Zoho Corporation

Service Appointments

Service appointments are jobs created for carrying out the services in a work order. These service appointments are assigned to field agents or crew who will then perform the services at the contact location. As many service appointments as the services in the work order can be created. The service appointments can be viewed under the **Service Appointments** module. Service appointments can be created and managed here. Appointments can also be created from within a <u>work order</u>.

Available in Editions: All Editions

Create Service Appointments

- (i) Permission Required: <u>Service Appointments</u>
 - Find out the Edition-specific limits for Service Appointments.

To create a service appointment:

- 1. Select Service Appointments from the Work Order Management menu and click Create.
- 2. Select the work order that you want to create the service appointment for.

Create Appointment	\times
Choose WorkOrder Select	
Name Search	
WO1 - Sundry repairs ■ Scheduled Appointm S Medium Ø Service ⑧ Lucy Robins In ABC Services ● -None-	
WO2 - Dripping faucet ● Closed Ø Service ⑧ Lucy Robins	
WO4 - Plumbing works ● Closed Ø Service ⑧ Lucy Robins 교 ABC Services ● Invoiced	
WO7 - End of lease cleaning ● Dispatched ● Medium Ø Service ⑧ Lucy Robins B ABC Services ● -None-	
WO8 - Leaking faucet	

The details of the selected work order are displayed.

Create Appointment					×
Choose WorkOrder	WO48- Sundry works		Ø		
	Work Order Details WO48 Sundry works New Ø Service 🖬 D	Daniel Warne			
Service	AC Installation(SVC-1) Leakage repair(SVC-1)	08) 09)	× ×		
Summary	Sundry works				
Currency	USD		•		
Exchange Rate	1				
Asset	Search Asset				
Scheduled Start Date Time	MMM DD, YYYY	hh:mm A		(GMT -07.00)	
Scheduled End Date Time	MMM DD, YYYY	hh:mm A		(GMT -07.00)	
Service Resource	Select		•		
				Cancel	ule ~

- 3. Enter the following details, then click **Schedule**:
 - a. The values for Scheduled Start Date Time and Scheduled End Date Time. The Scheduled Start Date Time and Scheduled End Date Time should be within the same day. Use <u>multi-day scheduling</u> to schedule an appointment spanning multiple days.
 - b. A Service Resource (Agent or Crew)

One or more resources can be assigned to the appointment. Only when the **Scheduled Start/End Date Time** is selected will the service resources be listed.

The following agents or crews will be available for assignment:

- Active <u>agents</u> or <u>crew</u>s assigned to the territory that is chosen in the work order

- The agents and crews who are active in the territory between the **Scheduled Start Date Time** and **Scheduled End Date Time**

Create Appointment				×
Service	Move out carpet cleaning (S New, Quantity: 1	;VC-23) ×	 • 	
Summary	End of lease cleaning			
Asset				
Scheduled Start Date Time	Nov 04, 2022	05:30 PM		(GMT -07.00)
Scheduled End Date Time	Nov 04, 2022	06:30 PM		(GMT -07.00)
Service Resource	Select		-	
	Agent - C Searc	h		
	Available Agents William Turner			
	Unavailable Agents Daniel Warne			
	Ross Smith Currently part of a crew			
				Cancel Schedule ~

Hover over the name of an unavailable agent to know the reason for their unavailability.

4. Click **Confirm** in the confirmation message.



The service appointment details page will be displayed. This page will display the name of the work order for which the service appointment has been created. You can also dispatch, reschedule, terminate, and Cancel an appointment from this page.

Cジ FSM Customers ~ Work O	rder Management 🗸 🛛 Dispatch Co	nsole Services And Parts	Assets Repo	rts					et 🅸	¢ 🖸
Service Appointments > WO48 > AP-4 Sundry works Scheduled W Emily Raymond	9						~		Dispatch 🗸	Edit
SA Information	- Timeline Service ar	d parts Time sheets	Service report	Trips	Notes			Canc	.el	
③ Service(s)								Term	inate	
AC Installation (SVC-108)	Services							Resc	hedule	
Leakage repair (SVC-109)	Service Line Item Name	Service	Quantity	List Price	Discount	Tax Name	Line Item Amount			
Scheduled Time	SVC-108	AC Installation	1	\$ 150		Sales tax [7%]	\$ 160.5			
May 26, 2022 11:00 AM (GMT -07:00) May 26, 2022 12:00 PM (GMT -07:00)	O In Progress ₽ None									
🗇 Actual Time	SVC-109	Leakage repair	1 Hours	\$ 150		Sales tax [7%]	\$ 160.5			
Appointment not yet started	↔ In Progress									
Assigned Resources	Er None									
Emily Raymond (Lead)	Parts									
Other Details	Part Line Item Name	Part	Quantity	List Price	Discount	Tax Name	Line Item Amount			
D. Company Nebula	PRT-112	2 Ton 5 Star Split AC	1 Ouantity	\$ 200		Sales tax [7%]	\$ 214			
Contact Lucy Robins		 Service Line Item	Quantity							
😤 Asset		SVC-108								
🛱 Due Date	PRT-113	Waterproof Tile Gap Filler	1 Pack	\$ 20		Sales tax [7%]	\$ 21.4			
Due Dute		 Service Line Item								
Address Details	•	SVC-109								
💮 Territory Westbrook										
Service Address					Sub	Total	\$ 520			
Service Address 9219 N Lindbergh Drive					Adju	stment	⊅ 30.4 			
Peoria, IL, 61104, United States of America					Tata		trr/			
					iota		900 ¢			~
Chats Contacts Here is	syour Smart Chat (Ctrl+Space)									e

The appointment created can also be viewed under the **Appointments** tab of the work order for which the service appointment has been created. Under the **Service and parts** tab of the work order, you can see the appointment created for each service line item. Hover over the appointment icon [] next to the **Service Line Item Name** to see the appointment details. Click to navigate to the *Appointment Details* screen.

Cふ FSM Customers ~ Work Order Mar	nagement 🗸 🛛 Dispatch C	onsole Services And Parts	Assets Repo	rts	
Work Orders > WO48 Sundry works Scheduled Appointment Ø Service -None-	📽 Daniel Warne				
Work Order Details	Timeline Service a	and parts Appointments	Notes Re	elated list	Invo
 Requests Estimates 	Services				
🗟 Parent Work Order 🛛	Service Line Item Name	e Service	Quantity	List Price	Dis
Company & Contact	SVC-108 O In Progr None AP-49 Sch Sundry wor	AC Installation	1	\$ 150	
Nebula Nebula Ms. Lucy Robins	SVC-109	Leakage repair 	1 Hours	\$ 150	
Iucy.robins@zylker.com	Parts				
Ascet	Part Line Item Name	Part	Quantity	List Price	Dis
🛞 Asset	PRT-112	2 Ton 5 Star Split AC	1 Quantity	\$ 200	
Address -		SVC-108			
🛞 Territory Westbrook	PRT-113	Waterproof Tile Gap Filler	1 Pack	\$ 20	
Service Address					

Creating Service Appointment for a Service

You can create a service appointment for a work order or for the individual services. Appointments for the services can be created as explained below:

To create a service appointment for a service line item:

- 1. Follow steps 1-2 mentioned <u>above</u>.
- 2. Enter the following details, then click **Schedule**:
 - a. In the **Service** field, retain the services or <u>service tasks</u> you want to create the appointment for.
 - b. The values for Scheduled Start Date Time and Scheduled End Date Time.
 The Scheduled Start Date Time and Scheduled End Date Time should be within the same day.
 Use <u>multi-day scheduling</u> to schedule an appointment spanning multiple days.
 - c. A Service Resource (Field Agent or Crew)

One or more resources can be assigned to the appointment.

Create Appointment					×
Select WorkOrder	WO2	×			
Service	AC Installation(SVC-2) Leakage repair(SVC-3)		×		
Summary	Sundry works				
Asset	Search Asset				
Scheduled Start Date Time	Apr 12, 2022	12:00 PM			
Scheduled End Date Time	Apr 12, 2022	01:00 PM			
Service Resource	Alan Conway	:	× •		
				Cancel	Schedule V

Once service appointments have been created for all the service line items of a work order, then new service appointments can be created only after the existing ones have been cancelled or terminated. In this scenario, a message will be displayed as shown in the screenshot below.

Create Appointment					×
Select WorkOrder	WO2		×		
		No service available			

Multi-Appointment Scheduling

At a time, you can schedule multiple service appointments from the work orders. This option is available in the Maps view of the Dispatch Console.

To schedule multiple appointments:

- 1. Navigate to the **Dispatch Console** module and click the **Maps** tab.
- 2. Click the **Work Orders** filter.
- 3. Filter the work orders by the **New** Status.



To filter the work orders, click **Edit** next to **Filtered By**.

र्ट्र FSM Home Customers ~ Work 🤇	Order Management 🧹 🛛 Dispatch Cc	onsole Services And Parts	Assets Workforce ~	Reports Professiona	ITrial • Upgrade 🕂 🕸 🗘 🌔	
Gantt Maps Calendar						
č.	Щ. //			Ő	W Mary St 😤 E Mary St	
Work Orders ×	💼 Service Appointments 🔔 Servi	ce Resources Spruce Ave Harmony E	Spruce Ave		Selden St	C 🖸 a
Filtered By		Rotary Park	O'Reilly Auto P	D334	Osage St OSF HealthCare - Medical Group	ę
All Work Orders	-wi	Losey St	ey St	W Losey St	E Losey St	
Q Search from list	Calvary Assembly		arston A hawkin:	lark St- taple Av taple Av	4 Kellog 4 Prairle 4 Cherry 4 Cherry 4 Cedar 4	F Grove S
WO344 Scheduled Appointment	z	Community of Christ (Reorganized Church	Ave son Ave	N:Her	Smol	kin' Wil Barbec
Landscaping services for Acme Inc.	Linw		W. North St	Ider		
Preferred Date : Jan 18, 2024	G&M/Distributors Inc O	W North St	N An	9 W Nort 0 WO335	Kehoe Eye Care E North St	E North SI
Billing Address, 735 W Main St, Galesburg, Illinois, United		A Z	Highi	0333 Inut dar dar	W Water St E Water St	2
5/8/63, 01+01	Ford of Galesburg 🝚 🗰	W Ferris St	Nature's Treatme	333 arfie	Innkeeper's Fresh 😋	Cname
WO342 Scheduled Appointment	trict	Steele Elementary School	Galesbu	urg 💙 🏒 West K Mart 🛡	Casey's Roasted Coffee	oers s
Landscaping services for Acme Inc.	W-Main St		V Main St W Main St	2 WiMain St	Landmark Café	EM
Preferred Date : Jan 17, 2024	Galesburg Memorial	East Linwood &	Dieteri Arthu 🕘 wo	330 Cedar Creen		
Billing Address, 735 W Main St, Galesburg, Illinois, United States, 61401	Park Cemetery		IF.Ave-	El Jarochito	ي Cornucopia Natural مراجع المحقق المحق ومحقق المحقق المحقق المحق المحقق ا محقق المحقق المحق المحقق المحقق المحقق المحقق محقق محقق محقق محقق محقق محقق محقق	
Si		Gra	ham Park	Quick Sam's	Galesburg	₽
WO343 New :	34			W South St	W South St E South St Appliance S	illon's (ervice
Landscaping services for Acme Inc.	Out the Own to	Taco H	lideout 💔 🕠 Berrien St	olton	E Berrien St	
Preferred Date : Jan 17, 2024	Cedar Creek		Knox Discount	outh Blvd K	nox College 7th Wa	ard Tan
Billing Address, 735 W Main St, Galesburg, Illinois, United States, 61401	Ilpea Industries 오	Ulson Packaging	Liquor And Beer	Monmow Brooks St	Depot ⁵	S Cha
	ctional Center 🕶	Naeir De	esert Down Ranch Wear 🔤	W Knox St	E Knox St	mbers
WO341 Scheduled Appointment			Galesburg Electric/	(C)		+ 2
Total Records: 344	WestRoc	k♥	industrial Supply, Inc.	▼ w ist St	Ro	ol 🔜 : 1
Google		Shady Hill Saloon		W 2nd St fto	(auboard shortquite, Map data @2024, Terms, Report a m	

4. Hold the **Command** (for Mac) / **Ctrl** (for Windows) key and click on the markers for the work order for which you want to create the service appointments and click **Schedule Appointment**.

The selected markers will be indicated as \bigcirc or \bigcirc or \bigcirc or \bigcirc . The selected work orders will be listed in the left panel. You can select a maximum of 10 work orders.



5. Select the desired scheduled dates, assign the service resources, and click **Schedule** or **Schedule and Dispatch**.

By default, the schedule dates will be prepopulated based on the <u>Business Hours</u>. If business hours are not configured, then schedule dates starting from 12 am will be prepopulated. The time gap between the End Time of an appointment and the Start Time of the next will be based on the **Interval** selected.

	र्ट्सि FSM Home Customers - Work ।	Order Management 🤟 Dispatch Console	e Services And	Create Service Appoin	tment		×
	Gantt Maps Calendar	St	JB Hawks Tobacco	Schedule Information Date	17 Jan, 24		
, in	WO333 New Landscaping services for Acme Inc. Preferred Date : Jan 07, 2024	ridge Ave Bridge Ave Ave	Ave La Spaghe	Interval Work Order Details	30 Minutes		•
	Billing Address, 735 W Main St, Galesburg, Illinois, United States, 61401 WO334 New	Spruce Ave	t	WO333	Jan 17, 2024 Jan 17, 2024	04:30 PM 05:00 PM	(GMT -05.00) (GMT -05.00)
	Landscaping services for Acme Inc. Preferred Date : Jan 07, 2024 Billing Address, 735 W Main St, Galesburg, Illinois, United States, 61401	Ruby St By St W Losey St	O'Reilly Auto	WO334	Jan 17, 2024 Jan 17, 2024	05:01 PM 05:31 PM	(GMT -05.00) (GMT -05.00)
S	W0335 New Landscaping services for Acme Inc. Preferred Date : Jan 07, 2024	N Hawkinson A Marston Ave Franklin Ave	Advance Aut	WO335	Jan 17, 2024 Jan 17, 2024	05:45 PM 06:15 PM	(GMT -05.00) (GMT -05.00)
	Billing Address, 735 W Main St, Galesburg, Illinois, United States, 61401	y of Christ 1 Church	Alle	Resource Information Service Resource	Alicia Florrick ×		•
)d 1g		W North St	Western Illii		L		
٦C	Clear Schedule Appointment	N Pleasant Ave					
9	Google W Ferris St	N Ivan J mart Chat (Ctrl+Space)	N A M			Cancel Schedule	Schedule and Dispatch

You should schedule the appointments such that their timings don't overlap.

伝 FSM Home Customers 〜 Work O	rder Management – Dispatch Console Services And	Create Service Appoin	tment		×
Gantt Maps Calendar	Overlap found	Schedule Information	×		
Quick Schedule X		Date	18 Jan, 24		
Work Orders		Interval	30 Minutes	•	
WO323 New Landscaping services for Acme Inc.		Work Order Details			
Billing Address, 735 W Main St, Galesburg, Illinois, United States, 61401		WO323	Jan 18, 2024	12:00 AM	(GMT -05.00)
			Jan 18, 2024	12:30 AM	(GMT -05.00)
Landscaping services for Acme Inc.	Happy Flowers &	WO329	Jan 18, 2024	12:30 AM	(GMT -05.00)
Billing Address, 735 W Main St, Galesburg, Illinois, United States, 61401			Jan 18, 2024	01:00 AM	(GMT -05.00)
		Resource Information			
		Service Resource	Alicia Florrick ×	¥	
	nd Control W Main St Municipal Farm King Airport Farm King				
Clear Schedule Appointment	J J J J				
Google				Cancel Schedule	Schedule and Dispatch
Chats Channels Contacts Here is your Sma	rt Chat (Ctrl+Space)				

The created service appointments will be listed.

伝ジ FSM Home Customers - Work	Order Management 、 Dispatch Console	Services And	Service Appointm	ent Summary	×
Gantt Maps Calendar	St NHawkingoo	JB Hawks Tobacco Lawrence Av	WO333	Scheduled Time Jan 17, 2024 04:30 PM (GMT -05:00) - Jan 17, 2024 05:00 PM (GMT -05:00) ✓ View Service Appointment Scheduled Time Jan 17, 2024 05:01 PM (GMT -05:00) - Jan 17, 2024 05:31 PM (GMT -05:00)	
Landscaping services for Acme Inc. Preferred Date : Jan 07, 2024 Billing Address, 735 W Main St, Galesburg, Illinois, United States, 61401	Spruce Ave	[®] Spagh∉	W0334	 ♥ View Service Appointment ☑ Scheduled Time Jan 17, 2024 05:45 PM (GMT - 05:00) - Jan 17, 2024 06:15 PM (GMT - 05:00) ♥ View Service Appointment 12 	
W0334 New Landscaping services for Acme Inc. Preferred Date : Jan 07, 2024 Billing Address, 735 W Main St, Galesburg, Illinois, United States, 61401	Harmony Baptist Church	C O'Reilly Auto			
SI WO335 New Landscaping services for Acme Inc. Preferred Date : Jan 07, 2024 Billing Address, 735 W Main St, Galesburg, Illinois, United States, 61401	Aarston Ave y of Christ W Grove St Church	Advance Adt			
d 9	W North St	Western Illi			
o Clear Schedule Appointment	ve N Pleasant Avv N Hawkiusc				
Google W Ferris St	V The Drift Avenue of the second seco	Z A		Clos	se

You will not be allowed to choose work orders assigned to different territories.



(i) Points to remember

- You can only choose work orders in the New status to create the appointment.
- For the work orders chosen, all the service line items in the New status will be considered while creating the appointment.

Multi-day appointments

You can create appointments that span over multiple days. This will help you schedule appointments for complex or time-consuming services. E.g. Installing large or complex equipment may require technicians to spend multiple days on-site to ensure proper installation and set-up. This could include tasks like wiring, configuration, testing, and training. Multi-day appointments can only be created in the <u>Professional</u> edition of Zoho FSM. Please refer to this section to know how the appointment usage will be calculated for multi-day appointments.

Create Service Appo	pintment			×
Service Appointment S	Summary			
Service	AC Installation (SVC-181) New, Quantity: 1	×	•	
Summary	Installation of HVAC system Dunder Mifflin building	n at the 10-storey		
Туре	Service		•	
Asset				
Currency	USD			
Exchange Rate	1			
Scheduled Start Date Time	13 Aug 2024	09:00 AM		
Scheduled End Date Time	15 Aug 2024	12:00 PM		
Service Resource	Rob Reiner ×		•	
	Cance	Schedule	Schedu	e and Dispatch

Edit Service appointments

To edit service appointments:

1. Select Service Appointments from the Work Order Management menu.

- 2. Click the service appointment you want to edit and in the *Service Appointment details* page, click Edit.
- 3. Click **Save** after making the changes.

Delete Service appointments

To delete a service appointment, you need to have the following permissions:

- Delete permission of Service Appointments
- **Delete** permission of the following related records:
 - Time sheets
 - Service report
 - Trips
 - Notes and Attachments

The deletion of the related records will also depend on whether you have the permission to delete either **All Records** or **Own Records** of the related records.

To delete a service appointment:

- 1. Select **Service Appointments** from the **Work Order Management** menu and click the service appointment you want to delete.
- 2. In the *Service Appointment Details* page, click **Delete** from the **Edit** button.



Alternatively, in the *Service Appointment List* page hover over a service appointment, click the **More Options** [:] icon and select **Delete**.

८८० FSM Home Customers ∽	Work Order Management	✓ Dispatch Console	Services And Parts	Assets Workforce 🗸 😶			et 🏶 🗘 🕕
Filter Service Appointments	All Service Appointment	'S •					Create
Appointment Name	Appointment Name 💲	Summary	Status ≑	Asset ≑	Contact \$	Company ≑	Created Time 💲 🕂
Type here	AP-8	TV Mounting	Completed		Lucy Robins	Endeavour	Jan 18, 2023 11:11 AM
Status	AP-7	TV Installation	Completed	Samsung 80 cm (32 Inches) Seri	Lucy Robins	Endeavour	Nov 17, 2022 12:34 PM
Contact	AP-6	TV Installation	Scheduled	Samsung 80 cm (32 Inches) Seri	Helen Fahey		Nov 16, 20 Delete
Type here	AP-5	TV Installation	Scheduled		Helen Fahey		Nov 09, 2022 12:35 PM
Company Type here	AP-4	TV Installation	Completed		Helen Fahey		Aug 11, 2022 11:44 AM
Asset	AP-3	TV Installation	Completed		Helen Fahey		Jul 29, 2022 05:02 PM
Type here	AP-2	TV Installation	Completed		Helen Fahey		Mar 31, 2022 06:54 PM
Switch to Advanced Filter >>	AP-1	TV Installation	Completed		Helen Fahey		Mar 29, 2022 03:37 PM

3. Click **Delete** in the *Delete Service Appointment* popup.

0
Delete Service Appointment
Along with the appointment, all the following related records (if any) will be deleted
Timesheet
 Trips
Service Reports
Notes and Attachments
Delete action is not reversible. Are you sure to delete it?
Note
• Make use of "Cancel" in order to retain the data and free up the Agents.
• Make use of "Reschedule" to change the appointment timing.
• The monthly appointment count will be calculated based on the number of appointments created. Deleting the appointment won't reduce the usage count.
Cancel Delete

If the user doesn't have permission to delete any of the related records, then they will not be able to delete the service appointment.



Note: Service appointments of any status can be deleted.

(i) Points to remember

- The deleted appointments will be deducted from the number of <u>appointments</u> available for a month.
- Instead of deleting the service appointment and losing data, you can consider <u>Cancelling</u> the service appointment.
- In case you want to change the appointment timing, you can consider <u>Rescheduling</u> the appointment.
- When a service appointment is deleted, an entry will be included in the timeline of the parent work order indicating this.

Complete Service Appointments

To complete a service appointment:

- 1. Select Service Appointments from the Work Order Management menu.
- 2. Click the service appointment you want to complete and in the *Service Appointment details* page, click **Complete Work**.
- 3. In the confirmation message, click **Proceed**.



The above confirmation message will appear if the status of the service line items is either In Progress, or Completed.

If the status of one of the service line items is Partially Completed, then when you complete the service appointment, you will have two options:

- Complete all the services
- Do not complete partially completed services

€ FSM Home Customers ∽ Work Ord	ler Management 🤟 Disp					8	\$\$ ÷
Service Appointments > WO51 > AP-66 Move-out repairs In Progress Not yet Invoiced William Turne	er Com	plete Service Appointment AP-66	uld vou like to p	rocod?	Complete V	Vork Y Edit	
Service Appointment Information -	Timeline O	omplete all the services	ulu you like to p	No	otes		
 Service(s) Move out carnet cleaning (SVC-96) 	Services	o not complete Partially Completed Services					
Bathroom floor repair (SVC-97)	Service Line It	С	ancel Pr	oceed	Tax Name	Line Item Amount	
 Scheduled Time Jul 12, 2023 03:50 PM Jul 12, 2023 04:20 PM 	SVC-96 ↔ In Progress ① Partially Complete → ☞ Not yet Invoiced	Move out carpet cleaning 	1 Hours	\$ 50	CaliforniaExciseTax [7%]	\$ 53.5	
Actual Time Aug 03, 2023 12:18 PM (a) Assigned Service Resources	SVC-97 ⊕ Partially Completed C Resume Work ▼ ₽ Not yet Invoiced	Bathroom floor repair 	1 Hours	\$ 20	CaliforniaExciseTax [7%]	\$ 21.4	
William Turner (Lead)	Parts						
Other Details 🔹	Part Line Item Name	Part	Quantity	List Price	Tax Name	Line Item Amount	
 Company ABC Corp. LLC Contact Lucy Robins Asset 	PRT-64	SparkleClean 24 oz Carpet & Area Rug Stain Remover Spray Service Line Item SVC-96	1 Pack	\$ 22.99	CaliforniaExciseTax [7%]	\$ 24.6	
🗊 Due Date 😁					Sub Total	\$ 92.99	
Chats Contacts Here is your Smart	Chat (Ctrl+Space)						6

Complete all the services: If you choose this option, the status of the service line items will change to Completed and the status of the service appointment will change to Completed.

Do not complete partially completed services: The status of the service appointment will change to Completed. The status of the Partially Completed service line items will remain as is and the status of the other service line items will change to Completed. You can Resume Work on the Partially Completed service line items at any time.

Service Appointments > WO51 > AP-66							
Completed Not yet Invoiced William Turner					Down	oload V Edit	~ < >
Service Appointment Information	Timeline Services	and parts Time sheets Service re	ports T	rips No	otes		
 Service(s) Move out carpet cleaning (SVC-96) 	Services						
Bathroom floor repair (SVC-97)	Service Line Item Name	Service	Quantity	List Price	Tax Name	Line Item Amount	
 Scheduled Time Jul 12, 2023 03:50 PM Jul 12, 2023 04:20 PM 	SVC-96 © Completed Not yet Invoiced	Move out carpet cleaning	1 Hours	\$ 50	CaliforniaExciseTax [7%]	\$ 53.5	
 Actual Time Aug 03, 2023 12:18 PM Aug 03, 2023 12:53 PM 	SVC-97 → Partially Completed → Resume Work → → Not yet Invoiced	Bathroom floor repair 	1 Hours	\$ 20	CaliforniaExciseTax [7%]	\$ 21.4	
 Assigned Service Resources William Turner (Lead) 	Parts						
	Part Line Item Name	Part	Quantity	List Price	Tax Name	Line Item Amount	
Other Details - D Company ABC Corp. LLC (a) Contact Lucy Robins	PRT-64	SparkleClean 24 oz Carpet & Area Rug Stain Remover Spray Service Line Item SVC-96	1 Pack	\$22.99	CaliforniaExciseTax [7%]	\$ 24.6	

Cancel Service appointments

There may be instances when you do not want to proceed with a service appointment. For example, customer who had requested for an AC installation decides to not go ahead with the installation for the time being. In this case, the service appointment created for the this request will have to be cancelled.

When a service appointment is cancelled, its status changes to Cancelled.

To cancel a service appointment:

- 1. Select Service Appointments from the Work Order Management menu.
- 2. Click the service appointment you want to cancel and in the *Service Appointment details* page, click **Cancel**.

The Cancel option will be available till the service appointment is completed.



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

伝る FSM Home Customers 〜 Work Or	ler Management 🗸	Are you sure to Cancel?	×		et 🌣 🗘 🌘
Service Appointments > WO5 > AP-6 TV Installation Scheduled Not yet Invoiced Warianne Sheehan		Notes Customer has cancelled the appointment.			Dispatch Y Edit V
SA Information +	Timeline All the actions ar		Cancel Save	lotes der.	Show all updates $ \lor $ All Time $ \lor $
TV Installation (SVC-9) Scheduled Time Nov 16, 2022 07:30 PM Nov 16, 2022 09:00 PM	Nov 17, 2022	Appointment details updated . Marianne Sheehan			

Terminate Service appointments

There may be instances when you cannot proceed with a service appointment. For example, the field agent goes to the service location and finds out that the customer is not present at the service location, or the field agent is unable to carry out their task due to faulty equipment. In these cases, the service appointment created for the this request will have to be terminated.

When a service appointment is terminated, its status changes to **Cannot Complete**.

To terminate a service appointment:

- 1. Select Service Appointments from the Work Order Management menu.
- 2. Click the service appointment you want to terminate. In the *Service Appointment details* page, click **Terminate**.

The Terminate option will be available till the service appointment is completed.



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

र्ट्रे FSM Home Customers ~ V	Vork Order Management 🗸	Are you sure to Terminate?	×		et 🏟 ¢ 🌑
Service Appointments > WO5 > AP-6 TV Installation Scheduled Not yet Invoiced Ma	arianne Sheehan	Notes Customer not present at the location			Dispatch Y Edit Y
SA Information	- Timeline			lotes	
 Service(s) TV Installation (SVC-9) 	All the actions an Nov 17, 2022		Cancel Save	der.	Show all updates 🗸 🛛 All Time 🗸
 Scheduled Time Nov 16, 2022 07:30 PM Nov 16, 2022 09:00 PM 	Service 11:38 AM	Appointment details updated 1. Marianne Sheehan			

Appointment Usage Calculation

The appointment usage of a service appointment refers to the number of appointments that will be deducted from your total available appointments for it. This usage is calculated based on the time sheets of the service appointment. Specifically, the number of appointments deducted will correspond to the number of distinct dates in the time sheets created. Refer to the example below to understand this better:

Example

Time sheet	Start Date/Time	End Date/Time	Number of Distinct Dates	Number of Appointments Deducted
TS2	Jul 01, 2024 01:06 PM	Jul 01, 2024 02:45 PM	1	1
TS3	Jul 24, 2024 09:00 AM	Jul 25, 2024 03:03 PM	2	2
	3			

The Zoho FSM <u>Org timezone</u> will be considered for the calculations. The details of the appointment usage can be seen in the left panel of a service appointment.



When you have used up all your appointments, then you will encounter errors while creating service appointments or time sheets.



Points to remember

- When you create a service appointment, one appointment is automatically deducted. Later, when the total number of appointments to be deducted is calculated using the time sheets, this total includes the initial appointment deducted earlier.
- After appointments have been deducted, modifying the time sheets of the service appointment to reduce the number of distinct dates will not decrease the number of appointments already deducted.