



Profiles and Permissions

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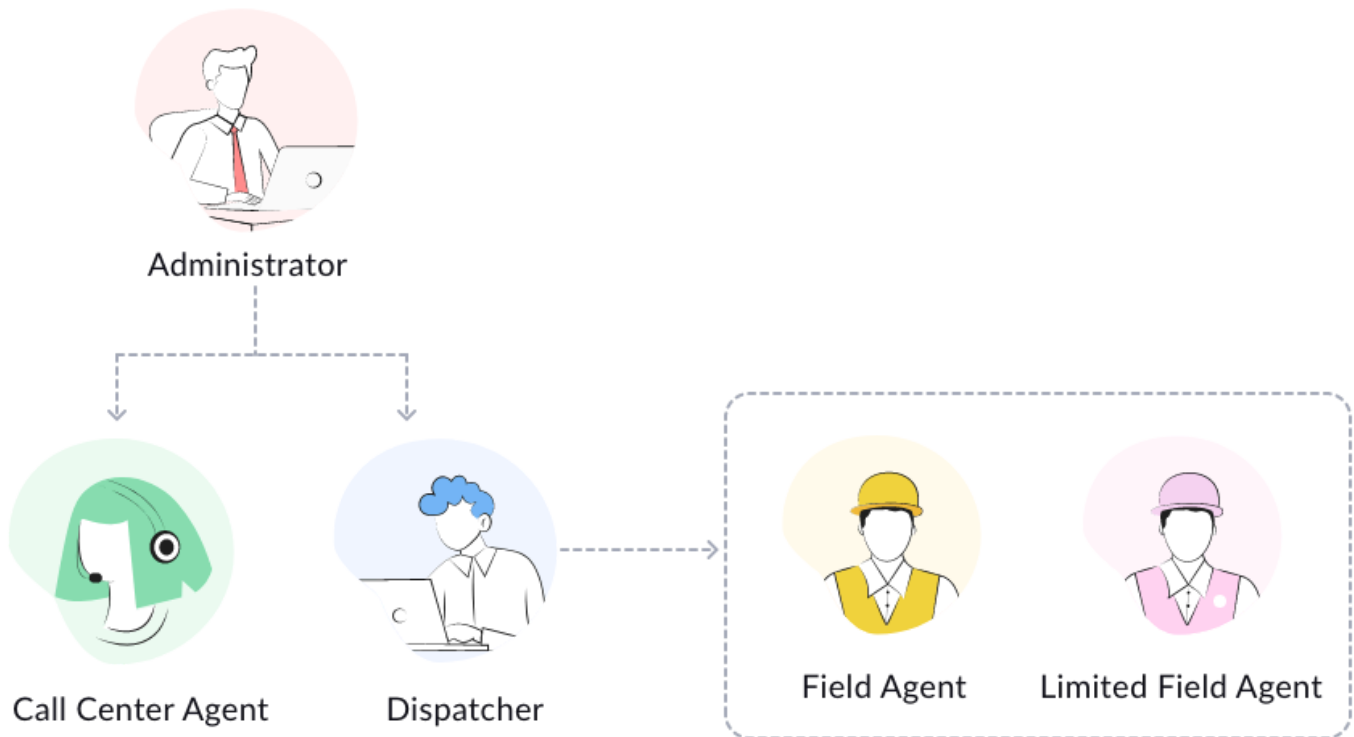
A **Profile** defines the set of permissions and accessibility within the application. In FSM, there are two types of profiles:

- [Standard Profiles](#)

- [Custom Profiles](#)

Standard Profiles

There are five standard or built-in profiles in the Zoho FSM application: **Administrator**, **Dispatcher**, **Call Center Agent**, **Field Agent** and **Limited Field Agent**. You can view these profiles at **Setup > Workforce > Profiles**. You cannot modify the permissions of a standard profile.



The **Administrator** sets up Zoho FSM for their organization. They manage the users and allocate them their permissions. They can integrate FSM with other third-party services using Zoho FSM's API layer. They can also keep track of all the changes in the system using the Audit Logs. Given below is the summary of the administrator permissions:

- This profile has all-encompassing access to the solution. They have complete access to all the modules in FSM and also to its **Setup**.
- The following permissions are only available to the Administrator profile:
 - They can add **Users** to FSM, allocate them profiles, and manage them.
 - They can manage the settings required for the **Billing** (Invoice/Books) **Integration**. Both the manual and automatic sync between FSM and Invoice/Books can be enabled or initiated by this profile. **Taxes** can be added and managed.
 - **Workflow Rules** can be created to automate activities in FSM. They can extend the functionality of the application by using **Functions** and **Field Updates** in conjunction with the workflow rules.

- They can easily migrate data from any existing system to FSM through **Data Import**. Through data Import, they can quickly add data to the primary modules of FSM. Data can also be exported from FSM.
- They can analyse data in FSM to find possible trends, patterns, etc through the **Reports**.
- They can perform **Bulk Actions** like bulk delete.
- They have **General Permissions** that govern the ability to modify the [organizational settings](#).

The **Dispatcher** manages the appointments primarily using the dispatch console. The dispatch console gives them a complete view of the work that has already been assigned and the work that needs to be assigned. It gives them a quick snapshot of what each agent is currently working on and all their future appointments. It helps them assign the right agent to the new work orders. Given below is the summary of the dispatcher permissions:

- Next to Administrator, Dispatcher is the profile with the complete module permissions, especially for the transaction modules, i.e. Requests, Estimates, Work Orders, Service Appointments.
- This is the only profile other than the Administrator that has access to the **Dispatch Console**.
The **Gantt** view contains real time data for the tracking and managing of service appointments, and work orders. The **Map** view displays the location of the field agents and the service addresses of the appointments.
- They also have complete access to all the records pertaining to a field agent, i.e, **User Location, Trips, Time Sheets, Time Off**
- They can be assigned to service appointments since they have the **Use as Field Agent** permission.
- They have the **Zoho FSM API access** permission which enables them to use FSM's REST APIs for creating third party integrations.

The **Call Center Agent** is at the frontline and creates the service requests raised by the customers as Requests or Work Orders in Zoho FSM. They have permission to view all the customer details and the work order details and status. Given below is the summary of the call center agent permissions:

- This profile has even restricted permissions than the dispatcher.
- They have the required module permissions to create records necessary for a customer request.
- They do not have access to the Dispatch Console.
- They have the **Zoho FSM API access** permission which enables them to use FSM's REST APIs for creating third party integrations.
- In the mobile app, they also have the permission to view the **Pricing** details in service appointments and service report.

The **Field Agent** as well as the Dispatcher gets assigned work and they keep track of all their appointments using the FSM Mobile app. They have permission to view the customer details, work order details, view pricing details, complete the work, generate service report, raise invoice and also get payments done. They can also create work orders and appointments and assign them to themselves. Given below is the summary of the field agent permissions:

- They have access to the Service Appointments module and limited access to its related entities such as Service And Parts, Time Sheets, Service Report, Trips, and Notes.

- Apart from the modules pertaining to Customer Management and Work Order Management, the other permissions are mostly restricted to the View access.
- They can be assigned to service appointments since they have the **Use as Field Agent** permission.
- In the mobile app, they also have the permission to view the **Pricing details** in service appointments and service report.
- They have the **Zoho FSM API access** permission which enables them to use FSM's REST APIs for creating third party integrations.

The **Limited Field Agent** has fewer permissions than the standard Field Agent. They do not have permission to view work order details and pricing details. They can still keep track of all the appointments assigned to them using the mobile app, and, once completed, can mark work as completed. Given below is the summary of the limited field agent permissions:

- This profile can be considered as "Field Agent Lite".
- They have the bare minimum of permissions, especially related to Service Appointments
- They will have access to the FSM **mobile** app but they cannot view the pricing details.

Permissions

The different types of permissions that a profile can have are as follows:

Record Access

- If **All Records** permission is granted for a category of records, then they can access all the records of the category. For example, if the Administrator is given All Records access to the Assets module, then they can access any asset record irrespective of whether they are the owner of the record or not.
- If **Own records** permission is granted for a category of records, then they can only access those records of the category of which they are the owner.

Services And Parts		All Records ▾	View,Create,Edit,Delete ▾
Assets		All Records ▾	View,Create,Edit,Delete ▾
Time Off		All Records ▾	View,Create,Edit,Delete ▾
		Own Records ▾	View,Create,Edit,Delete ▾
Crew		All Records ▾	View,Create,Edit,Delete ▾











Record Operations

This permission will determine which of the basic operations on a record, namely **Create**, **View**, **Edit**, and **Delete**, can a user with the profile perform.

Services And Parts		All Records	View,Create,Edit,Delete
Assets		All Records	View,Create,Edit,Delete
Time Off		All Records	View,Create,Edit,Delete
		Own Records	View,Create,Edit,Delete
Crew		All Records	View,Create,Edit,Delete

Record Actions

This permission will determine the actions the user with the profile can perform on a record such as Complete Work, Convert to Estimate, etc. These actions, where applicable, will be available in the records to which they have access.

Requests		All Records	View,Create,Edit,Delete,Conve...
Estimates		All Records	View,Create,Edit,Delete,Send ...
Work Orders		All Records	View,Create,Edit,Delete
Service Appointments		All Records	View,Create,Edit,Delete
Service Reports		All Records	View,Create,Edit,Delete
Trips		All Records	View,Create
Time Sheets		All Records	View,Create,Edit,Delete
Services And Parts		All Records	View,Create,Edit,Delete
Assets		All Records	View,Create,Edit,Delete
Time Off		All Records	View,Create,Edit,Delete

- ☒ View
- ☒ Create
- ☒ Edit
- ☒ Delete
- ☒ Send Estimate
- ☒ Approve
- ☒ Reject
- ☒ Convert To Work Order
- ☒ Cancel
- ☒ Expired

Feature Access

You can enable or disable the features for a profile. Only if the feature is enabled for the profile, will they have access to it.

Services And Parts		All Records	View,Create,Edit,Delete
Assets		All Records	View,Create,Edit,Delete
Time Off		All Records	View,Create,Edit,Delete
		Own Records	View,Create,Edit,Delete
Crew		All Records	View,Create,Edit,Delete

Basic Permissions

Feature	Actions Allowed		Admin	Dispatcher	Call Center Agent	Field Agent	Limited Field Agent
Contacts	All Records	View	✓	✓	✓	✓	✓
		Create	✓	✓	✓	✓	✓
		Edit	✓	✓	✓	✓	✗
		Delete	✓	✓	✓	✗	✗
	Own Records	View	✓	✓	✓	✓	✓
		Create	✓	✓	✓	✓	✓
		Edit	✓	✓	✓	✓	✗
		Delete	✓	✓	✓	✗	✗
	Change Owner		✓	✓	✗	✗	✗

Feature	Actions Allowed		Admin	Dispatcher	Call Center Agent	Field Agent	Limited Field Agent
Companies	All Records	View	✓	✓	✓	✓	✓
		Create	✓	✓	✓	✓	✓
		Edit	✓	✓	✓	✓	✗
		Delete	✓	✓	✓	✗	✗
	Own Records	View	✓	✓	✓	✓	✓
		Create	✓	✓	✓	✓	✓
		Edit	✓	✓	✓	✓	✗
		Delete	✓	✓	✓	✗	✗
	Change Owner		✓	✓	✗	✗	✗

Feature	Actions Allowed		Admin	Dispatcher	Call Center Agent	Field Agent	Limited Field Agent
Requests	All Records	View	✓	✓	✓	✗	✗
		Create	✓	✓	✓	✗	✗
		Edit	✓	✓	✓	✗	✗
		Delete	✓	✓	✓	✗	✗
	Own Records	View	✓	✓	✓	✓	✓
		Create	✓	✓	✓	✓	✗
		Edit	✓	✓	✓	✓	✗

	Delete	✓	✓	✓	✗	✗
Change Owner		✓	✓	✗	✗	✗
Convert to Work Order		✓	✓	✗	✗	✗
Convert to Estimate		✓	✓	✓	✗	✗
Cancel		✓	✓	✓	✗	✗
Terminate		✓	✓	✓	✗	✗
Download		✓	✓	✓	✓	✗
Print		✓	✓	✓	✓	✗
Change Territory		✓	✓	✗	✗	✗

Feature	Actions Allowed		Admin	Dispatcher	Call Center Agent	Field Agent	Limited Field Agent
Estimates	All Records	View	✓	✓	✓	✗	✗
		Create	✓	✓	✓	✗	✗
		Edit	✓	✓	✓	✗	✗
		Delete	✓	✓	✓	✗	✗
	Own Records	View	✓	✓	✓	✓	✗
		Create	✓	✓	✓	✓	✗
		Edit	✓	✓	✓	✓	✗
		Delete	✓	✓	✓	✗	✗
	Change Owner		✓	✓	✗	✗	✗
	Send Estimate		✓	✓	✓	✗	✗
	Approve		✓	✓	✓	✗	✗
	Reject		✓	✓	✓	✗	✗
	Convert to Work Order		✓	✓	✓	✗	✗
	Cancel		✓	✓	✗	✗	✗
	Mark as Expired		✓	✓	✗	✗	✗
	Mark as Sent		✓	✓	✓	✗	✗
	Mark as Approved		✓	✓	✓	✗	✗
	Download		✓	✓	✓	✓	✗
	Print		✓	✓	✓	✓	✗
	Change Territory		✓	✓	✗	✗	✗

Feature	Actions Allowed		Admin	Dispatcher	Call Center Agent	Field Agent	Limited Field Agent
Work Orders	All Records	View	✓	✓	✓	✗	✗
		Create	✓	✓	✓	✗	✗
		Edit	✓	✓	✓	✗	✗
		Delete	✓	✓	✓	✗	✗
	Own Records	View	✓	✓	✓	✓	✓
		Create	✓	✓	✓	✓	✗
		Edit	✓	✓	✓	✓	✗
		Delete	✓	✓	✓	✗	✗
	Change Owner		✓	✓	✗	✗	✗
	Edit Line Items		✓	✓	✓	✓	✗
	Complete		✓	✓	✗	✗	✗
	Close		✓	✓	✗	✗	✗
	Cancel		✓	✓	✓	✗	✗
	Terminate		✓	✓	✓	✗	✗
	Non Billable		✓	✓	✓	✓	✓
	Void		✓	✓	✓	✓	✓
	Download		✓	✓	✓	✓	✗
	Print		✓	✓	✓	✓	✗
	Revert		✓	✓	✓	✗	✗
	Change Territory		✓	✓	✗	✗	✗

Feature	Actions Allowed		Admin	Dispatcher	Call Center Agent	Field Agent	Limited Field Agent
Service Appointments	All Records	View	✓	✓	✓	✗	✗
		Create	✓	✓	✓	✗	✗
		Edit	✓	✓	✓	✗	✗
		Delete	✓	✓	✗	✗	✗
	Own Records	View	✓	✓	✓	✓	✓
		Create	✓	✓	✓	✓	✗
		Edit	✓	✓	✓	✓	✗
		Delete	✓	✓	✗	✗	✗
	Dispatch		✓	✓	✗	✓	✗

	Complete Work	✓	✓	✗	✓	✓
	Start Work	✓	✓	✗	✓	✓
	Cancel	✓	✓	✗	✓	✓
	Terminate	✓	✓	✗	✓	✓
	Download	✓	✓	✓	✓	✗
	Print	✓	✓	✓	✓	✗
	Reschedule	✓	✓	✓	✓	✓
	Revert	✓	✓	✓	✗	✗
	Change Territory	✓	✓	✗	✗	✗

Feature	Actions Allowed		Admin	Dispatcher	Call Center Agent	Field Agent	Limited Field Agent
Trips	All Records	View	✓	✓	✗	✗	✗
		Create	✓	✓	✗	✗	✗
		Edit	✓	✓	✗	✗	✗
		Delete	✓	✓	✗	✗	✗
	Own Records	View	✓	✓	✓	✓	✓
		Create	✓	✓	✓	✓	✓
		Edit	✓	✓	✓	✓	✓
		Delete	✓	✓	✗	✗	✗

Feature	Actions Allowed		Admin	Dispatcher	Call Center Agent	Field Agent	Limited Field Agent
Time Sheets	All Records	View	✓	✓	✗	✗	✗
		Create	✓	✓	✗	✗	✗
		Edit	✓	✓	✗	✗	✗
		Delete	✓	✓	✗	✗	✗
	Own Records	View	✓	✓	✓	✓	✓
		Create	✓	✓	✗	✓	✓
		Edit	✓	✓	✗	✓	✓
		Delete	✓	✓	✗	✗	✗

Feature	Actions Allowed		Admin	Dispatcher	Call Center Agent	Field Agent	Limited Field Agent
Job Sheets	All Records	View	✓	✓	✗	✗	✗
		Create	✗	✗	✗	✗	✗
		Edit	✓	✓	✗	✗	✗
		Delete	✗	✗	✗	✗	✗
	Own Records	View	✓	✓	✓	✓	✓
		Create	✗	✗	✗	✗	✗
		Edit	✓	✓	✓	✓	✗
		Delete	✗	✗	✗	✗	✗
	Download		✓	✓	✓	✓	✓
	Print		✓	✓	✓	✓	✓

Feature	Actions Allowed		Admin	Dispatcher	Call Center Agent	Field Agent	Limited Field Agent
Services And Parts	All Records	View	✓	✓	✓	✓	✓
		Create	✓	✓	✓	✗	✗
		Edit	✓	✓	✓	✗	✗
		Delete	✓	✓	✓	✗	✗
	Own Records	View	✓	✓	✓	✓	✓
		Create	✓	✓	✓	✗	✗
		Edit	✓	✓	✓	✗	✗
		Delete	✓	✓	✓	✗	✗
	Change Owner		✓	✓	✗	✗	✗

Feature	Actions Allowed		Admin	Dispatcher	Call Center Agent	Field Agent	Limited Field Agent
Assets	All Records	View	✓	✓	✓	✓	✓
		Create	✓	✓	✓	✗	✗
		Edit	✓	✓	✓	✗	✗
		Delete	✓	✓	✓	✗	✗
	Own Records	View	✓	✓	✓	✓	✓
		Create	✓	✓	✓	✗	✗

		Edit	✓	✓	✓	✗	✗
		Delete	✓	✓	✓	✗	✗
	Change Owner		✓	✓	✗	✗	✗

Feature	Actions Allowed		Admin	Dispatcher	Call Center Agent	Field Agent	Limited Field Agent
Notes	All Records	View	✓	✓	✓	✓	✓
		Create	✓	✓	✓	✗	✗
		Edit	✓	✓	✗	✗	✗
		Delete	✓	✗	✗	✗	✗
	Own Records	View	✓	✓	✓	✓	✓
		Create	✓	✓	✓	✓	✓
		Edit	✓	✓	✓	✓	✓
		Delete	✓	✓	✓	✓	✓

Feature	Actions Allowed		Admin	Dispatcher	Call Center Agent	Field Agent	Limited Field Agent
Attachments	All Records	View	✓	✓	✓	✓	✓
		Create	✓	✓	✓	✗	✗
		Edit	✓	✓	✗	✗	✗
		Delete	✓	✓	✗	✗	✗
	Own Records	View	✓	✓	✓	✓	✓
		Create	✓	✓	✓	✓	✓
		Edit	✓	✓	✓	✓	✓
		Delete	✓	✓	✓	✓	✓

Feature	Actions Allowed		Admin	Dispatcher	Call Center Agent	Field Agent	Limited Field Agent
Attendance	All Records	View	✓	✓	✗	✗	✗
		Create	✓	✓	✗	✗	✗
		Edit	✓	✓	✗	✗	✗
		Delete	✓	✓	✗	✗	✗

	Own Records	View	✓	✓	✓	✓	✓
		Create	✓	✓	✓	✓	✓
		Edit	✓	✓	✓	✓	✓
		Delete	✓	✓	✓	✓	✓
	CheckIn/CheckOut		✓	✓	✓	✓	✓

Feature	Actions Allowed		Admin	Dispatcher	Call Center Agent	Field Agent	Limited Field Agent
Invoices	All Records	View	✓	✓	✓	✗	✗
		Create	✓	✓	✓	✗	✗
		Edit	N/A	N/A	N/A	N/A	N/A
		Delete	N/A	N/A	N/A	N/A	N/A
	Own Records	View	✓	✓	✓	✓	✗
		Create	✓	✓	✓	✓	✗
		Edit	N/A	N/A	N/A	N/A	N/A
		Delete	N/A	N/A	N/A	N/A	N/A
	Download		✓	✓	✓	✓	✗
	Print		✓	✓	✓	✓	✗
	Send Invoice		✓	✓	✓	✓	✗
	Record Payment		✓	✓	✓	✓	✗

Feature	Actions Allowed		Admin	Dispatcher	Call Center Agent	Field Agent	Limited Field Agent
Payments	All Records	View	✓	✓	✓	✗	✗
		Create	✓	✓	✓	✗	✗
		Edit	✓	✓	✓	✗	✗
		Delete	✓	✓	✓	✗	✗
	Own Records	View	✓	✓	✓	✓	✗
		Create	✓	✓	✓	✓	✗
		Edit	✓	✓	✓	✓	✗
		Delete	✓	✓	✓	✓	✗
	Print		✓	✓	✓	✓	✗
	Send Receipt		✓	✓	✓	✓	✗
	Download		✓	✓	✓	✓	✗

Feature	Actions Allowed	Admin	Dispatcher	Call Center Agent	Field Agent	Limited Field Agent
Reports	View	✓	✓	✗	✗	✗
	Create	✓	✓	✗	✗	✗
	Edit	✓	✓	✗	✗	✗
	Delete	✓	✓	✗	✗	✗
	Export	✓	✓	✗	✗	✗
	Send Email	✓	✓	✗	✗	✗

Feature	Admin	Dispatcher	Call Center Agent	Field Agent	Limited Field Agent
Scheduled Maintenances	✓	✓	✗	✗	✗

Feature	Actions Allowed	Admin	Dispatcher	Call Center Agent	Field Agent*	Limited Field Agent
WhatsApp	View	✓	✓	✓	✓	✗
	Send Messages	✓	✓	✓	✓	✗
	Assign/Pickup Messages	✓	✓	✓	✗	✗

*Only for Own Records

This permission will be listed only if the WhatsApp integration is enabled

General Permissions

Feature	Admin	Dispatcher	Call Center Agent	Field Agent	Limited Field Agent
Organization Details	✓	✓	✓	✓	✓
Business Hours	✓	✓	✓	✓	✓
Holidays	✓	✓	✓	✓	✓
Currencies	✓	✓	✓	✓	✓

Field Service Operations

Feature	Admin	Dispatcher	Call Center Agent	Field Agent	Limited Field Agent
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Allow user to access FSM via web	✓	✓	✓	✓	✗
Use as Field Agent	✓	✓	✗	✓	✓
Show Pricing	✓	✓	✓	✓	✗

Work Force Management

Feature	Admin	Dispatcher	Call Center Agent	Field Agent	Limited Field Agent
Service Report Customization	✓	✗	✗	✗	✗

Feature	Actions Allowed		Admin	Dispatcher	Call Center Agent	Field Agent	Limited Field Agent
Time Off	All Records	View	✓	✓	✗	✗	✗
		Create	✓	✓	✗	✗	✗
		Edit	✓	✓	✗	✗	✗
		Delete	✓	✓	✗	✗	✗
	Own Records	View	✓	✓	✓	✓	✓
		Create	✓	✓	✓	✓	✓
		Edit	✓	✓	✗	✗	✗
		Delete	✓	✓	✗	✗	✗

Feature	Actions Allowed		Admin	Dispatcher	Call Center Agent	Field Agent	Limited Field Agent
Crew	All Records	View	✓	✓	✓	✓	✓
		Create	✓	✗	✗	✗	✗
		Edit	✓	✗	✗	✗	✗
		Delete	N/A	N/A	N/A	N/A	N/A
	Own Records	View	✓	✓	✓	✓	✓
		Create	✓	✗	✗	✗	✗
		Edit	✓	✗	✗	✗	✗
		Delete	N/A	N/A	N/A	N/A	N/A

Feature	Actions Allowed	Admin	Dispatcher	Call Center Agent	Field Agent	Limited Field Agent
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Territories	All Records	View	✓	✓	✓	✓	✓
		Create	✓	✓	✗	✗	✗
		Edit	✓	✓	✗	✗	✗
		Delete	N/A	N/A	N/A	N/A	N/A
	Own Records	View	✓	✓	✓	✓	✓
		Create	✓	✓	✗	✗	✗
		Edit	✓	✓	✗	✗	✗
		Delete	N/A	N/A	N/A	N/A	N/A

Feature	Actions Allowed		Admin	Dispatcher	Call Center Agent	Field Agent	Limited Field Agent
Skills	All Records	View	✓	✓	✓	✓	✓
		Create	✓	✓	✗	✗	✗
		Edit	✓	✓	✗	✗	✗
		Delete	✓	✓	✗	✗	✗
	Own Records	View	✓	✓	✓	✓	✓
		Create	✓	✓	✗	✗	✗
		Edit	✓	✓	✗	✗	✗
		Delete	✓	✓	✗	✗	✗

Feature	Actions Allowed		Admin	Dispatcher	Call Center Agent	Field Agent	Limited Field Agent
User Management	Add User		✓	✓	✗	✗	✗
	Remove User		✓	✓	✗	✗	✗
	Change Profile		✓	✓	✗	✗	✗

Feature	Actions Allowed		Admin	Dispatcher	Call Center Agent	Field Agent	Limited Field Agent
Users	All Records	View	✓	✓	✓	✗	✗
		Edit	✓	✓	✗	✗	✗
	Own Records	View	✓	✓	✓	✓	✓
		Edit	✓	✓	✗	✗	✗
	Manage Territory		✓	✓	✗	✗	✗

	Manage Skill	✓	✓	✗	✗	✗
--	--------------	---	---	---	---	---

Feature	Actions Allowed		Admin	Dispatcher	Call Center Agent	Field Agent	Limited Field Agent
User Location	All Records	View	✓	✓	✗	✗	✗
		Create	✓	✓	✗	✗	✗
		Edit	✓	✓	✗	✗	✗
		Delete	✓	✓	✗	✗	✗
	Own Records	View	✓	✓	✓	✓	✓
		Create	✓	✓	✓	✓	✓
		Edit	✓	✓	✓	✓	✓
		Delete	✓	✓	✓	✓	✓

Feature	Actions Allowed		Admin	Dispatcher	Call Center Agent	Field Agent	Limited Field Agent
Equipments	All Records	View	✓	✓	✓	✓	✓
		Create	✓	✓	✗	✗	✗
		Edit	✓	✓	✗	✗	✗
		Delete	✓	✓	✗	✗	✗
	Own Records	View	✓	✓	✓	✓	✓
		Create	✓	✓	✗	✗	✗
		Edit	✓	✓	✗	✗	✗
		Delete	✓	✓	✗	✗	✗

Admin Permissions

Feature	Admin	Dispatcher	Call Center Agent	Field Agent	Limited Field Agent
Modules Customization	✓	✗	✗	✗	✗
Module Mapping	✓	✗	✗	✗	✗
Status Settings	✓	✗	✗	✗	✗
Other Settings	✓	✗	✗	✗	✗
Email Template	✓	✗	✗	✗	✗
Sender Email	✓	✗	✗	✗	✗
Manage Custom Views	✓	✓	✗	✗	✗

Customer Dashboard	✓	✗	✗	✗	✗
Notifications	✓	✓	✗	✗	✗
Work Types	✓	✓	✗	✗	✗
Dispatch Console	✓	✓	✗	✗	✗

Feature	Actions Allowed	Admin	Dispatcher	Call Center Agent	Field Agent	Limited Field Agent
Billing Integration	Taxes	✓	✗	✗	✗	✗
	Two way sync	✓	✗	✗	✗	✗
	Two way sync logs	✓	✗	✗	✗	✗
	Fields Mapping	✓	✗	✗	✗	✗

Feature	Actions Allowed	Admin	Dispatcher	Call Center Agent	Field Agent	Limited Field Agent
Record Template	View	✓	✓	✓	✓	✓
	Create	✓	✓	✗	✗	✗
	Edit	✓	✓	✗	✗	✗
	Delete	✓	✓	✗	✗	✗

Feature	Actions Allowed	Admin	Dispatcher	Call Center Agent	Field Agent	Limited Field Agent
PDF Templates	View	✓	✓	✓	✓	✓
	Create	✓	✓	✗	✗	✗
	Edit	✓	✓	✗	✗	✗
	Delete	✓	✓	✗	✗	✗

Feature	Actions Allowed	Admin	Dispatcher	Call Center Agent	Field Agent	Limited Field Agent
Service Reports	All Records	View	✓	✓	✓	✗
		Create	✓	✓	✗	✗
		Edit	✓	✗	✗	✗
		Delete	✓	✗	✗	✗
	Own Records	View	✓	✓	✓	✓
		Create	✓	✓	✓	✓

		Edit	✓	✓	✗	✗	✗
		Delete	✓	✓	✗	✗	✗
	Send		✓	✓	✓	✓	✓
	Mark As Sent		✓	✓	✓	✓	✓

Manage Automations

Feature	Admin	Dispatcher	Call Center Agent	Field Agent	Limited Field Agent
Manage Automation	✓	✗	✗	✗	✗

Bulk Actions

Feature	Admin	Dispatcher	Call Center Agent	Field Agent	Limited Field Agent
Mass Delete	✓	✗	✗	✗	✗

Data Administration

Feature	Admin	Dispatcher	Call Center Agent	Field Agent	Limited Field Agent
Import Data	✓	✗	✗	✗	✗
Export Data	✓	✗	✗	✗	✗

Developer Permissions

Feature	Admin	Dispatcher	Call Center Agent	Field Agent	Limited Field Agent
Zoho FSM API access	✓	✓	✓	✓	✗
Function as REST API	✓	✓	✓	✓	✗
Notification API	✓	✓	✓	✗	✗
Webforms	✓	✓	✗	✗	✗

Permissions Implications

Show Pricing

Use the [Show Pricing](#) profile permission to determine whether the user will be able to see the prices of Services and Parts in the web and mobile app. If you disable the Show Pricing profile permission, in the Create, Edit, and

View screens of Work Orders and Service Appointments, the prices of Services and Parts will not be displayed.

Show Pricing enabled

FSM

Home

Customers

Work Order Management

Dispatch Console

Services And Parts

Assets

Standard Trial
Upgrade

Work Orders

WO1

Clogged pipe

Scheduled Appointment

Medium

Service

Not yet Invoiced

Jane Rizzoli

Cancel

Edit

Work Order Details

Requests

Estimates

Parent Work Order

Company & Contact

Zylker Corp

Mr. Edward Cormoran

edward.cormoran@zylker.com

Asset

Asset

Address

Territory Zylker

Service Address

125 I St

Sacramento, California, 95814,

United States

Timeline

Service and parts

Appointments

Notes

Related list

Invoices

Services

Service Line Item Name	Service	Quantity	List Price	Line Item Amount
SVC-1	Plumbing	1 Hours	\$ 50	\$ 50
	--			
	Scheduled			
	Not yet Invoiced			

Parts

Part Line Item Name	Part	Quantity	List Price	Line Item Amount
PRT-1	Plunger	1 Each	\$ 30	\$ 30
	--			
	Service Line Item			
	SVC-1			

Sub Total

Discount

Adjustment

Grand Total

\$ 80

--

--

\$ 80

Show Pricing disabled

FSM

Home

Customers

Work Order Management

Services And Parts

Assets

Workforce

Standard Trial
Upgrade

Work Orders

WO1

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Sacramento, California, 95814,

United States

Timeline

Service and parts

Appointments

Notes

Related list

Invoices

Services

Service Line Item Name	Service	Quantity
SVC-1	Plumbing	1 Hours
	--	
	Scheduled	
	Not yet Invoiced	

Parts

Part Line Item Name	Part	Quantity
PRT-1	Plunger	1 Each
	--	
	Service Line Item	
	SVC-1	

Show Pricing enabled

Show Pricing disabled

← W01

OVERVIEW SERVICE AND PARTS SERVICE TA

Service Line Items

Plumbing - 1 Hours \$ 50.00

New

Part Line Items

Plunger - 1 Each \$ 30.00

Summary

Sub Total \$ 80.00

Discount -

Adjustment -

Grand Total \$ 80.00

← W01

OVERVIEW SERVICE AND PARTS SERVICE TA

Service Line Items

Plumbing - 1 Hours

Scheduled

Part Line Items

Plunger - 1 Each

Custom Profiles

With custom profiles, you can create user-defined profiles of your choice. You will be able to create custom profiles by cloning existing profiles and changing its permissions as per your requirements. The standard profiles in FSM provide a diverse array of roles that you can assign to your users. However you might still need to create user profiles that are specific to your organization and business needs. E.g. in small businesses, people perform overlapping duties. The same person might want to perform the role of a Field Agent as well as a Dispatcher. In this case, you can clone the Field Agent profile and then enable the Dispatch Console permission.



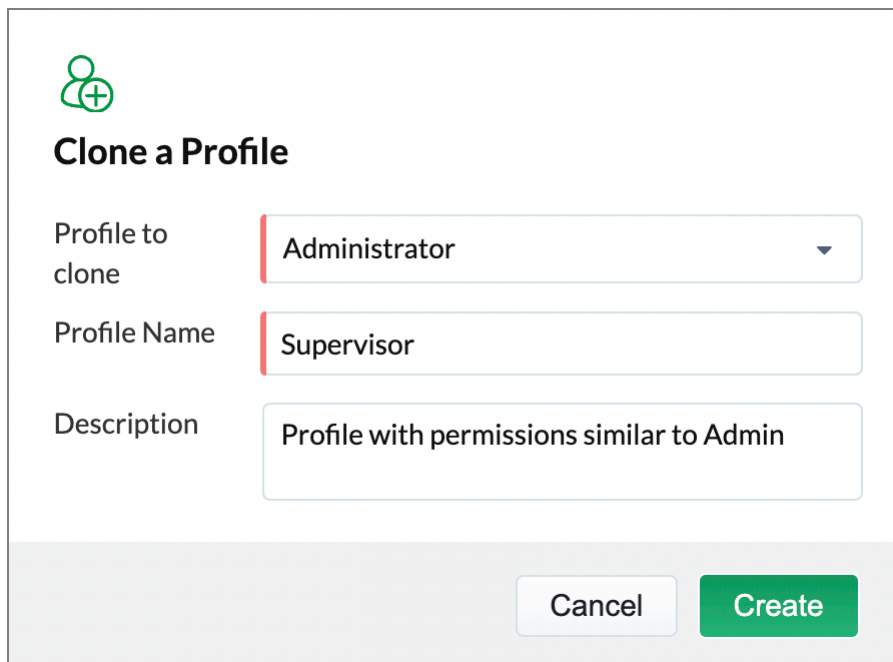
Available in Editions: **Standard, Professional**

Create Custom Profiles

- ❗ - **Permission Required:** Administrator profile
- Find out the Edition-specific limits for [Custom Profiles](#).

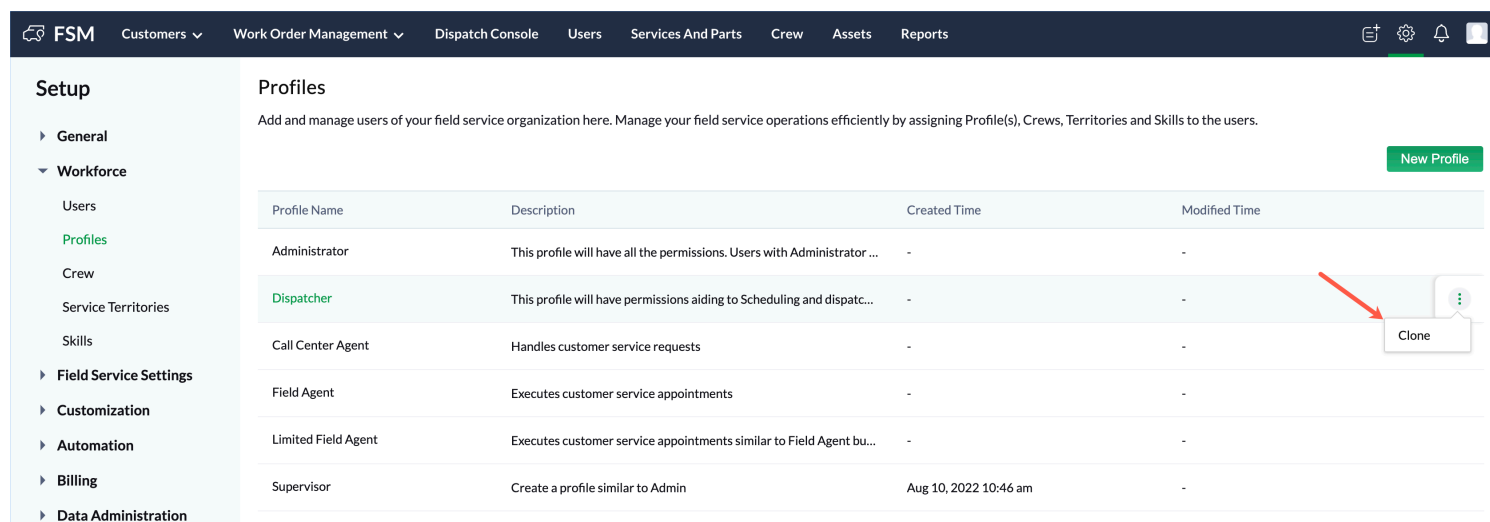
To create a custom profile:

1. Navigate to **Setup > Security Control > Profiles** and click **New Profile**.
2. In the *Clone a Profile* popup, perform the following actions, and click **Create**:
 - a. Select the **Profile to clone**.
 - b. Enter a **Profile Name**.
 - c. Enter a **Description**.



The image shows a 'Clone a Profile' popup window. It has a title bar with a green icon of two people and a plus sign. The main title is 'Clone a Profile'. Below the title, there are three input fields: 'Profile to clone' with a dropdown menu showing 'Administrator', 'Profile Name' with a text input field containing 'Supervisor', and 'Description' with a text input field containing 'Profile with permissions similar to Admin'. At the bottom of the popup, there are two buttons: 'Cancel' and 'Create'.

The clone option will also be available under more options [:] of a profile. This will be visible when you hover over a profile entry.



The image shows a screenshot of the FSM (Field Service Management) interface. The top navigation bar includes 'FSM', 'Customers', 'Work Order Management', 'Dispatch Console', 'Users', 'Services And Parts', 'Crew', 'Assets', and 'Reports'. The left sidebar shows a 'Setup' menu with options like 'General', 'Workforce', 'Users', 'Profiles', 'Crew', 'Service Territories', 'Skills', 'Field Service Settings', 'Customization', 'Automation', 'Billing', and 'Data Administration'. The main content area is titled 'Profiles' and contains a table of profiles. A red arrow points to a 'Clone' button in the context menu of the 'Dispatcher' profile.

Profile Name	Description	Created Time	Modified Time
Administrator	This profile will have all the permissions. Users with Administrator ...	-	-
Dispatcher	This profile will have permissions aiding to Scheduling and dispatc...	-	-
Call Center Agent	Handles customer service requests	-	-
Field Agent	Executes customer service appointments	-	-
Limited Field Agent	Executes customer service appointments similar to Field Agent bu...	-	-
Supervisor	Create a profile similar to Admin	Aug 10, 2022 10:46 am	-

Note: Refer to the [pricing page](#) for details regarding the number of custom profiles you can create.

Edit Custom Profiles

To edit a custom profile:

1. Navigate to **Setup > Workforce > Profiles** and click the profile you want to edit.
2. Make the required changes and click **Save**.

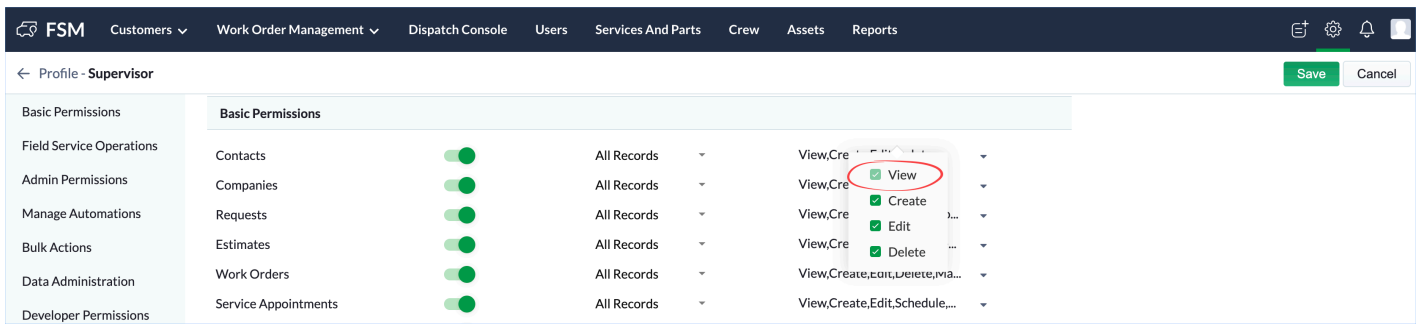
Basic Permissions			
Contacts	<input checked="" type="checkbox"/>	All Records	View,Create,Edit,Delete
Companies	<input checked="" type="checkbox"/>	All Records	View,Create,Edit,Delete
Requests	<input checked="" type="checkbox"/>	All Records	View,Create,Edit,Delete,Co...
Estimates	<input checked="" type="checkbox"/>	All Records	View,Create,Edit,Delete,Se...
Work Orders	<input checked="" type="checkbox"/>	All Records	View,Create,Edit,Delete,Ma...
Service Appointments	<input checked="" type="checkbox"/>	All Records	View,Create,Edit,Schedule...
Service Reports	<input checked="" type="checkbox"/>	All Records	View,Create,Edit
Trips	<input checked="" type="checkbox"/>	All Records	View,Create
Time Sheets	<input checked="" type="checkbox"/>	All Records	View,Create,Edit,Delete
Services And Parts	<input checked="" type="checkbox"/>	All Records	View,Create,Edit,Delete
Assets	<input checked="" type="checkbox"/>	All Records	View,Create,Edit,Delete
Time Off	<input type="checkbox"/>		
Crew	<input checked="" type="checkbox"/>	All Records	View,Create,Edit,Delete
Territories	<input checked="" type="checkbox"/>	All Records	View,Create,Edit

Permission Restrictions

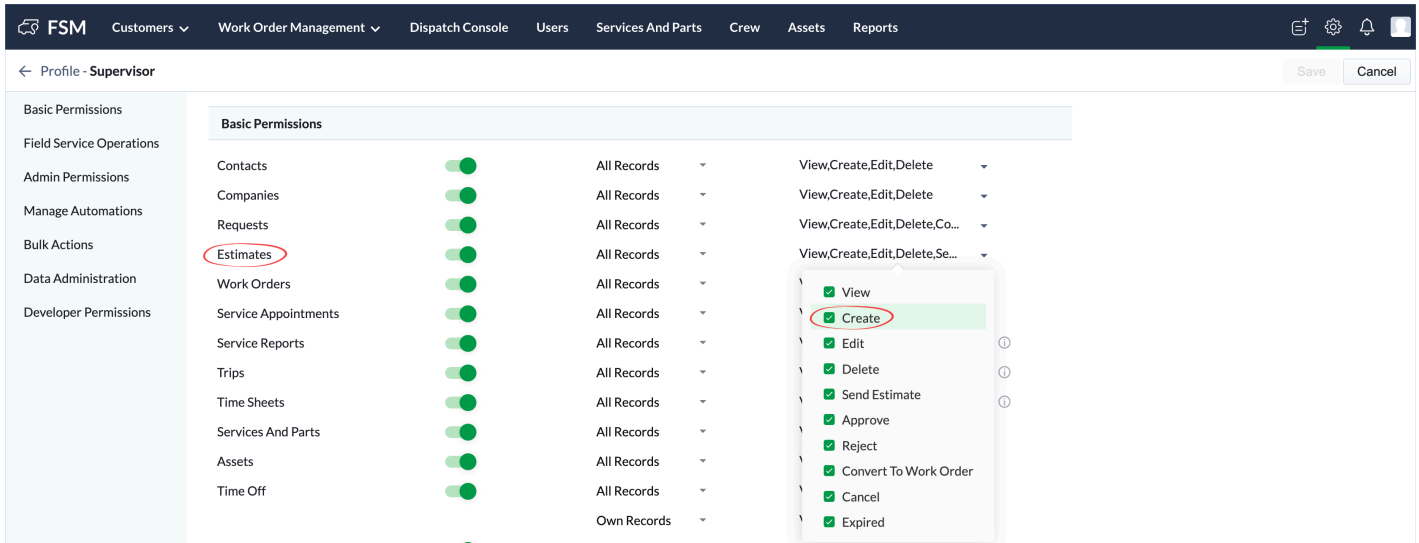
While editing a profile, you will come across certain [permission](#) restrictions. These permission-related restrictions have been listed below.

1. In the following permissions, **View** cannot be disabled:

- Contacts
- Companies
- Work Orders
- Service Appointments
- Service Reports
- Trips
- Time Sheets
- Services And Parts
- Crew
- Territories
- Skills
- Notes

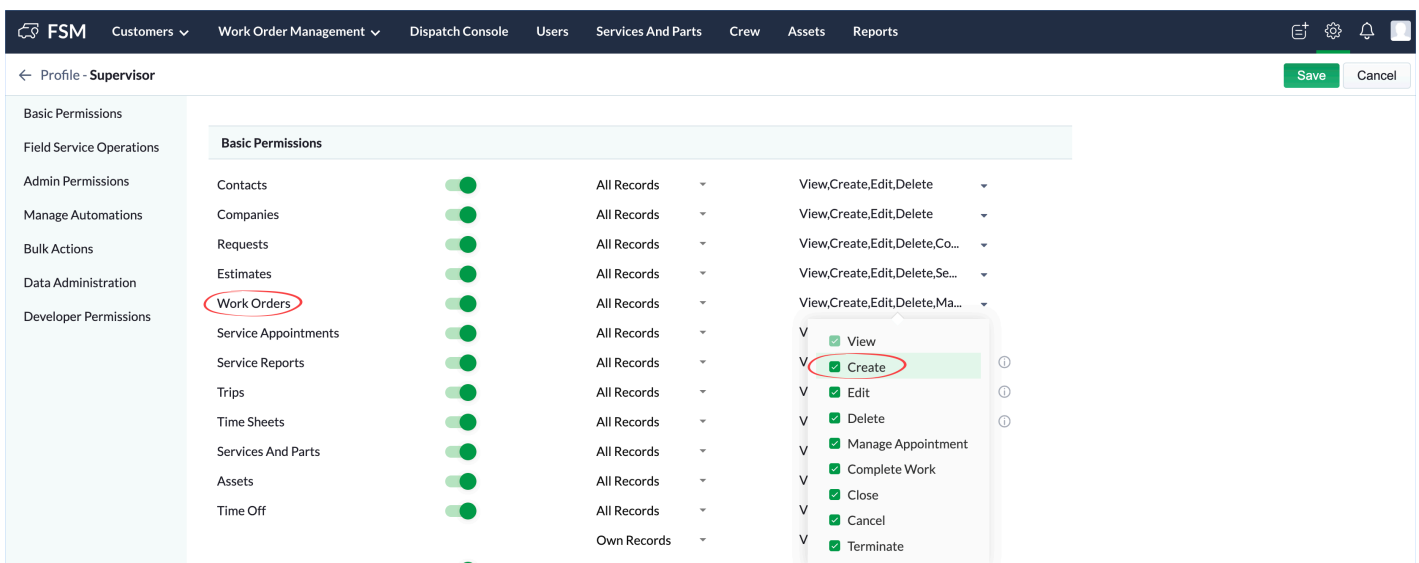


2. If you disable **Create** from **Estimates** permission, then **Convert to Estimate** will be disabled from **Requests** permission.

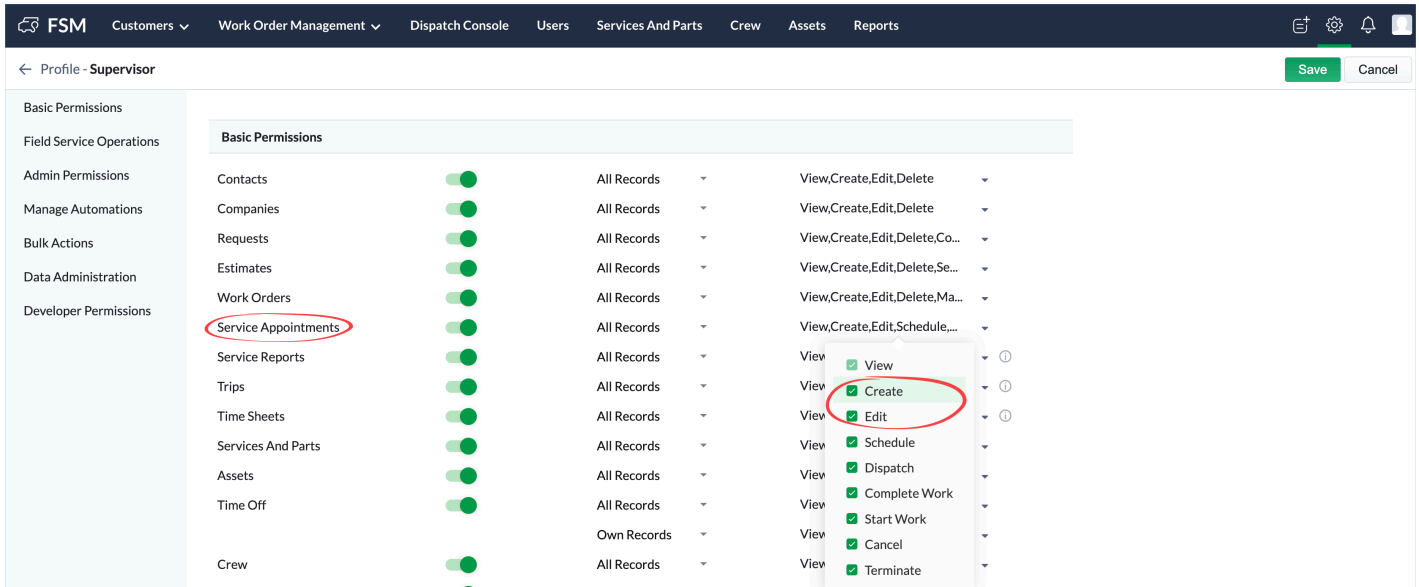


3. If you disable **Create** for **Work Orders** permission, then the following will be disabled:

- **Convert to Work Order** in **Requests**, and **Estimates** permissions
- **Dispatch Console**

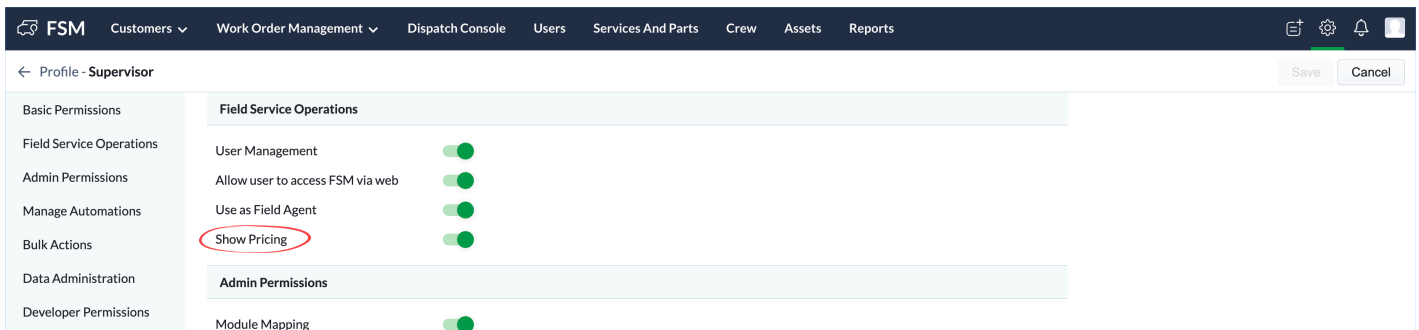


4. If you disable **Create** or **Edit** for **Service Appointments** permission, then **Dispatch Console** permission will be disabled.

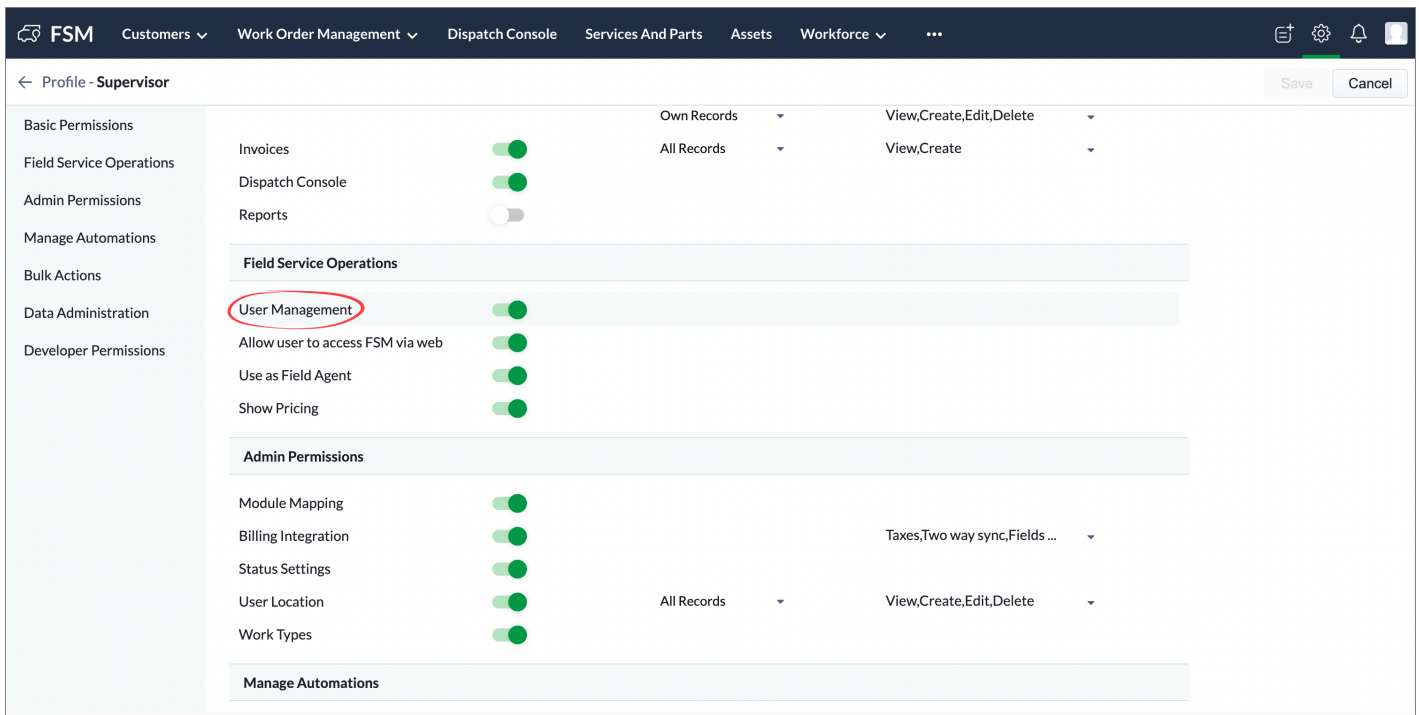


5. If you disable the **Show Pricing** permission, the following will be disabled:

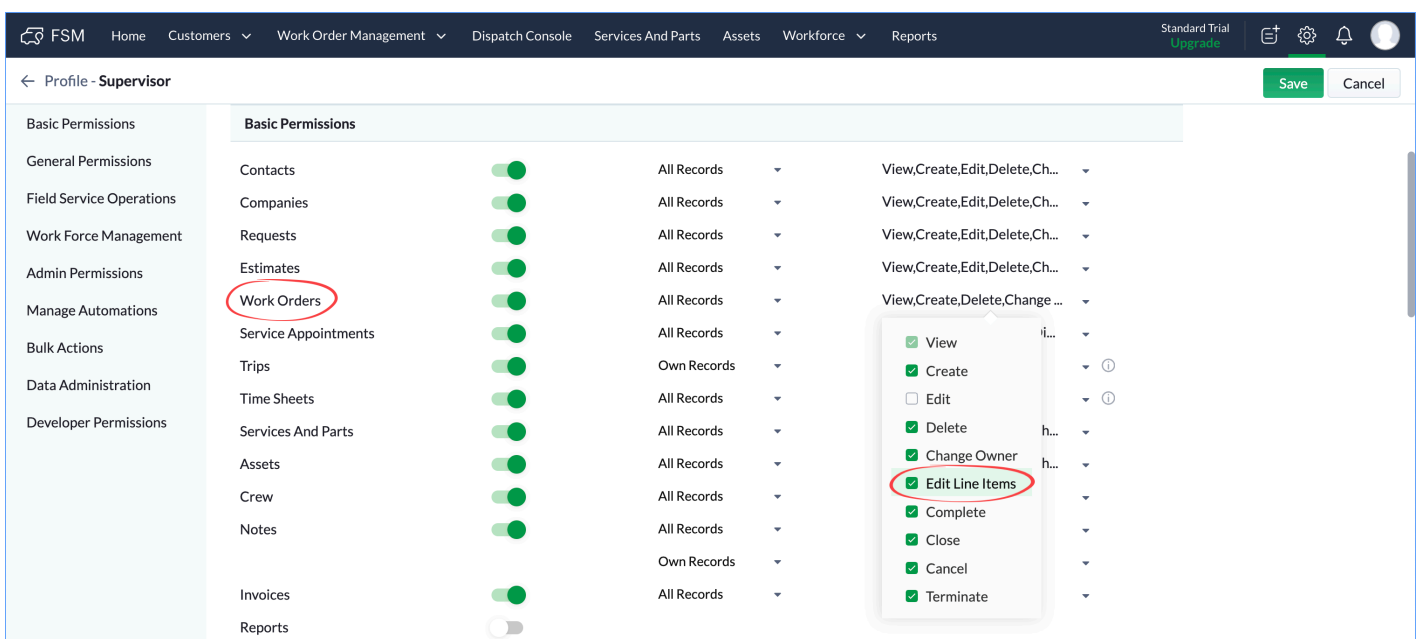
- **Create** in the **Requests, Estimates, Services And Parts, Invoices** permissions
- **View** in the **Invoices, Reports, Scheduled Maintenances** permissions
- **Send Estimate** in **Estimates** permission
- **Download, Print, Record Payment, Send Invoice** in **Invoices** permission
- **Export** permission
- **Webforms** permission



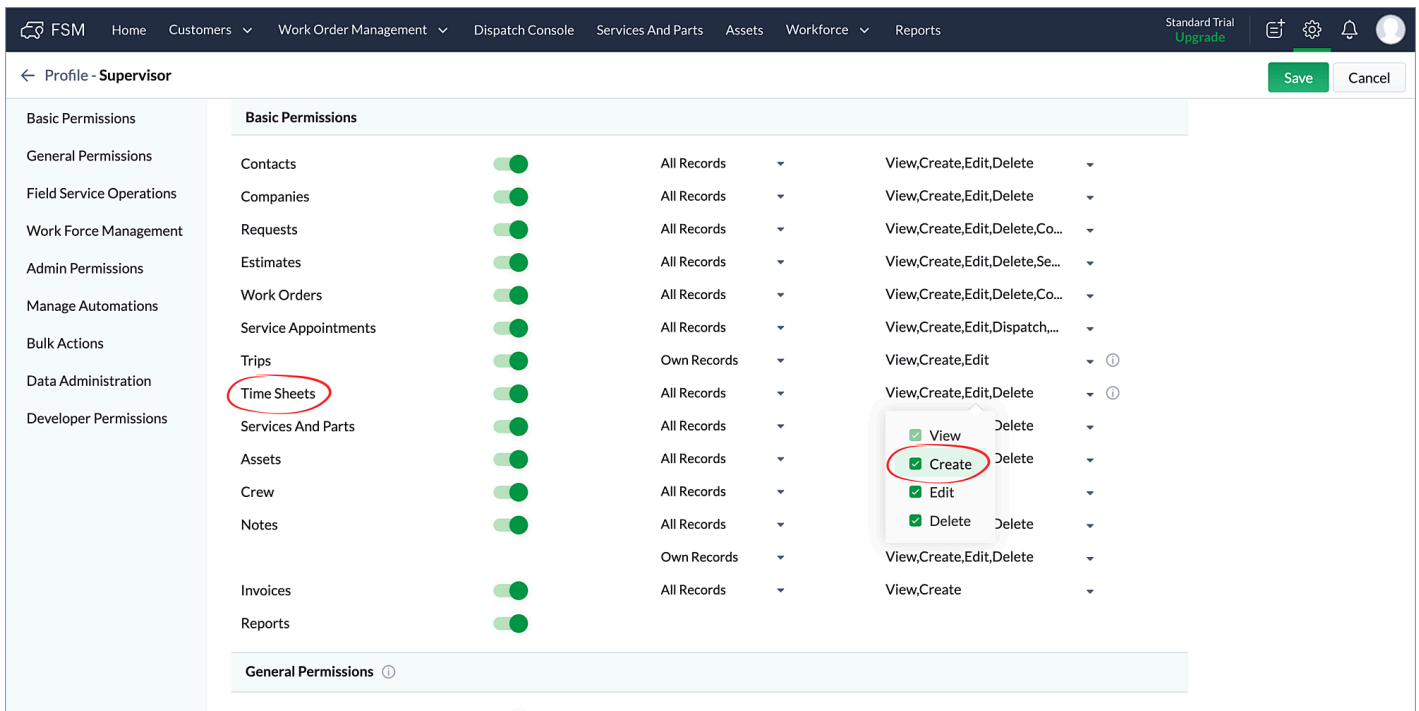
6. If you disable the **User Management** permission, then **Create, Edit** in the **Crew** permission will be disabled.



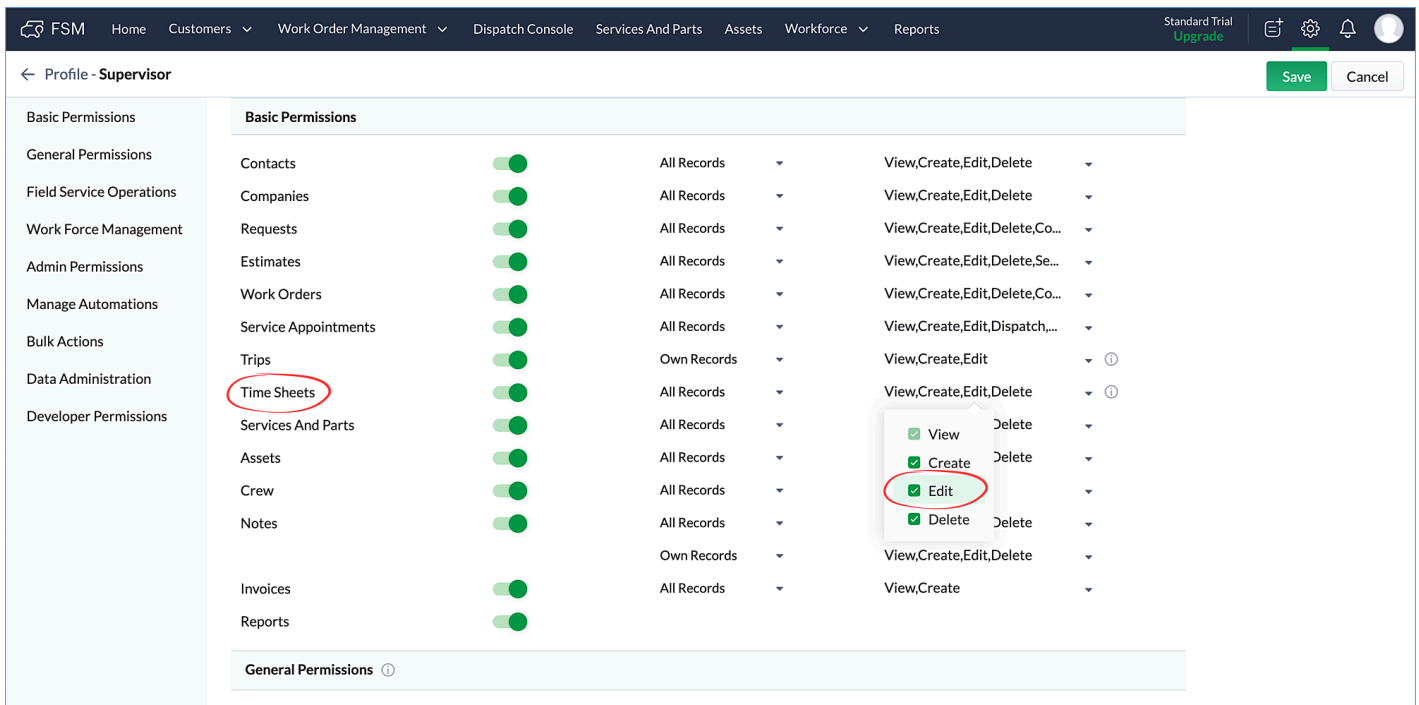
7. If you disable **Edit Line Items** for the **Work Orders** permission, then **Edit** in the **Service Appointments** permission will be disabled.



8. If you disable **Create** for the **Time Sheets** permission, then **Start Work** in the **Service Appointments** permission will be disabled. Conversely, if you disable **Start Work** for the **Service Appointments** permission, the **Create** in the **Time Sheets** permission will be disabled.



9. If you disable **Edit** for the **Time Sheets** permission, then **Complete Work** in the **Service Appointments** permission will be disabled. Conversely, if you disable **Complete Work** for the **Service Appointments** permission, the **Edit** in the **Time Sheets** permission will be disabled.



Using Custom Profiles

The created custom profiles can be selected when you [create](#) a user.

Add User



First Name

Last Name

Email

Profile

Call Center Agent

Dispatcher

Field Agent

Limited Field Agent

Supervisor

Cancel

Save