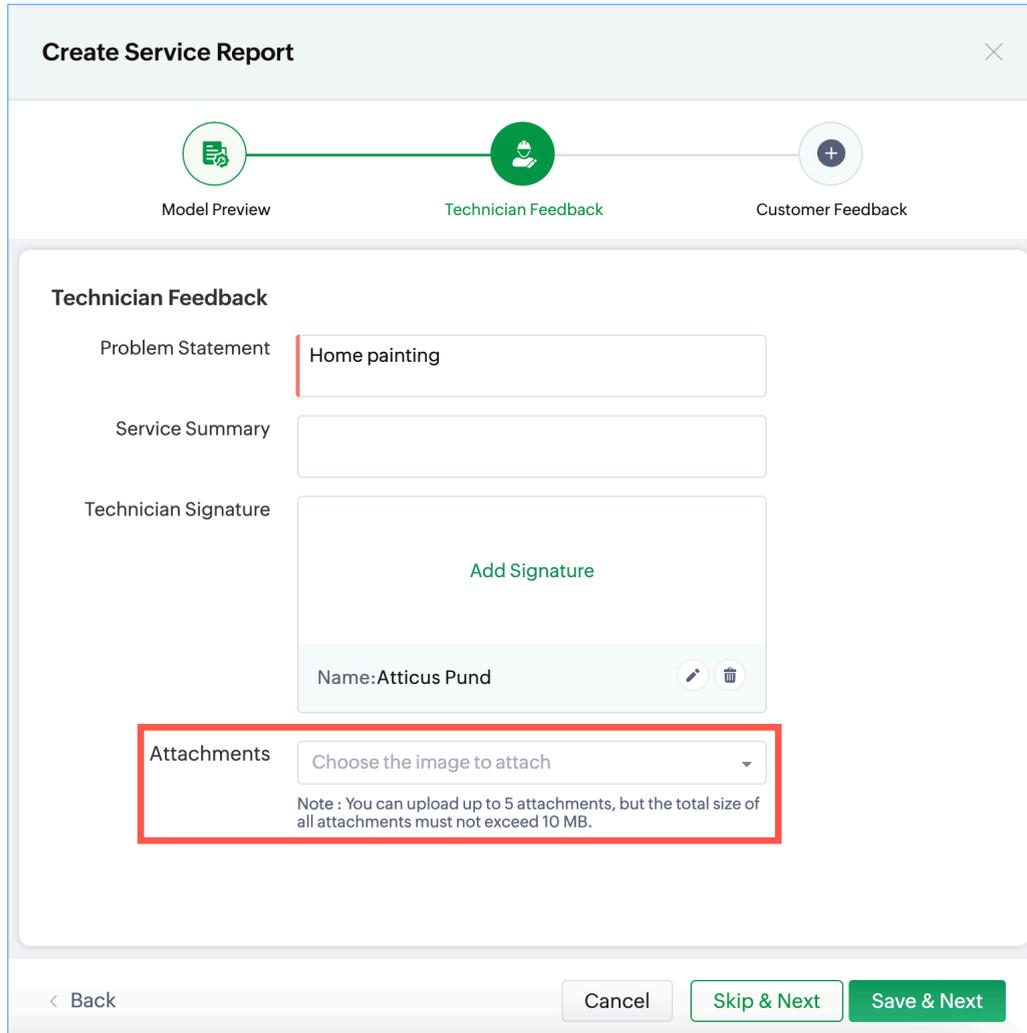
## Expiry Time for Email Approval Link

When you [send](#) the estimate to the customer, they will receive the estimate details with the options to accept or reject it. Using the transaction setting **Expiry Time for Email Approval Link**, you can set the duration until which these accept/reject options should remain valid. To set the duration, enable this transaction setting, enter a new value for **Set Expiry Time (Days)**, and click **Save** [✓]. You can set the duration from 1 to 30 days.

If this transaction setting is disabled, then the default of seven days will be considered as the expiry time.

## Hide Attachments During Service Report Creation

When you enable **Hide Attachments**, the **Attachments** field in the **Technician Feedback** step of the *Create/Edit Service Report* wizard will not be displayed.



The screenshot shows the 'Create Service Report' wizard with three steps: Model Preview, Technician Feedback, and Customer Feedback. The 'Technician Feedback' step is active. It contains the following fields:

- Problem Statement:** Home painting
- Service Summary:** (Empty text area)
- Technician Signature:** Add Signature (with Name: Atticus Pund and edit/delete icons)
- Attachments:** Choose the image to attach (dropdown menu, highlighted with a red box)

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

Navigation buttons at the bottom: < Back, Cancel, Skip & Next, Save & Next.

## Remove Customer Signature

Ordinarily, in Zoho FSM, the customer signature in the service report will be removed when you [edit](#) it. By default, the transaction setting **Remove Customer Signature** will be enabled. However, if you disable the transaction setting Remove Customer Signature, the customer signature in the service report will not be removed when you edit it.