



User Management

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Zoho FSM offers a multi-user environment by supporting different profiles. A [Profile](#) defines the set of permissions and accessibility within the application. There are five built-in profiles in the Zoho FSM application: **Administrator**, **Dispatcher**, **Call Center Agent**, **Field Agent**, and **Limited Field Agent**. While adding a user, the appropriate profile needs to be assigned to it. This way, you can regulate the access that your users have to the application's features and data.

 Available in Editions: **All Editions**

Creating Users

- ❗ - **Permission Required:** [User Management](#)
- Find out the Edition-specific limits for the [Number of Users](#).

To add users to the application:

1. Navigate to **Setup > Workforce > Users** and click **New User**
2. Enter a **First Name** and **Last Name**.
3. Enter an **Employee ID**, if present.
4. Enter the user's valid **Email** address that has not already been used to create an account.
An invitation will be sent to this email address. The invite link will be valid only for seven days.
5. Choose a [Profile](#).
6. Choose the [language](#).
7. Click **Save**.

Add User ✕

First Name

Last Name

Employee Id

Email

Profile

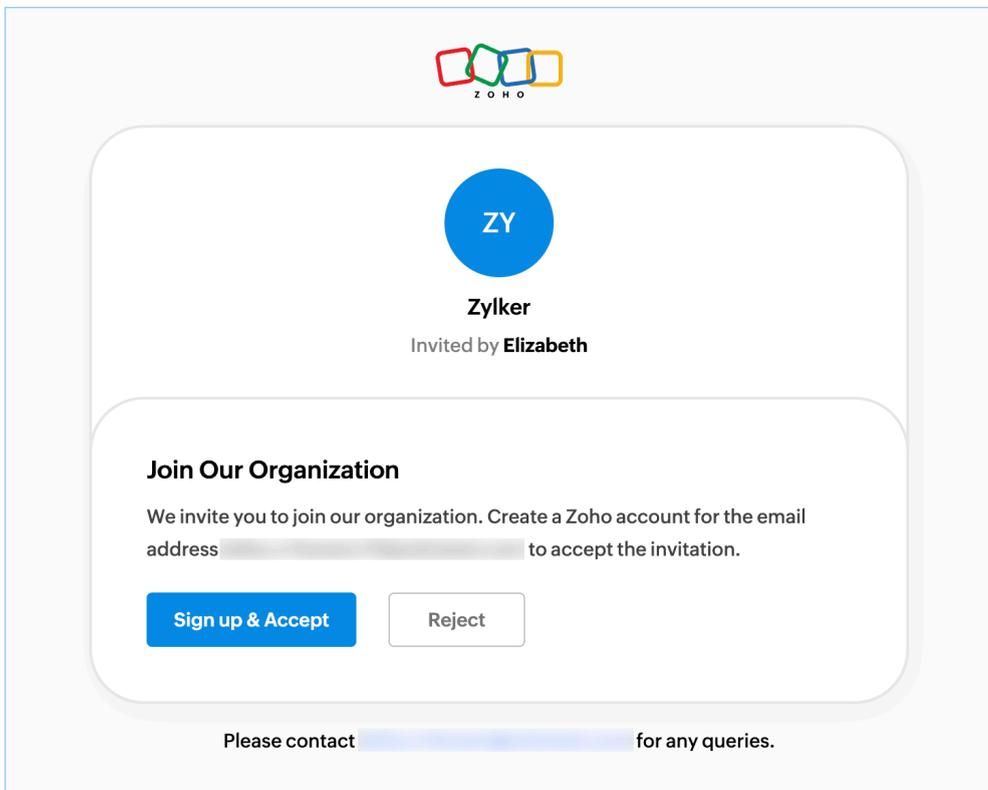
Language

Note: Some features are supported only in English language. We are working on it, and full support will be available in the upcoming updates.

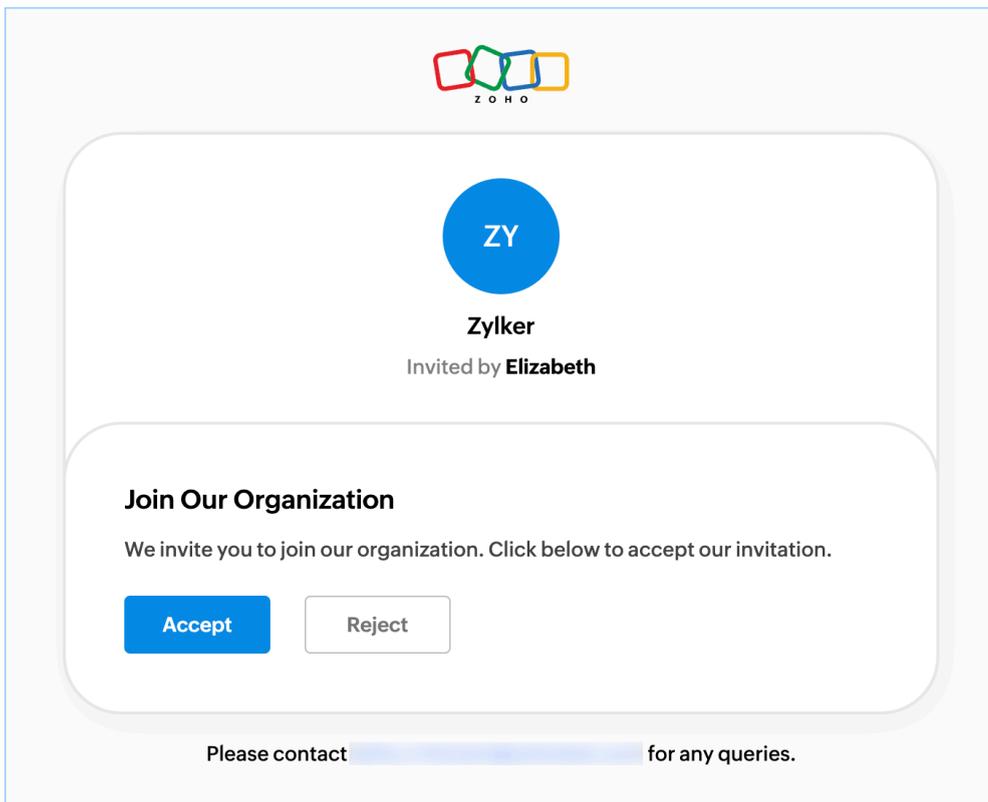
User joins Zoho FSM organization using invite link

When the user accesses the invite link, they will be presented with either of the below two options:

- If the invited user doesn't have a Zoho account, then they will be prompted to create a Zoho account and accept the invite.



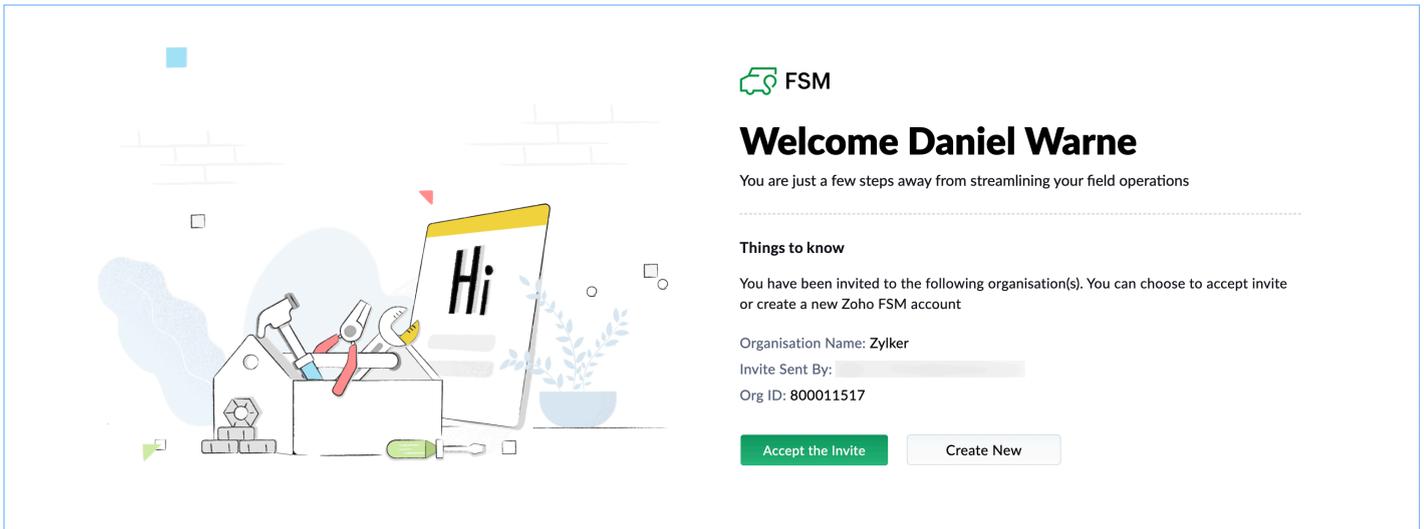
- If the invited user has a Zoho account, then they can directly accept the invite.



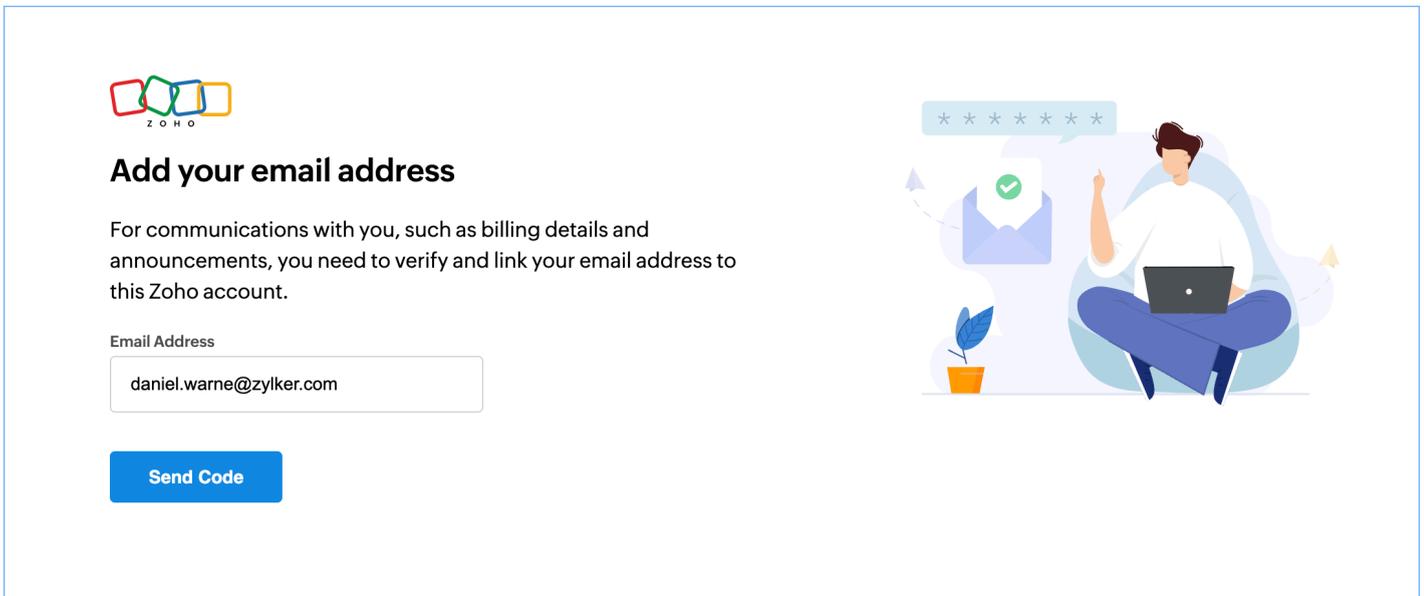
User joins Zoho FSM organization using application URL

If the invited user tries to join Zoho FSM by directly accessing the application URL (instead of using the invite link), and before their Zoho account has been confirmed, then they will be prompted to confirm their Zoho account. They need to do the following:

1. Click **Accept the Invite**.



2. Click **Send Code**.



3. Enter the code received and click **Verify**.



Add your email address

For communications with you, such as billing details and announcements, you need to verify and link your email address to this Zoho account.

A 7-digit verification code has been sent to your email address.
daniel.warne@zylker.com [Edit](#)

Verification Code

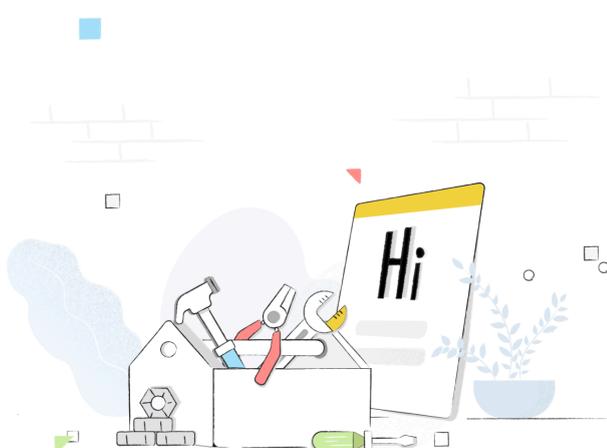
1	2	3	4	5	6	7
---	---	---	---	---	---	---

Resend in 44s

[Verify](#)



If an user receives invites from different Zoho FSM organizations, then they can choose the organization they want to join and accept that invite. They can also choose to create a new Zoho FSM organization. A maximum of five invites will be listed.



Welcome Daniel Warne

You are just a few steps away from streamlining your field operations

Things to know

You have been invited to the following organisation(s). You can choose to accept invite or create a new Zoho FSM account

- Organisation Name: Zylker
Invite Sent By:
Org ID: 800011517
- Organisation Name: Endeavour Pvt Ltd.
Invite Sent By:
Org ID: 776980321

[Accept the Invite](#) [Create New](#)

If the user is already part of a Zoho FSM organization, then they will not be able to accept the invitation from another Zoho FSM organization. If they need to join a new Zoho FSM organization, they must be deleted from the Zoho FSM organization they are currently part of.



Unable to join Endeavour Pvt Ltd.'s FSM account.

Because you are already a part of Zylker's FSM account, you will not be able to accept the invitation. Please ask the super admin (Elizabeth McCord) of Zylker's FSM account to delete you from that account. Feel free to reach out to us at support@zohofsm.com if you have any queries.

Assigning Territories

To assign a territory to an user:

1. Navigate to **Setup > Workforce > Users**.
2. Click the name of the user you want to add the territory to.
3. Click + **New Line** for **Territories** to add the territories for the user.

Select a [territory](#), and set the *Start Date Time* and the *End Date Time* and click **Save**.

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.

User Details ✕

Daniel Warne

████████████████████.com

Dispatcher

Edit
Deactivate
Delete

▼ **User Information**

First Name	Daniel
Last Name	Warne
Phone	--
Mobile	--

▼ **Address Information**

Street	--
City	--
State	--
Country	--
Zip Code	--

Territories + New Line

Name	Start Date	End Date	
Gosford	10 Oct 2022	31 Dec 2022	✎

[View Inactive Territories](#)

Crew

Name	Size	Is Active
Flooring Crew	2	true

📘 Points to remember

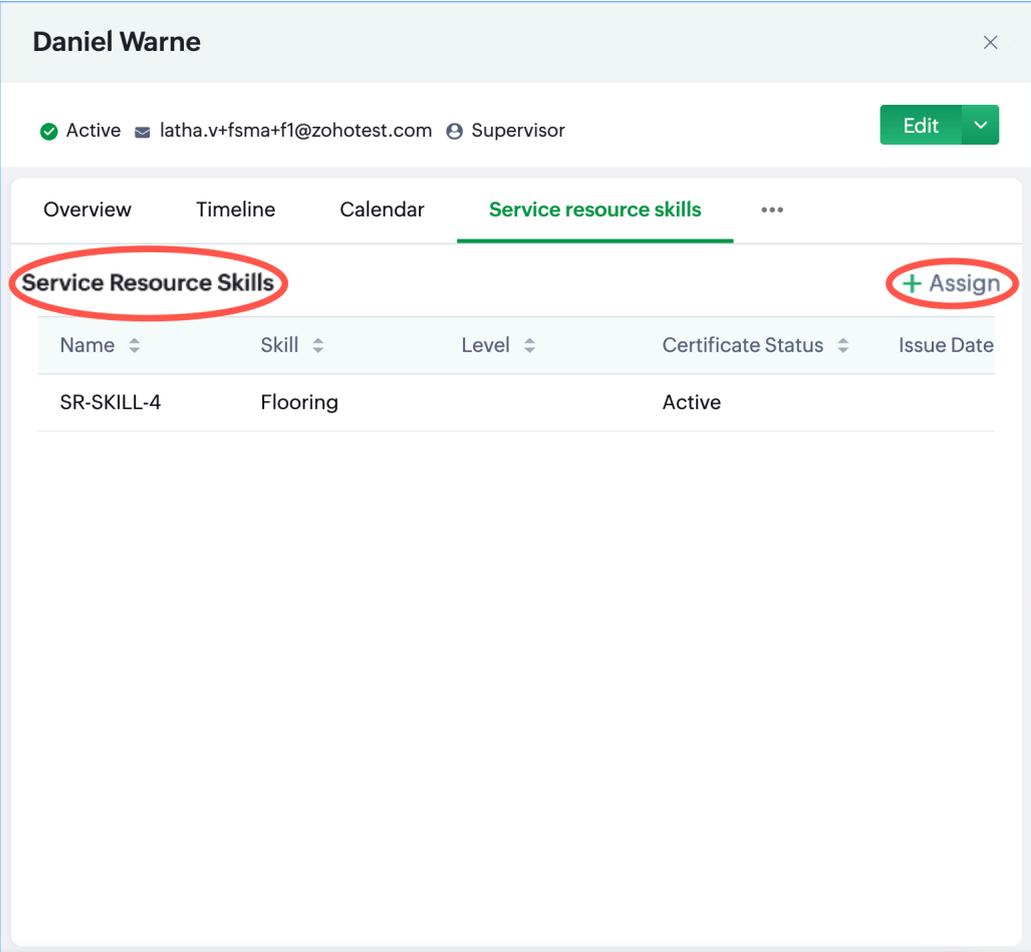
- Start Date** is a mandatory field.
- If an **End Date** is not provided for a territory, then the user will continue to be active in that territory until one is set.

Assigning Skills

To assign a skill to an user:

1. Navigate to **Setup > Workforce > Users**.
2. Click the name of the user you want to add the skill to.
3. Click **+ Assign** for **Service Resource Skills** to add the [skills](#) for the user. Enter the necessary details and click **Create**.

Ensure that you create [Skills](#) before you attempt to assign it to a user.



The screenshot shows the user profile for Daniel Warne. At the top, there is a header with the name 'Daniel Warne' and a close button. Below this, there is a status bar indicating the user is 'Active', with an email address 'latha.v+fsma+f1@zohotest.com' and a role of 'Supervisor'. An 'Edit' button is visible on the right. The main content area has tabs for 'Overview', 'Timeline', 'Calendar', and 'Service resource skills'. The 'Service resource skills' tab is selected. Below the tabs, there is a section titled 'Service Resource Skills' with a '+ Assign' button to its right. A table below this section lists skills with columns for Name, Skill, Level, Certificate Status, and Issue Date. One skill is listed: SR-SKILL-4, Flooring, Level (blank), Active, and Issue Date (blank).

Name	Skill	Level	Certificate Status	Issue Date
SR-SKILL-4	Flooring		Active	

Assign Crews

Details of any [crew](#) the user is part of will be listed.

User Details
✕

▼ **User Information**

First Name	Daniel
Last Name	Warne
Phone	--
Mobile	--

▼ **Address Information**

Street	--
City	--
State	--
Country	--
Zip Code	--

Territories + New Line

Name	Start Date	End Date
Gosford	10 Oct 2022	31 Dec 2022

[View Inactive Territories](#)

Crew

Name	Size	Is Active
Flooring Crew	2	true

Skills + New line

Skill	Rating
Flooring	4

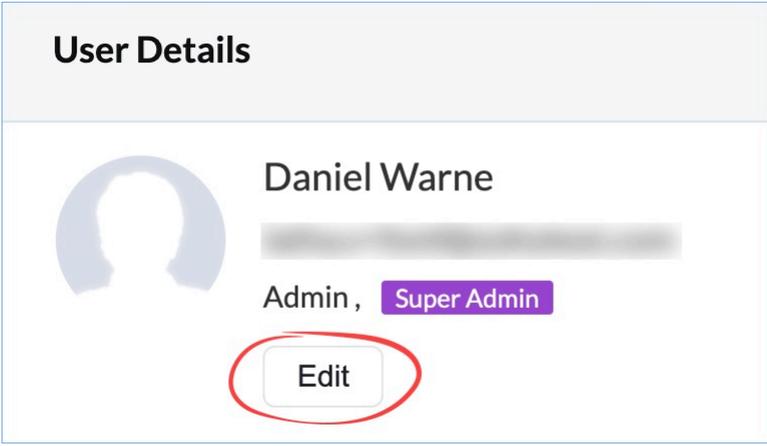
Managing Users

You can perform the following actions on users:

1. **Edit:** The user details can be modified including the profile of the user.
2. **Reinvite:** The email invite to provide access to the FSM account can be re-sent using this option. This option will be available for users with the status **Unconfirmed**.
3. **Deactivate:** The access of the user can be revoked and no tasks can be assigned to the user unless activated again. When deactivated, the status of the user changes to **Inactive**.
4. **Delete:** The access of the user can be revoked and no tasks can be assigned to the user. Unlike the deactivated user, a **Deleted** user cannot be reactivated.

Options available for the Super Admin

User Details



Daniel Warne

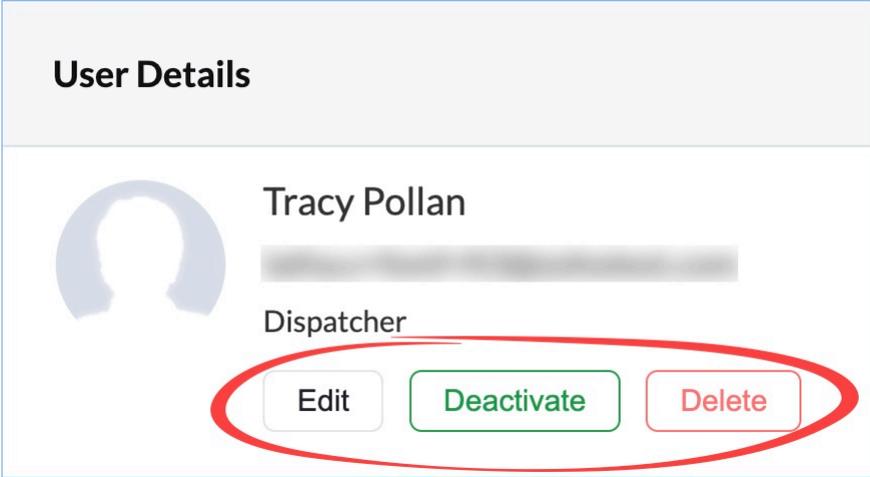
Admin, **Super Admin**

Edit

The user profile card for Daniel Warne shows his name, a blurred email address, and roles 'Admin' and 'Super Admin'. A red oval highlights the 'Edit' button.

Options available for Active users

User Details



Tracy Pollan

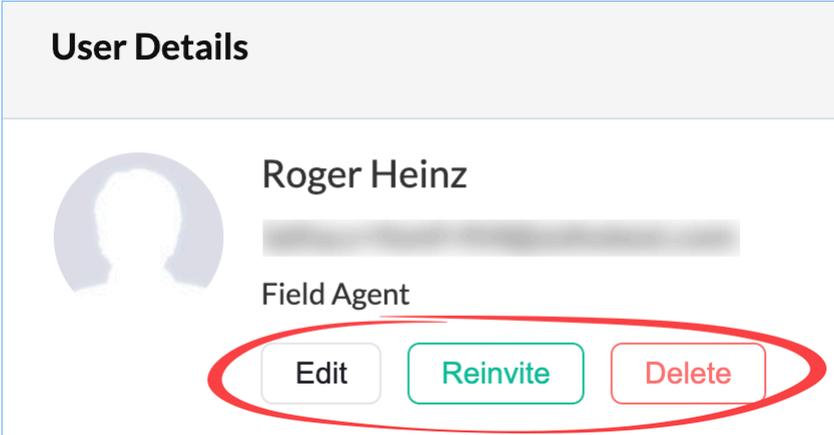
Dispatcher

Edit **Deactivate** **Delete**

The user profile card for Tracy Pollan shows her name, a blurred email address, and the role 'Dispatcher'. A red oval highlights the 'Edit', 'Deactivate', and 'Delete' buttons.

Options available for Unconfirmed users

User Details



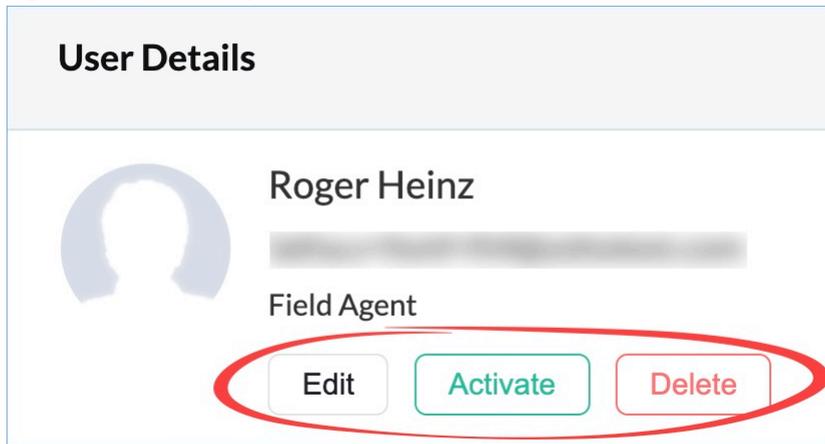
Roger Heinz

Field Agent

Edit **Reinvite** **Delete**

The user profile card for Roger Heinz shows his name, a blurred email address, and the role 'Field Agent'. A red oval highlights the 'Edit', 'Reinvite', and 'Delete' buttons.

Options available for Inactive users



i Points to remember

- In order to change the profile, deactivate, or delete a user with the profile Field Agent, any appointments assigned to the user should be reassigned.

Deactivating Users

You can temporarily remove a user's access to the application by deactivating them. To deactivate a user:

1. Navigate to **Setup** > **Workforce** > **Users** and select the user you want to deactivate.
2. In the *User Details* overlay, click **Deactivate**.

User Details

Tracy Pollan
[Redacted] com
Dispatcher

Edit Deactivate Delete

▼ User Information

First Name	Tracy
Last Name	Pollan
Date of Birth	—
Phone	—
Mobile	—
Website	—
Fax	—

▼ Address Information

Street	—
City	—
State	—
Country	—
Zip Code	—

Territories + New Line

Name	Start Date	End Date
Fillmore	03 Dec 2021	

View Inactive Territories

Crew

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

i The Super Admin of an organization cannot be deactivated.

Deleting Users

To delete a user:

1. Navigate to **Setup > Workforce > Users** and select the user you want to delete.
2. In the *Delete User* overlay, click **Delete**.

When you delete a user, you can transfer records and roles associated with it to another user. Select the user you want to transfer the records to from the dropdown **Transfer Ownership to** and click **Delete** to proceed.

Delete User?

Tracy Pollan - I [REDACTED].com

To delete, please transfer the records owned by this user to a new user.

Transfer Ownership to *

Select

Note

Records owned by this user will be transferred to the new user. (This applies to records like Requests, Estimates, Work Orders, Service Appointments which are in Inprogress state, and the records that are closed or inactive will have no impact or change)

Crews owned or lead by this user will be transferred to the new user

If the user is a field technician, Timesheets, Trips, Location tracking will be closed or stopped automatically.

Cancel

Delete

You can transfer the following:

- Record ownership: All open records associated with the user. The table below lists the modules and the statuses of the records that will be considered during the transfer:

Module	Status
Requests	New, Estimate Created, Estimate Rejected, Work In Progress, Completed
Work Orders	New, In Progress, Scheduled Appointment, Dispatched
Estimates	New, Approved, Waiting For Approval, Converted to Work Order
Service Appointments	New, Scheduled, Dispatched, In Progress, Completed, Payment Due, Invoice Generated

- Role of a Crew Lead: If the user is the lead of any Crews, then this role will be transferred to the new user

Additionally, any Trips, or Time Sheets associated with the user will be forcibly terminated and the user will be logged out of the mobile app.

i The Super Admin of an organization cannot be deleted.

User Status

A user can have one of the following statuses:

Active: A user who currently has access to the application based on their permission. After a user is [created](#), and the invite accepted, the status of the user will be active.

Deleted: A user who has been removed from the application.

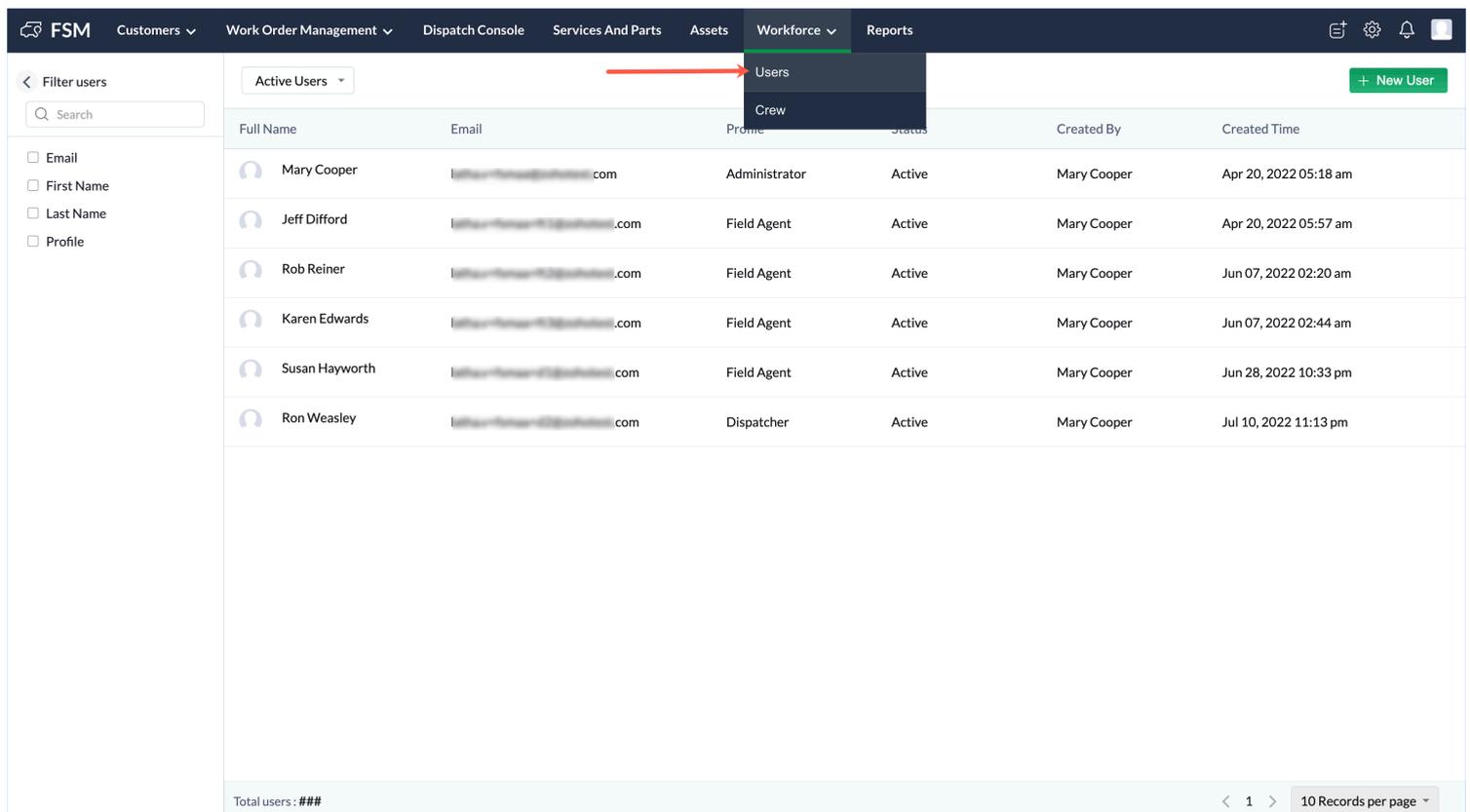
Inactive: A user who has been deactivated.

Unconfirmed: A newly created user will be in this state unless the user accepts the invite sent to the its Email address provided during creation.

You can filter users based on the status.

Users Menu

The details of the users can also be accessed from the **Users** menu under the **Workforce** tab.



The screenshot shows the FSM Workforce Users interface. At the top, there is a navigation bar with tabs for Customers, Work Order Management, Dispatch Console, Services And Parts, Assets, Workforce, and Reports. The Workforce tab is active, and a dropdown menu is open, showing 'Users' and 'Crew'. A red arrow points to the 'Users' option. Below the navigation bar, there is a 'Filter users' section with a search box and checkboxes for Email, First Name, Last Name, and Profile. The main area displays a table of users with the following columns: Full Name, Email, Role, Status, Created By, and Created Time. The table contains seven rows of user data. At the bottom, there is a footer with 'Total users: ###' and a pagination control showing '1' and '10 Records per page'.

Full Name	Email	Role	Status	Created By	Created Time
Mary Cooper	[redacted].com	Administrator	Active	Mary Cooper	Apr 20, 2022 05:18 am
Jeff Difford	[redacted].com	Field Agent	Active	Mary Cooper	Apr 20, 2022 05:57 am
Rob Reiner	[redacted].com	Field Agent	Active	Mary Cooper	Jun 07, 2022 02:20 am
Karen Edwards	[redacted].com	Field Agent	Active	Mary Cooper	Jun 07, 2022 02:44 am
Susan Hayworth	[redacted].com	Field Agent	Active	Mary Cooper	Jun 28, 2022 10:33 pm
Ron Weasley	[redacted].com	Dispatcher	Active	Mary Cooper	Jul 10, 2022 11:13 pm

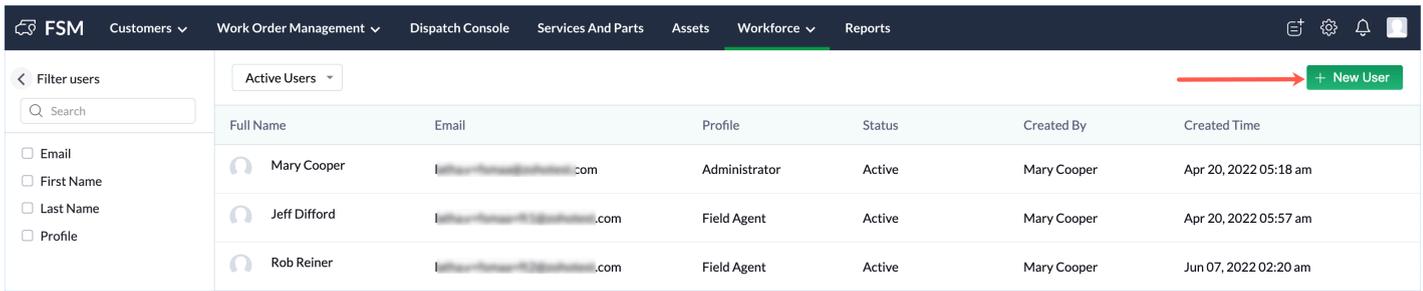
Manage Users

You can perform the following actions on users:

Create Users

To create a user:

1. Select **Users** from the **Workforce** menu and click **Create**.

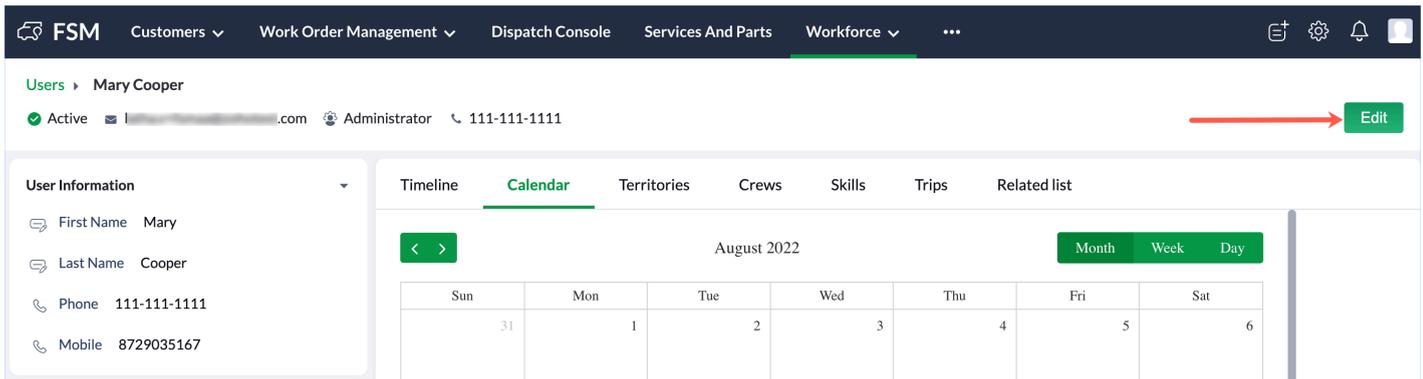


Refer to [this](#) section for the steps to create an user.

Edit Users

To edit an user:

1. Select **Users** from the **Workforce** menu and click the user you want to edit. In the *User Details* page, click **Edit**.

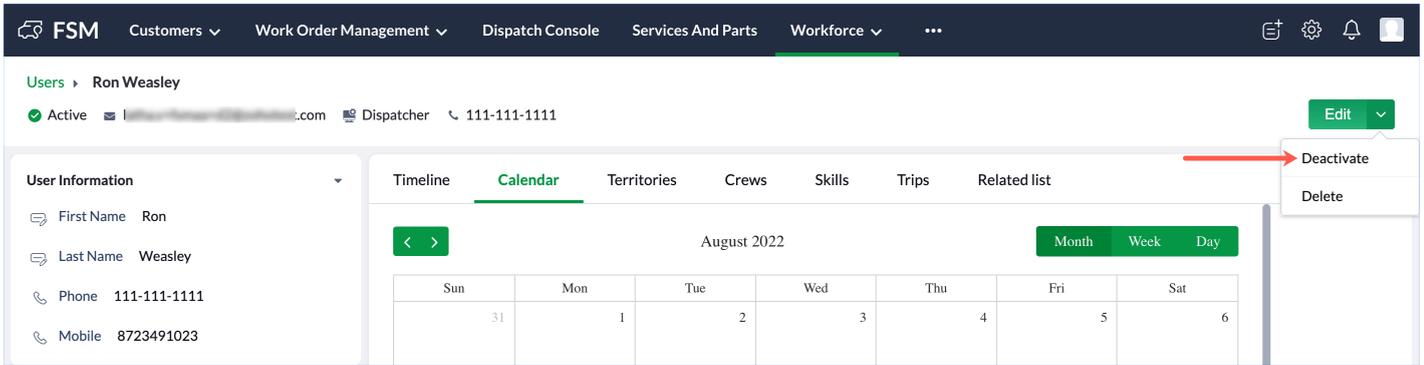


2. Click **Save** after making the changes.

Deactivate Users

To deactivate a user:

1. Select **Users** from the **Workforce** menu and click the user you want to deactivate. In the *User Details* page, click **Deactivate**.

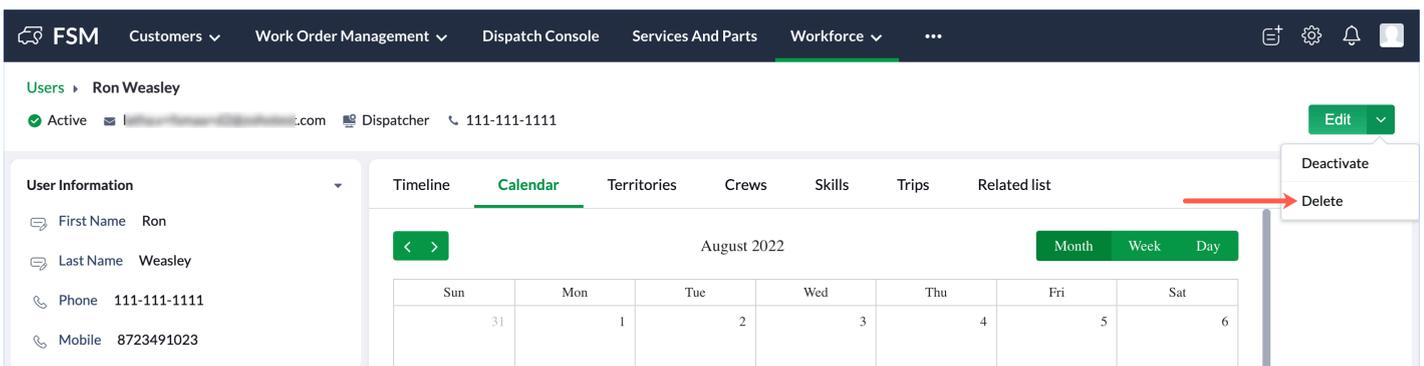


Refer to [this](#) section for details on deactivating an user.

Delete Users

To delete a user:

1. Select **Users** from the **Workforce** menu and click the user you want to delete. In the *User Details* page, click **Delete**.



Refer to [this](#) section for details on deleting an user.

View User Details

On the *User Details* page, the following details about an user will be displayed under the following sections:

Timeline

Changes to the user can be tracked using its [timeline](#).

FSM Customers Work Order Management Dispatch Console Services And Parts Workforce

Users > Mary Cooper

Active Administrator 111-111-1111 Edit

User Information
First Name: Mary
Last Name: Cooper
Phone: 111-111-1111
Mobile: 8729035167

Address
3685 Eureka Way,
Redding,
California,
United States,
96001.

Territories
Zylker
Start Date: Apr 20, 2022
End Date: -
Colona
Start Date: Apr 29, 2022
End Date: -

Crews
Extermination Crew
Start Date: Jun 07, 2022
End Date: Jun 07, 2022

Timeline Calendar Territories Crews Skills Trips Related list

All the actions and events related to this Service Resource are recorded in a chronological order. All Time

No updates available. Try changing the filter(s).

Calendar

The appointments assigned to the user can be viewed in the calendar with Monthly, Weekly, or Daily views. Hover over an entry to view the details. Further details of the appointment can be viewed by clicking on the entry.

Users > Marianne Sheehan

Active | marianne.s@zylker.com | Administrator

Timeline **Calendar** Territories Crew Skills Trips Related list

Month Week Day List

Filter by:

- Service Appointments
- Holiday
- Time Off

WO12 / AP-14
Renovation works
Completed Not yet Invoiced

Service Resources
Marianne SheehanLori Ross

Actual Time
Apr 27, 2023 05:55 PM
May 02, 2023 11:32 AM

Scheduled Time
Apr 27, 2023 06:00 PM
Apr 27, 2023 07:00 PM

Contact Lucy Robins

Service Address Service Address, 2935 S 6th St, Springfield, Illinois, United States, 62703

You can also see all the entries of a day in the List view.

Users > Marianne Sheehan

Active | marianne.s@zylker.com | Administrator

Timeline Calendar Territories Crew Skills Trips Related list

Month Week Day **List**

Filter by:

- Service Appointments
- Holiday
- Time Off

Thursday

11:37am - 12:00pm AP-10 / TS8

12:01pm - 12:03pm AP-10 / TS10

12:10pm AP-10 / TS12

12:15pm - 02:23pm AP-10 / TS14

02:25pm - 03:11pm

03:13pm - 05:38pm

05:55pm - 11:59pm

WO9 / AP-11
Renovation works
Completed Not yet Invoiced

Service Resources
Marianne SheehanLori Ross

Actual Time
Apr 27, 2023 02:25 PM
Apr 27, 2023 03:11 PM

Scheduled Time
Apr 27, 2023 02:30 PM
Apr 27, 2023 03:30 PM

Contact Lucy Robins

Service Address Service Address, 2935 S 6th St, Springfield, Illinois, United States, 62703

You can do the following in the service calendar:

- Create appointment
- Reschedule through drag and drop

Create Appointment

1. Click on the point in the calendar that corresponds to the day or time for which you want to create the appointment.
2. In the *Create Appointment* popup, choose the work order for which you want to create the appointment.
3. In the *Create Appointment* popup, the following details will be populated, which you can change if required.

Click **Schedule** or **Schedule and Dispatch** to continue.

- a. Service
- b. Summary
- c. Scheduled Start/End Date Time
- d. Service Resource

You can create appointments from the Month, Week, and Day views.

The screenshot shows the FSM user management interface for Edward Cormoran. The main area displays a calendar for November 2022. The calendar has tabs for Timeline, Calendar, Territories, Crews, Skills, Trips, and Related list. The Calendar tab is active, showing a monthly view. The calendar grid shows dates from 30 to 10. Two appointments are visible: 'AP-1 / 06:30am' on Nov 14 and 'AP-2 / 09:00am' on Nov 10. The left sidebar shows user information, address, territories, crews, and skills. The bottom of the interface has a chat bar with the text 'Here is your Smart Chat (Ctrl+Space)'.

Reschedule Appointment

From the service resource calendar, you can reschedule an appointment in the following ways:

1. Drag and drop an appointment to a different date or time
2. Resize the appointment

You can reschedule an appointment by dragging and dropping it to a different date or time. In the *Schedule Appointment* popup, the details are prefilled. Make the necessary changes and click **Schedule Appointment**.

You can reschedule appointments from the Month, Week, and Day views.

Users ▸ Edward Cormoran

Active   edward.cormoran@zylker.com  Administrator

User Information ▾

 First Name -- Last Name Edward Cormoran Phone -- Mobile --

Address ▾

No Address Found

Territories ▾

 Zylker
Start Date: Nov 09, 2022
End Date: --

Crews ▾

No Crew Found

Skills ▾

No Skills Found

Timeline

Calendar

Territories

Crews

Skills

Trips

Related list

< November 2022 >							Month	Week	Day
Sun	Mon	Tue	Wed	Thu	Fri	Sat			
30	31	1	2	3	4	5			
6	7	8	9	10	11	12	AP-1/06:30am		
13	14	15	16	17	18	19			
20	21	22	23	24	25	26			
27	28	29	30	1	2	3			
4	5	6	7	8	9	10			

You can also reschedule an appointment by resizing the appointment. Move your cursor to the bottom edge of the service appointment and when the cursor changes to a downward arrow, resize it to the duration you want for the service appointment. In the *Schedule Appointment* popup, the details are prefilled. Make the necessary changes and click **Schedule Appointment**.

You can resize and reschedule appointments only from the Week, and Day views.

Users > Edward Cormoran

Active edward.cormoran@zylker.com Administrator

User Information

First Name --
 Last Name Edward Cormoran
 Phone --
 Mobile --

Address

No Address Found

Territories

Zylker
 Start Date : Nov 09, 2022
 End Date : -

Crews

No Crew Found

Skills

No Skills Found

Timeline Calendar Territories Crews Skills Trips Related list

November 2022							Month	Week	Day
Sun	Mon	Tue	Wed	Thu	Fri	Sat			
30	31	1	2	3	4	5			
6	7	8	9	10	11	12			
13	14 AP-1 / 06:30am	15	16	17	18	19			
20	21	22	23	24	25	26			
27	28	29	30	1	2	3			
4	5	6	7	8	9	10			

Tip: Click on the date in the Month view to go to the Day view.

Users > Edward Cormoran

Active edward.cormoran@zylker.com Administrator

User Information

First Name --
 Last Name Edward Cormoran
 Phone --
 Mobile --

Address

No Address Found

Territories

Zylker
 Start Date : Nov 09, 2022
 End Date :-

Crews

No Crew Found

Skills

No Skills Found

Timeline **Calendar** Territories Crews Skills Trips Related list

November 2022							Month	Week	Day
Sun	Mon	Tue	Wed	Thu	Fri	Sat			
30	31	1	2	3	4	5			
6	7	8	9	10	11	12			
13	14	15	16	17	18	19			
	AP-1/06:30am								
20	21	22	23	24	25	26			
27	28	29	30	1	2	3			
4	5	6	7	8	9	10			

Service Appointments

The service appointments assigned to the user as an individual resource and when part of a crew will be listed here.

FSM Home Customers Work Order Management Dispatch Console Services And Parts Workforce Reports Free Edition Upgrade

Users > Mary Cooper

Active Administrator 111-111-1111 Edit

User Information

- First Name: Mary
- Last Name: Cooper
- Phone: 111-111-1111
- Mobile: 8729035167

Address

3685 Eureka Way, Redding, California, United States, 96001.

Territories

- Zylker
Start Date: 20 Apr 2022
End Date: -
- Colona
Start Date: 29 Apr 2022
End Date: -

Timeline Calendar **Service appointments** Territories Crew Skills Related list

Service Appointments

Service Resource Crew

Name	Status	Total	Work Order	Scheduled Start Date Time	Scheduled End Date Time
AP-81	Completed	\$ 1,062.50	WO50	22 Nov 2023 03:30 PM	22 Nov 2023 04:30 PM
AP-80	Completed	\$ 53.50	WO58	02 Feb 2024 10:00 PM	02 Feb 2024 10:01 PM
AP-72	Completed	\$ 53.50	WO54	11 May 2023 04:00 PM	11 May 2023 05:00 PM
AP-58	Completed	\$ 642.00	WO43	02 Mar 2023 04:00 PM	02 Mar 2023 05:00 PM
AP-45	Completed	\$ 607.00	WO34	04 Sep 2022 01:05 PM	04 Sep 2022 09:50 PM

Territories

The territories assigned to the user will be listed here. Click + **Create** to add the territories for the user. Select a [Territory](#), and set the **Start Date Time** and the **End Date Time** and click **Save**.

FSM Customers Work Order Management Dispatch Console Services And Parts Workforce

Users > Mary Cooper

Active Administrator 111-111-1111 Edit

User Information

- First Name: Mary
- Last Name: Cooper
- Phone: 111-111-1111
- Mobile: 8729035167

Address

3685 Eureka Way, Redding, California, United States, 96001.

Territories

- Zylker
Start Date: Apr 20, 2022
End Date: -
- Colona
Start Date: Apr 29, 2022
End Date: -

Crews

- Extermination Crew
Start Date: Jun 07, 2022
End Date: Jun 07, 2022

Timeline Calendar **Territories** Crews Skills Trips Related list

Territories

+ Create

Territory	Start Date Time	End Date Time
Colona	Apr 29, 2022 12:00 AM (GMT-07:00)	
Zylker	Apr 20, 2022 05:20 AM (GMT-07:00)	

Crews

Details of the [crew](#) the user is part of will be listed here.

The screenshot shows the FSM user management interface for user Mary Cooper. The 'Crews' tab is selected and highlighted with a red circle. The interface includes a sidebar with user information, address, territories, and crews. The main content area displays a table of crews assigned to the user.

User Information

- First Name: Mary
- Last Name: Cooper
- Phone: 111-111-1111
- Mobile: 8729035167

Address

3685 Eureka Way,
Redding,
California,
United States,
96001.

Territories

- Zylker
Start Date: Apr 20, 2022
End Date: -
- Colona
Start Date: Apr 29, 2022
End Date: -

Crews

- Extermination Crew
Start Date: Jun 07, 2022
End Date: Jun 07, 2022

Crew	Start Date Time	End Date Time
Extermination Crew	Jun 07, 2022 12:00 AM (GMT -07:00)	Jun 07, 2022 11:59 PM (GMT -07:00)

Service Resource Skills

Click + **Assign** to add the [skills](#) for the user. Enter the necessary details and click **Create**. Ensure that you create the [skills](#) before you attempt to assign them to an user. Hover over an entry and click the **Edit** [] icon to make changes.

FSM Home Customers Work Order Management Dispatch Console Billing Services And Parts Workforce Professional Trial Upgrade

Users > Mary Cooper
Active Administrator 111-111-1111 Edit

User Information
 First Name: Mary
 Last Name: Cooper
 Employee Id: --
 Phone: 111-111-1111
 Mobile: 8729035167
 Language: English - United States

Address
 3685 Eureka Way,
 Redding,
 California,
 United States,
 96001.

Territories
 Zylker
 Start Date: 20 Apr 2022
 End Date: -

Timeline Calendar Service appointments Territories Crew **Service resource skills** Trips ...

Service Resource Skills + Assign

Name	Skill	Level	Certificate Status	Issue Date	Expiry Date
SR-SKILL-2	AC Repair	80	Active	25 Oct 2024	25 Oct 2025

Trips

The details of the [trips](#) undertaken by the user will be listed here. You can view the trip on the map.

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

Users > Mary Cooper
Active Administrator 111-111-1111 Edit

User Information
 First Name: Mary
 Last Name: Cooper
 Phone: 111-111-1111
 Mobile: 8729035167

Address
 3685 Eureka Way,
 Redding,
 California,
 United States,
 96001.

Territories
 Zylker
 Start Date: Apr 20, 2022
 End Date: -
 Colona
 Start Date: Apr 29, 2022
 End Date: -

Crews
 Extermination Crew
 Start Date: Jun 07, 2022
 End Date: Jun 07, 2022
 Plumbing

Timeline Calendar Territories Crews Skills **Trips** Related list

Trips

Appointment	Trip Name	Start Time	End Time	Distance Travelled	
AP-32	Trip7	Jul 27, 2022 03:16 AM (GMT -07:00)	Jul 28, 2022 03:23 AM (GMT -07:00)	0.04 mi	
AP-32	Trip5	Jul 27, 2022 03:08 AM (GMT -07:00)	Jul 27, 2022 03:09 AM (GMT -07:00)	0.00 mi	
AP-32	Trip6	Jul 27, 2022 03:09 AM (GMT -07:00)	Jul 27, 2022 03:16 AM (GMT -07:00)	0.00 mi	
AP-5	Trip2	May 20, 2022 12:21 AM (GMT -07:00)	May 20, 2022 12:23 AM (GMT -07:00)	0.00 mi	
AP-4	Trip1	Apr 29, 2022 04:44 AM (GMT -07:00)	Apr 29, 2022 04:45 AM (GMT -07:00)	0.00 mi	

Click on [] to view the trip on the map.

FSM Customers Work Order Management Dispatch Console Services And Parts Assets

Users > Mary Cooper

Active Administrator 111-111-1111

User Information

First Name: Mary
 Last Name: Cooper
 Phone: 111-111-1111
 Mobile: 8729035167

Address

3685 Eureka Way, Redding, California, United States, 96001.

Territories

Zylker
 Start Date: Apr 20, 2022
 End Date: -

Colona
 Start Date: Apr 29, 2022
 End Date: -

Crews

Trip7

Trip Information

Service: Trip7
 Service Resource: Mary Cooper
 Time info:
 Jul 27, 2022 03:16 AM (GMT -07:00)
 Jul 28, 2022 03:23 AM (GMT -07:00)

Duration: 1 Day(S) 7 min
 Distace Travelled: 0.04 mi

Related List

The details of the [Time Off](#) taken by the user will be listed here. The details of the user's [check-in](#) and check-out details will be listed under the **Attendance** section.

FSM Customers Work Order Management Dispatch Console Services And Parts Workforce

Users > Mary Cooper

Active Administrator 111-111-1111 Edit

User Information

First Name: Mary
 Last Name: Cooper
 Phone: 111-111-1111
 Mobile: 8729035167

Address

3685 Eureka Way, Redding, California, United States, 96001.

Territories

Zylker
 Start Date: Apr 20, 2022
 End Date: -

Colona
 Start Date: Apr 29, 2022
 End Date: -

Crews

Extermination Crew
 Start Date: Jun 07, 2022
 End Date: Jun 07, 2022

Timeline Calendar Territories Crews Skills Trips Related list

Time Off

TimeOff Name	Start Date Time	End Date Time	Reason	Time Off Type
AB-1	Aug 11, 2022 11:30 AM (GMT -07:00)	Aug 12, 2022 11:29 AM (GMT -07:00)	Leave	Date

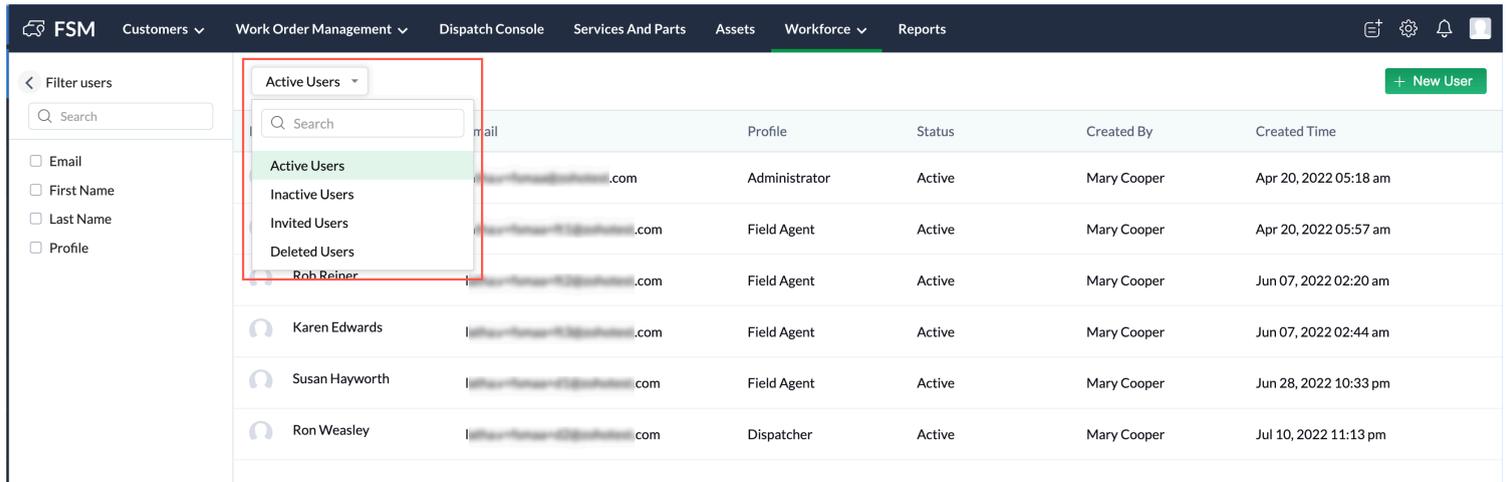
Attendance

UserLocationLogs Name	Check In Time	Check Out Time
Log-26	Jul 26, 2022 11:17 PM (GMT -07:00)	
Log-24	Jul 06, 2022 11:23 PM (GMT -07:00)	Jul 06, 2022 11:34 PM (GMT -07:00)
Log-22	Jul 05, 2022 10:45 PM (GMT -07:00)	Jul 06, 2022 06:06 AM (GMT -07:00)
Log-20	Jul 05, 2022 02:06 AM (GMT -07:00)	Jul 05, 2022 02:17 AM (GMT -07:00)
Log-17	Jun 16, 2022 02:12 AM (GMT -07:00)	Jun 16, 2022 02:14 AM (GMT -07:00)

< 1 >

Filter Users

You can filter the users based on their [status](#).

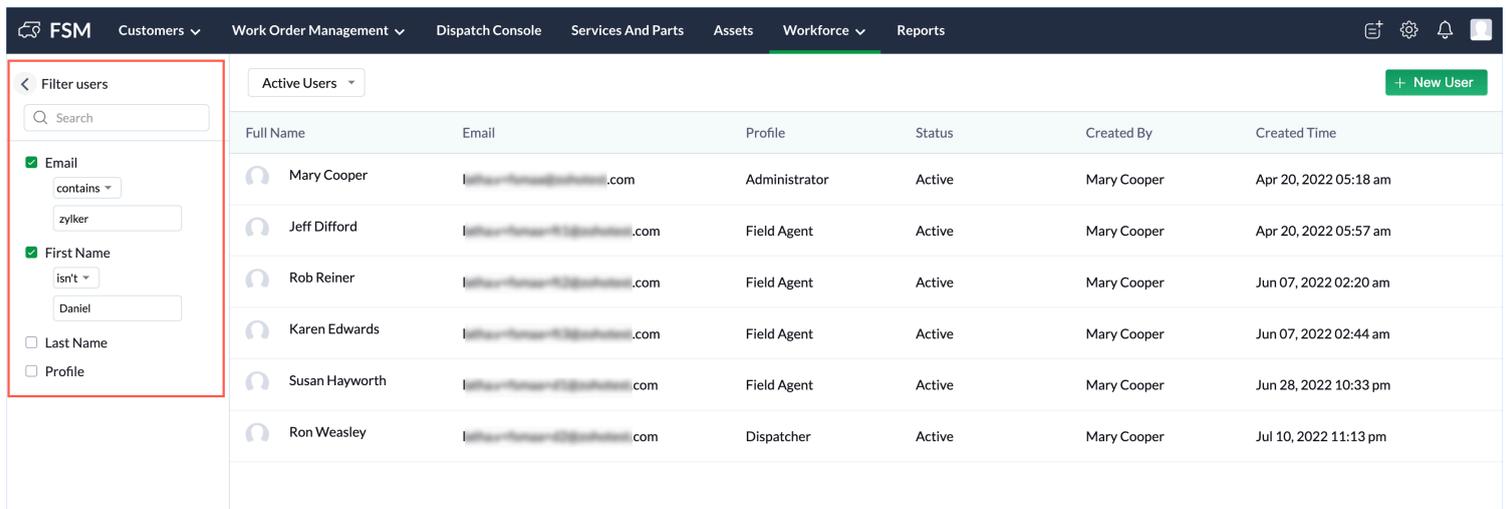


The screenshot shows the FSM Workforce management interface. The top navigation bar includes 'FSM', 'Customers', 'Work Order Management', 'Dispatch Console', 'Services And Parts', 'Assets', 'Workforce', and 'Reports'. The 'Filter users' dropdown menu is open, showing options: 'Active Users' (selected), 'Inactive Users', 'Invited Users', and 'Deleted Users'. The main table displays a list of users with columns: Full Name, Email, Profile, Status, Created By, and Created Time.

Full Name	Email	Profile	Status	Created By	Created Time
Mary Cooper	[redacted].com	Administrator	Active	Mary Cooper	Apr 20, 2022 05:18 am
Jeff Difford	[redacted].com	Field Agent	Active	Mary Cooper	Apr 20, 2022 05:57 am
Rob Reiner	[redacted].com	Field Agent	Active	Mary Cooper	Jun 07, 2022 02:20 am
Karen Edwards	[redacted].com	Field Agent	Active	Mary Cooper	Jun 07, 2022 02:44 am
Susan Hayworth	[redacted].com	Field Agent	Active	Mary Cooper	Jun 28, 2022 10:33 pm
Ron Weasley	[redacted].com	Dispatcher	Active	Mary Cooper	Jul 10, 2022 11:13 pm

Search Users

You can also perform search by applying search criteria on multiple fields.



The screenshot shows the FSM Workforce management interface with search criteria applied. The 'Filter users' dropdown menu is open, showing search criteria: 'Email' (contains 'zylker') and 'First Name' (isn't 'Daniel'). The main table displays a list of users with columns: Full Name, Email, Profile, Status, Created By, and Created Time.

Full Name	Email	Profile	Status	Created By	Created Time
Mary Cooper	[redacted].com	Administrator	Active	Mary Cooper	Apr 20, 2022 05:18 am
Jeff Difford	[redacted].com	Field Agent	Active	Mary Cooper	Apr 20, 2022 05:57 am
Rob Reiner	[redacted].com	Field Agent	Active	Mary Cooper	Jun 07, 2022 02:20 am
Karen Edwards	[redacted].com	Field Agent	Active	Mary Cooper	Jun 07, 2022 02:44 am
Susan Hayworth	[redacted].com	Field Agent	Active	Mary Cooper	Jun 28, 2022 10:33 pm
Ron Weasley	[redacted].com	Dispatcher	Active	Mary Cooper	Jul 10, 2022 11:13 pm