Overview of Zoho FSM

What is Zoho FSM?

Zoho FSM is a cloud application that offers an overarching solution for handling the entire life cycle of processes involved in the management and execution of field services. All processes that are pivotal to field services are automated, such as work order management, scheduling, dispatching and tracking of service appointments, and invoicing. This eliminates the burden of paperwork and other tedious manual tasks that usually bog down field service activities.

By providing a unified platform that allows users to segue into the different field processes, Zoho FSM helps users carry out their tasks efficiently. The availability of composite, real-time information about the process entities provides users with the visibility that helps enhance first-time fix rates and lessen process errors. Field agents have access to pertinent data to complete their assigned tasks swiftly and efficiently. Service appointments can be scheduled based on their territory, and dispatched to the most appropriate agent to ensure minimum turnaround time. The mobile app is a handy tool for the on-the-go field agents. Built-in invoicing features ensure that billing times are greatly reduced, resulting in immediate payments and realization of revenue.

Why use Zoho FSM?

Let us consider for example the case of *Hot&Cold*, a company in Santa Rosa, CA that offers HVAC (heating, ventilation, and air conditioning) services. The services by Hot&Cold include HVAC installation, maintenance, repairs, and retrofit. Its workforce of over 50 experienced and certified agents cater to the needs of homes and businesses alike. Hot&Cold has been grappling with disparate software systems that they have been using to handle scheduling of appointments, invoicing, and payments. Their work was also hampered by the use of paper forms whose handling and maintenance involved a great number of the call center agents, often resulting in lost business.

Zoho FSM is an ideal fit for companies like *Hot&Cold*, which would substantially benefit from a solution that automates their end-to-end field processes.

By adopting Zoho FSM, all the stakeholders of Hot&Cold can gain necessary visibility over tasks and information that are relevant to their roles and responsibilities. Irrespective of the size of your team, your geographical expanse, employee types, or services provided, Zoho FSM will be the right choice to fast-track your business to greater success.

Key Benefits

With Zoho FSM, the benefits are multifold, including:

Streamline field operations: Automation of work order management helps streamline incoming service requests and eliminate redundant manual work. You can assign work to the right agent based on skill and location and expedite handling of commonly requested services. You can also efficiently manage invoices, quotes, and all back office operations.

Improve agent productivity: The FSM Mobile App for agents help them to keep track of their appointment details, create service reports, raise invoice and receive payment. The app also aids in engaging with the customer, procuring the required parts needed for the service, and navigating to the service location. The work can be assigned to the nearest agent thereby decreasing delay in reaching the customer's place.

Efficient team management: Zoho FSM offers a multi-user environment by supporting different profiles: Administrator, Call Center Agent, Dispatcher, Field Agent and Limited Field Agent. Additionally, you can manage service teams through Crews. You can manage multiple service areas like geography, departments, and commerce, using Territory management. Above all, Skills help segregate and manage agents.

Impress your customers: You can engage with customers over multiple channels, via emails, and phone. Customers can make payments for services rendered either through online or offline mode. They can also choose to cancel or reschedule service appointment based on their convenience.

Ace process KPIs: Maintaining optimum values for key performance indicators is crucial for any business. Using Zoho FSM, you can ace some of the key KPIs for fields services like first-time fix rates, work orders closed per day, agent idle time, among others.

Feature Highlights

Manage your workforce: Zoho FSM allows you to set up your field service organisation by defining your Administrators, Dispatchers, Call Center Agents and Field Agents. You can also add pertinent details about the territories they work in and the agent's skills.

Customize FSM for your business: Zoho FSM is built to adapt to your organization's unique requirements. You can personalize your account to add industry-specific data components and specialised workflows. It is also possible to integrate Zoho FSM with any third party service.

Schedule and dispatch with efficiency: You can create intra-day schedules spanning across days. Use Zoho FSM's built-in Gantt and map views to manage your work requests, schedule appointments and assign the right field agents based on their skills and the location.

Work Order Management: Manage myriad work orders, whether they need to be assigned to multiple agents or

to a crew. You can also schedule multiple day appointments, and create a Service Report once the work is completed.

Estimates, Invoicing and Payments: Zoho FSM lets you create detailed estimates and invoices that go with your company's branding. To facilitate invoicing, and payments, Zoho FSM has built-in integration with Zoho Books. Your field agents can create invoices and facilitate online payment for appointments.

Manage Customers: Customer details can be easily managed, and you can view the complete history of the customer's previous requests, work orders, invoices, and payment.

Mobilize your workforce: Transform your agents into a formidable field unit with the Zoho FSM's mobile app. The app can be used to check their schedules, accurately navigate to the service locations, log authentic data from out in the field (including attaching photos and adding notes), take the right equipment, create service report, and easily collect online payments.

Service Analytics and Reports: Use over 20+ built-in reports and dashboards to improve service performance. You also have the option to create custom reports to track the KPI's, identify pain points, and to make smarter data-driven decisions.

Integrations: Zoho FSM can be integrated with any service that supports a token-based authentication or OAuth. For example, it can be integrated with an SMS provider to send SMS messages to customers so as to keep them updated on any change regarding the service request. It can also be integrated with any accounting solution.

REST API's: Integrate using the APIs to start syncing work orders across services in real-time.

Zoho FSM Process Flow

1.0 Request to Service Appointments

Convert to Estimate

Send Estimate

Create Request

Requests can be created via Zoho FSM, Web Forms, Email Parsers, and APIs.

Create Estimate

Estimate provides a ballpark figure for how much it would cost to provide the services asked for in a Request.

Send Estimate

Estimate is emailed to the customer for approval.

To Customer

Convert to Work Order

Approved | Expired | Rejected | Cancelled

Create Work Order

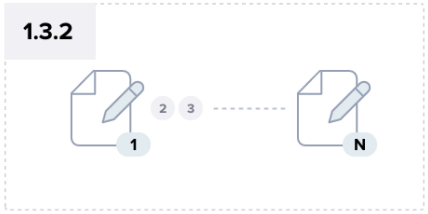
A Work Order is created for executing the customer service request.

Service

For providing among others, repair, installation, or maintenance services

Inspection

- For performing diagnostics tasks
- For work orders of type inspection, you can create a **follow up work order and a follow up estimate**



Create Service Appointments (Single/ Multiple)

Service appointments are jobs created for carrying out the services in a work order. More than one service appointment can be created for a work order

2.0 Scheduling & Dispatching

2.1

Schedule Service Appointments

Service appointments are scheduled by assigning it to a field technician or crew.

2.2

Dispatch Service Appointments

When a service appointment is dispatched, the field technicians assigned to the appointment are notified in their FSM mobile app through push notifications.

3.0 Start Work to Close Request

3.1

Start Work

After reaching the service location, the field technician commences the work for the service appointment.

Service Report

3.2

Complete Work

When the tasks for the service appointment have been finished, the field technician marks the service appointment as complete.

3.3

Generate Invoice

Once the work is completed, the invoice can be generated.

3.4

Send Invoice

Generated invoice can be sent to the customer and any other intended recipient.

To Customer

3.5

Record Payment

Once the invoice is sent, you can to pay it online or offline.

3.6

3.7

Complete Request

When all the services in a request are completed.

Close Request

When all the payment for all the services in a request have been made.