

Dashboards

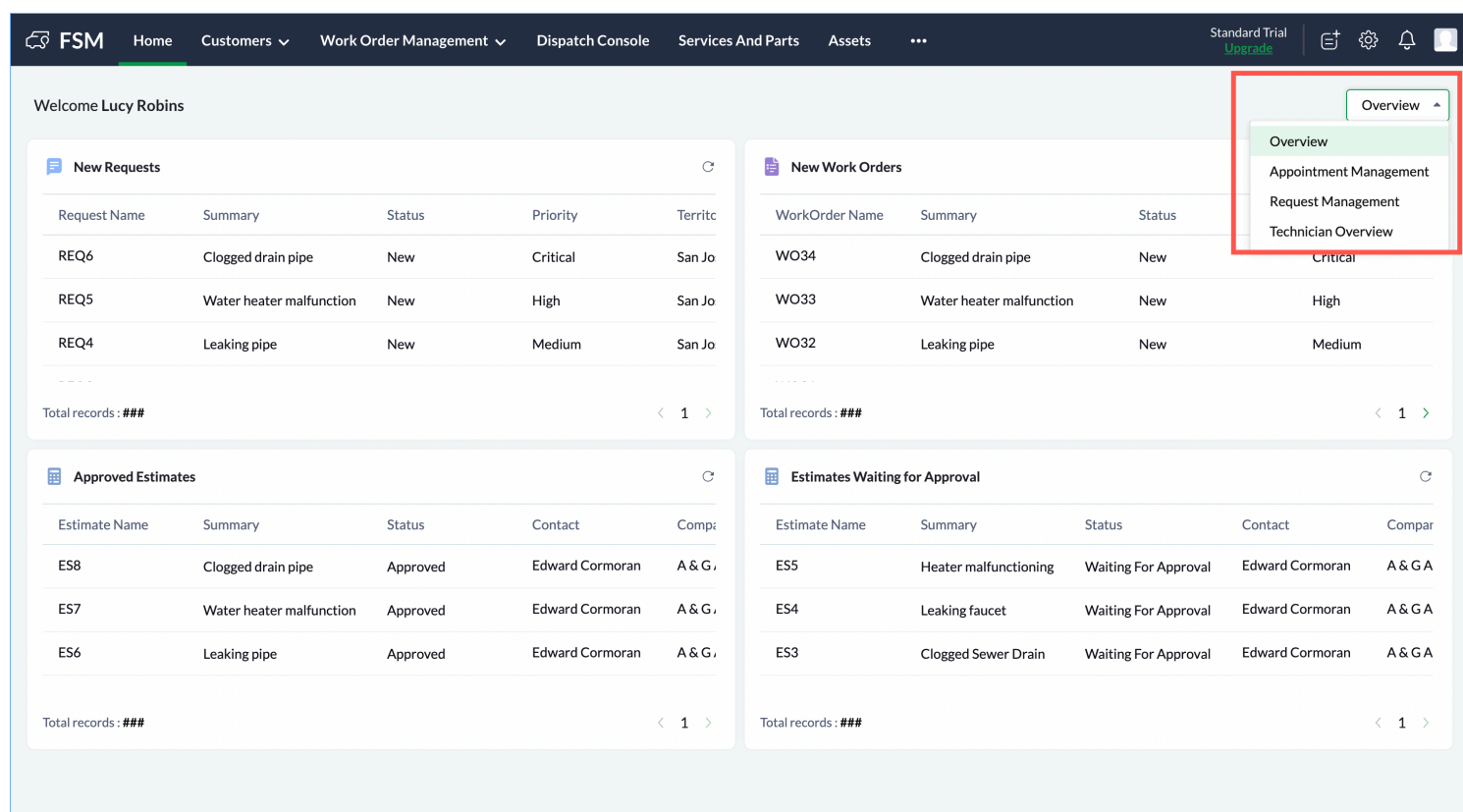
In Zoho FSM, you handle several types of transactions. Astute processing of this data can help you get insights into your customer behaviour and accurately gauge the trajectory your business is on. A **Dashboard** presents this data to you in a manner that will help you make sense of it easily. You can identify discernible patterns, and areas of improvement that can be translated to actionable items. The dashboards will be accessible to users of all profiles (including custom profiles) except Limited Field Agent.

A dashboard consists of two components:

- **KPIs:** Key performance indicators (KPIs) are metrics pertaining to the logged in user. They provide a comparative analysis of the logged in user's activities for the current month w.r.t the previous.
- **Views:** They are lists based on pre-defined filters that offer you useful groupings of the activities in FSM.


In Zoho FSM, there are four dashboards available:

- [Overview](#)
- [Appointment Management](#)
- [Request Management](#)
- [Technician Overview](#)



The screenshot displays the Zoho FSM dashboard for user Lucy Robins. The interface includes a top navigation bar with links to Home, Customers, Work Order Management, Dispatch Console, Services And Parts, and Assets. A sidebar on the right contains a menu with the following options: Overview (selected), Appointment Management, Request Management, and Technician Overview. The main content area is divided into four sections:

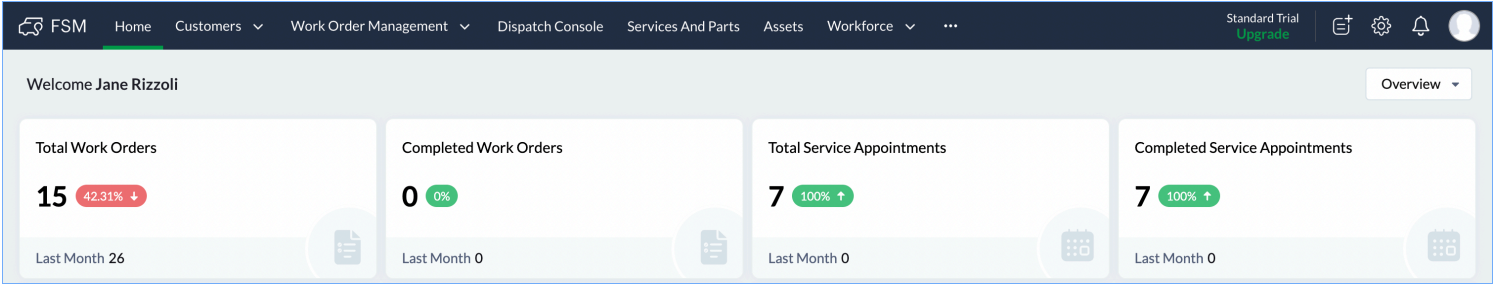
- New Requests:** A table with columns: Request Name, Summary, Status, Priority, and Territory. It lists three requests: REQ6 (Clogged drain pipe, New, Critical, San Jo), REQ5 (Water heater malfunction, New, High, San Jo), and REQ4 (Leaking pipe, New, Medium, San Jo). Total records: ###.
- New Work Orders:** A table with columns: WorkOrder Name, Summary, Status, and Priority. It lists three work orders: WO34 (Clogged drain pipe, New, Critical), WO33 (Water heater malfunction, New, High), and WO32 (Leaking pipe, New, Medium). Total records: ###.
- Approved Estimates:** A table with columns: Estimate Name, Summary, Status, Contact, and Comparison. It lists three estimates: ES8 (Clogged drain pipe, Approved, Edward Cormoran, A & G), ES7 (Water heater malfunction, Approved, Edward Cormoran, A & G), and ES6 (Leaking pipe, Approved, Edward Cormoran, A & G). Total records: ###.
- Estimates Waiting for Approval:** A table with columns: Estimate Name, Summary, Status, Contact, and Comparison. It lists three estimates: ES5 (Heater malfunctioning, Waiting For Approval, Edward Cormoran, A & G), ES4 (Leaking faucet, Waiting For Approval, Edward Cormoran, A & G), and ES3 (Clogged Sewer Drain, Waiting For Approval, Edward Cormoran, A & G). Total records: ###.

Click on an entry in the view to navigate to the record. Click the **Refresh**  icon to get the latest data.

Overview

In this dashboard, you will be able to see the following:

KPIs



Views

- **New Requests:** All requests in the **New** status
- **New Work Orders:** All work orders in the **New** status
- **Approved Estimates:** All estimates in the **Approved** status
- **Estimates Waiting for Approval:** All estimates in the **Waiting For Approval** status

New Requests

Request Name	Summary	Status	Priority	Territc
REQ6	Clogged drain pipe	New	Critical	San Jo
REQ5	Water heater malfunction	New	High	San Jo
REQ4	Leaking pipe	New	Medium	San Jo
Total records : ###				

Approved Estimates

Estimate Name	Summary	Status	Contact	Compi
ES8	Clogged drain pipe	Approved	Edward Cormoran	A & G
ES7	Water heater malfunction	Approved	Edward Cormoran	A & G
ES6	Leaking pipe	Approved	Edward Cormoran	A & G
Total records : ###				

New Work Orders

WorkOrder Name	Summary	Status	Priority
WO34	Clogged drain pipe	New	Critical
WO33	Water heater malfunction	New	High
WO32	Leaking pipe	New	Medium
Total records : ###			

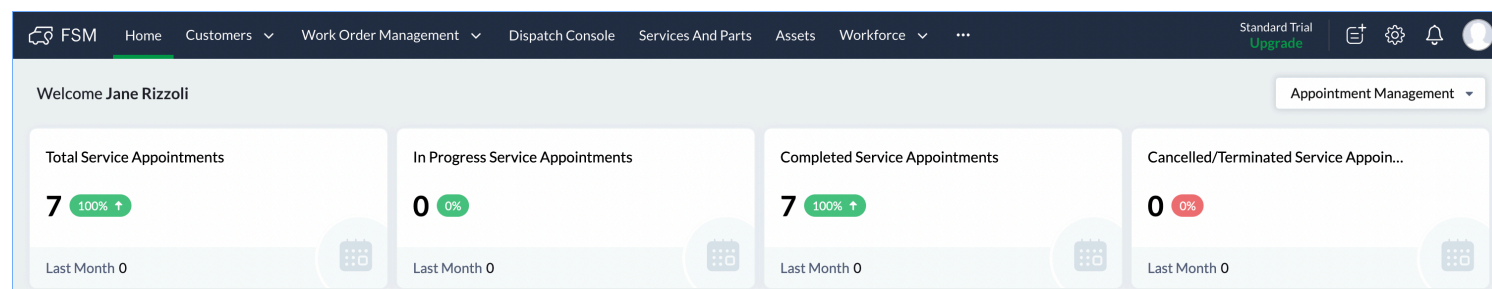
Estimates Waiting for Approval

Estimate Name	Summary	Status	Contact	Compar
ES5	Heater malfunctioning	Waiting For Approval	Edward Cormoran	A & G A
ES4	Leaking faucet	Waiting For Approval	Edward Cormoran	A & G A
ES3	Clogged Sewer Drain	Waiting For Approval	Edward Cormoran	A & G A
Total records : ###				

Appointment Management

In this dashboard, you will be able to see the following:

KPIs



Views

- **New Work Orders:** All work orders in the **New** status
- **Scheduled Service Appointments:** All service appointments in the **Scheduled** status
- **Dispatched Service Appointments:** All service appointments in the **Dispatched** status

The screenshot shows the detailed views section of the FSM dashboard for user Lucy Robins. It contains four tables:

New Work Orders

WorkOrder Name	Summary	Status	Priority	Territory	Contact	Company	Asset	WorkOrder Owner	Created
WO43	Plumbing	New	Critical	San Jose	Edward Cormoran	A & G Aircool		Lucy Robins	Dec 2
WO42	Corroded Metal Pipe	New	Medium	San Jose	Edward Cormoran	A & G Aircool		Lucy Robins	Dec 2
WO41	Sewer cleaning	New	Critical	San Jose	Edward Cormoran	A & G Aircool		Lucy Robins	Dec 2

Total records : 34

Scheduled Service Appointments

Appointment Name	Territory	Status	Summary	Actual End Date Time
AP-40	San Jose	Scheduled	Water heater malfunction	
AP-39	San Jose	Scheduled	Leaking pipe	
AP-20	San Jose	Scheduled	Water heater malfunction	

Total records : 3

Dispatched Service Appointments

Appointment Name	Actual End Date Time	Actual Start Date Time	Company	Create
AP-44			A & G Aircool	Dec 2
AP-42			A & G Aircool	Dec 21
AP-41			A & G Aircool	Dec 21

Total records : 16

In Progress Service Appointments

Appointment Name	Territory	Status	Summary	Actual End Date Time
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Total records : 0

Completed Service Appointments

Appointment Name	Territory	Status	Summary	Actual End Date Time
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Total records : 0

- **In Progress Service Appointments:** All service appointments in the **In Progress** status
- **Completed Service Appointments:** All service appointments in the **Completed** status
- **Cancelled Service Appointments:** All service appointments in the **Cancelled** status
- **Terminated Service Appointments:** All service appointments in the **Cannot Complete** status

FSM

Home

Customers

Work Order Management

Dispatch Console

Services And Parts

Assets

...

Standard Trial Upgrade

Welcome Lucy Robins

Appointment Management

Total records : ###

< 1 >

In Progress Service Appointments

Appointment Name	Actual End Date Time	Actual Start Date Time	Company
AP-45		Dec 21, 2022 12:47 AM (GMT -07...	A & G Aircool
AP-43		Dec 21, 2022 12:33 AM (GMT -07...	A & G Aircool

Total records : 2

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Total records : ###

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Completed Service Appointments

Appointment Name	Territory	Status	Summary	Com
AP-47	San Jose	Completed	Replace faucet	A & G Aircool
AP-46	San Jose	Completed	Replace faucet	A & G Aircool

Total records : 14

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Cancelled Service Appointments

Appointment Name	Territory	Status	Summary	Actual End D
AP-49	San Jose	Cancelled	Sewer cleaning	
AP-48	San Jose	Cancelled	Water heater leak	
AP-13	San Jose	Cancelled	Sewer cleaning	

Total records : 4

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Terminated Service Appointments

Appointment Name	Territory	Status	Summary	Company
AP-51	San Jose	Cannot Complete	Plumbing	A & G Aircool
AP-50	San Jose	Cannot Complete	Corroded Metal Pipe	A & G Aircool

Total records : 2

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Request Management

In this dashboard, you will be able to see the following:

KPIs

<div> <div>FSM</div> <div>Home</div> <div>Customers</div> <div>Work Order Management</div> <div>Dispatch Console</div> <div>Services And Parts</div> <div>Assets</div> <div>Workforce</div> <div></div> </div> <div>Standard Trial Upgrade</div> <div> <div></div> <div></div> <div></div> <div></div> </div>				
<div>Welcome Jane Rizzoli</div> <div>Request Management</div>				
<div> <div>Total Requests</div> <div>2 100% ↑</div> <div>Last Month 1</div> <div></div> </div>				
<div> <div>Total Converted Requests</div> <div>0 0%</div> <div>Last Month 0</div> <div></div> </div>				
<div> <div>Completed Requests</div> <div>0 0%</div> <div>Last Month 0</div> <div></div> </div>				
<div> <div>Cancelled/Terminated Requests</div> <div>0 0%</div> <div>Last Month 0</div> <div></div> </div>				

Views

- **New Requests:** All requests in the **New** status
- **New Estimates:** All estimates in the **New** status
- **Completed Requests:** All requests in the **Completed** status
- **Cancelled Requests:** All requests in the **Cancelled** status

FSM Home Customers Work Order Management Dispatch Console Services And Parts Assets					Standard Trial Upgrade				
Welcome Lucy Robins					Request Management				
New Requests					New Estimates				
Request Name	Summary	Status	Priority	Territory	Estimate Name	Summary	Status	Contact	Company
REQ8	Heater malfunction	New	High	San Jose	ES10	Clogged drains	New	Edward Cormoran	A & G Airco
					ES9	Geyser malfunction	New	Edward Cormoran	A & G Airco
					ES2	Geyser malfunction	New	Edward Cormoran	A & G Airco
Total records : 1					Total records : 4				
Completed Requests					Cancelled Requests				
Request Name	Summary	Status	Priority	Territory	Request Name	Summary	Status	Priority	Territory
REQ7	Rusted pipes	Completed	Medium	San Jose	REQ2	Heater malfunctioning	Cancelled	High	San Jose
					REQ1	Leaking faucet	Cancelled	Medium	San Jose
Total records : 1					Total records : 2				
Approved Estimates					Cancelled Estimates				

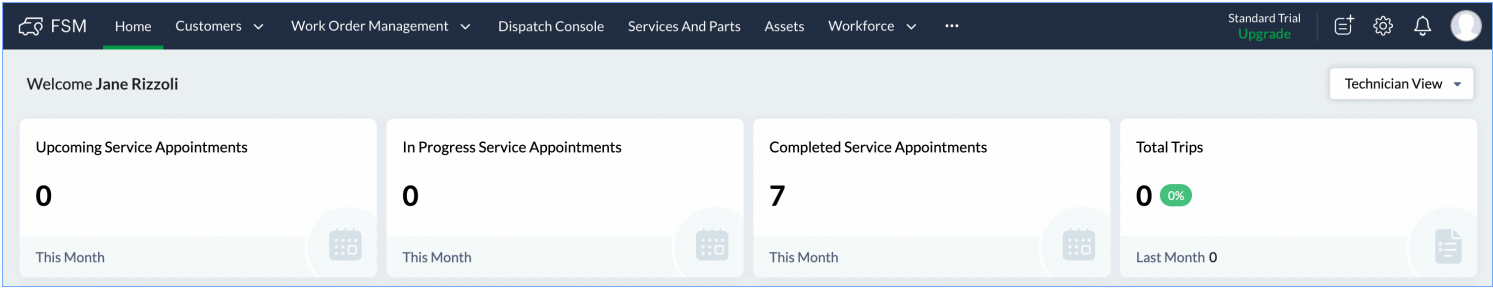
- **Approved Estimates:** All estimates in the **Approved** status
- **Cancelled Estimates:** All estimates in the **Cancelled** status

FSM Home Customers Work Order Management Dispatch Console Services And Parts Assets					Standard Trial Upgrade				
Welcome Lucy Robins					Request Management				
Total records : 1					Total records : 4				
Completed Requests					Cancelled Requests				
Request Name	Summary	Status	Priority	Territory	Request Name	Summary	Status	Priority	Territory
REQ7	Rusted pipes	Completed	Medium	San Jose	REQ2	Heater malfunctioning	Cancelled	High	San Jose
					REQ1	Leaking faucet	Cancelled	Medium	San Jose
Total records : 1					Total records : 2				
Approved Estimates					Cancelled Estimates				
Estimate Name	Summary	Status	Contact	Company	Estimate Name	Summary	Status	Contact	Company
ES4	Leaking faucet	Approved	Edward Cormoran	A & G Airco	ES6	Leaking pipe	Cancelled	Edward Cormoran	A & G Air
ES3	Clogged Sewer Drain	Approved	Edward Cormoran	A & G Airco	ES5	Heater malfunctioning	Cancelled	Edward Cormoran	A & G Air
Total records : 2					Total records : 2				

Technician Overview

In this dashboard, you will be able to see the following:

KPIs



Views

- **My Dispatched Service Appointments:** All the service appointments assigned to the logged in user that is in the **Dispatched** status.
- **My In Progress Service Appointments:** All the service appointments assigned to the logged in user that is in **In Progress** status.
- **My Completed Appointments:** All the service appointments assigned to the logged in user that is in **Completed** status
- **My Cancelled Appointments:** All the service appointments assigned to the logged in user that is in the **Cancelled** status.

The screenshot shows the FSM dashboard for Lucy Robins, displaying four detailed views of service appointments. Each view includes a table of appointments and a 'Total records: ###' indicator.

My Dispatched Service Appointments

Appointment Name	Actual End Date Time	Actual Start Date Time	Created Time
AP-55			Dec 21, 2022 02:46 AM (GMT)
AP-44			Dec 21, 2022 12:33 AM (GMT)
AP-42			Dec 21, 2022 12:32 AM (GMT)

Total records: ###

My In Progress Service Appointments

Appointment Name	Territory	Actual End Date Time	Actual Start Date Time
AP-54	San Jose		Dec 21, 2022 02:45 AM (GMT -07)

Total records: ###

My Completed Appointments

Appointment Name	Territory	Status	Summary	Act
AP-53	San Jose	Completed	Plumbing	Dec
AP-43	San Jose	Completed	Leaking faucet	Dec
AP-41	San Jose	Completed	Clogged drain pipe	Dec

Total records: ###

My Cancelled Appointments

Appointment Name	Territory	Summary	Status	Actual En
AP-57	San Jose	Geyser uninstallation	Cancelled	
AP-56	San Jose	Yearly drain cleaning	Cancelled	
AP-13	San Jose	Yearly drain cleaning	Cancelled	

Total records: ###