

# **Service Territory Management**

**Service territories** are domains that can be geographical, departmental, commercial, or based on any other way you want to segment your business. This demarcation helps you manage service requests and service personnel. For example, service territories can be different regions where an organization provides their field services. Service personnel such as dispatchers and field agents are assigned to these service territories who then handle the service requests in their region.

Available in Editions: Standard, Professional

### **Create Service Territories**

Permission Required: <u>Territories</u>
 Find out the Edition-specific limits for <u>Service Territories</u>.

To create service territories:

- 1. Navigate to **Setup** > **Workforce** > **Territories** and click **New Territory**.
- 2. Enter the following details, then click **Create**:
  - a. A name in the **Territory Name** field.
  - b. The address of the service territory base in the Street, City, State, Postal Code, and Country fields.
  - c. A Description.

Create Territory			×
Territory Name	Westbrook		
Street	1318 W Glenn Ave		
City	Springfield		
State	Illinois		
Postal Code	62704		
Country	United States		
Description			
		Cancel	Create

The newly added service territory will be listed as shown below:

€ FSM Home Customers ∽	Work Order Management 🗸 Dispate	h Console Services And Parts	Assets Workforce 🗸 …		Standard Trial Upgrade	et 🕸 Ç	
Setup	Service Territories					(?)	Help
General	Define your organization's service territ thereby enabling assignment of the right	ories. Service territories help you technician to service requests re	map field technicians and dispatchers to se ceived in a region.	ervice areas,			
<ul> <li>Workforce</li> <li>Users</li> </ul>	Active Territories					New Territo	ory
Profiles	Territory Name	Description	Created By	Created Time			
Service Territories Skills	Westbrook		Mary Cooper	Mar 14, 2023 11:12 AM			
Field Service Settings	Bromley		Mary Cooper	Oct 21, 2022 02:38 PM			
<ul><li>Customization</li><li>Email</li></ul>	Colona		Mary Cooper	Apr 20, 2022 06:25 PM			
Automation	Zylker		Mary Cooper	Apr 20, 2022 05:50 PM			
Billing							
Data Administration							
<ul> <li>Developer Space</li> </ul>							

You can also search for a service territory from the territories list by clicking on the search  $[\circ]$  field and typing in a name.

र्ट्रे FSM Home Customers ~	Work Order Management 🗸 🛛 Dispatch C	Console Services And Parts As	ssets Workforce 🗸 😶	Si	tandard Trial Upgrade	⊑† \$\$	ΰ
Setup <ul> <li>General</li> <li>Workforce</li> </ul>	Service Territories Define your organization's service territori thereby enabling assignment of the right te	es. Service territories help you ma chnician to service requests receiv	p field technicians and dispatchers to ser ved in a region.	vice areas,			⑦ Help
Users	Active Territories 🔹 🔍 Wes	×				New	erritory
Profiles Service Territories	Territory Name D	Description	Created By	Created Time			
Skills <ul> <li>Field Service Settings</li> </ul>	Westbrook		Mary Cooper	Mar 14, 2023 11:12 AM			
Customization							
Email     Automation							
<ul> <li>Billing</li> <li>Data Administration</li> </ul>							
<ul> <li>Developer Space</li> </ul>							

(i) A default service territory will be added when a new Zoho FSM account is created.

# **Editing Service Territories**

To edit service territories:

- 1. Navigate to **Setup** > **Workforce** > **Territories**.
- 2. Click the name of the service territory you want to edit. Click **Edit**. Modify the required details and click **Save**.

You can also find the **Edit** [ **/** ] option by hovering over the service territory.

S FSM Home Customers	✓ Work Order Management ✓	Dispatch Console Services And Parts	Territory			X
Setup General Workforce	Service Territories Define your organization's se thereby enabling assignment	ervice territories. Service territories help you of the right technician to service requests r	Westbrook Active 😁 01 📽	Mary Cooper 🛛 👼 Mar 1	l4, 2023 11:12 AM	Add Resource
Users	Active Territories 🔹 🔍	Search	Overview Resour	ces		Edit
Profiles	Territory Name	Description	Active Resource			
Skills	Westbury		Full Name	Туре	Start Date	End Date
Field Service Settings	Westbrook		Karen Edwards	Agent	Mar 14, 2023	
Customization     Email	Bromley		Inactive Resource			
Automation	Colona			1	No Records found	
<ul> <li>Billing</li> <li>Data Administration</li> </ul>	Zylker					
Developer Space						

### **Deactivate Service Territories**

Deactivating a territory is an irreversible action. A territory once deactivated cannot be reactivated again.

To deactivate service territories:

- 1. Navigate to **Setup** > **Workforce** > **Territories**.
- 2. Click the name of the service territory you want to deactivate. Click **Deactivate**.

You can also find the **Deactivate** [ 💼 ] option by hovering over the service territory.

र्ट्रे FSM Home Customers	<ul> <li>Work Order Management          <ul> <li>Dispatch Console</li> <li>Services And</li> </ul> </li> </ul>	Territory			×
Setup • General	<b>Territories</b> Define your organization's Territories. Territories help you map field tech areas, thereby enabling assignment of the right technician to service requ	Colona 🞯 Active 😁 04 🖬 Mar	y Cooper 🛛 🛱 20 Apr 2022 06	:25 PM	Add Resource V
<ul> <li>Workforce</li> <li>Users</li> </ul>	Active Territories	Overview Resources			Edit Deactivate
Profiles	Territory Name Description	Active Resource			
Skills	Westbrook	Full Name	Туре	Start Date	End Date
Field Service Settings	Colona	Jeff Difford	Agent	20 Apr 2022	
▶ Email	Zylker	Mary Cooper	Agent	29 Apr 2022	
Maintenance Plans		Karen Edwards	Agent	07 Jun 2022	
Billing     Customization		Rob Reiner	Agent	01 Jul 2023	
Automation			, gent	015412020	
Data Administration		Inactive Resource			
Developer Space		Full Name	Туре	Start Date	End Date
		Rob Reiner	Agent	07 Jun 2022	12 May 2023
		Extermination Crew	Crew	07 Jun 2022	08 Jun 2022
		Extermination Crew	Crew	08 Jun 2022	09 Jun 2022
Chats Contacts	Here is your Smart Chat (Ctrl+Space)	Correct alconore	C	12 4 2022	21 14 2024

#### 3. Click **Proceed** in the confirmation message.

The deactivated resources can be seen under the **Inactive Territories** list.

だ FSM Home Customer	s 🗸 🛛 Work Order Management 🤟	Dispatch Console Si	ervices And Parts	Workforce 🗸	Reports	Free Edition • Upgrade	+ 🕸	÷ 🕕
Setup	Territories							⑦ Help
▶ General	Define your organization's Territo areas, thereby enabling assignmen	ries. Territories help you m It of the right technician to	ap field technicians a service requests rec	and dispatchers to eived in a region.	service			
<ul> <li>Workforce</li> </ul>								
Users	Inactive Territories   R Se	arch					New	Territory
Profiles	Territory Name	Description		Created	d By	Created Time		
Territories	Westbury			Many C	oonor	14 Mar 2022 11:15 AM		
Skills	westbuly			Mary Co	ooper	14 Mar 2023 11:15 AM		
Field Service Settings	Bromley			Mary Co	ooper	21 Oct 2022 02:38 PM		
Email								
Maintenance Plans								
<ul> <li>Billing</li> </ul>								

#### Points to remember

1. The users and crew assigned to the territory will be removed from the territory. In these users and crews, the date of deletion will be set as the **End Date Time** for this territory.

र्ट्रि FSM Home	Customers 🗸	Work Ore	der Management 🗸	Dispatch Console	Services /	And Parts	Workforce 🗸	Reports	Free Edition • Up	grade   <mark>+</mark>	\$	÷ 🕕
Crew > Carpet cleaner Carpet cleaning crew fo W Rob Reiner 🛞 Color	<b>rs</b> r dry vacuuming na									Edit	~	< >
Crew Information		•	Timeline 0	Crew members	Calendar	Territories	Skills	Notes				
Crew Name Carpe	et cleaners		Territories									+ Create
Crew Size 2     Territory Colona			Name			Start Date Ti	ne		End Date Time			
			Bromley			01 Mar 2024			01 Apr 2024			•
Territories		-	Colona			13 Aug 2022			31 Mar 2024			
Members No Crew Found		•										

2. If there are active crews associated with the territory, then you will not be allowed to delete the territory, and you will encounter an error. You will first need to deactivate the crews the territory is associated with.

<b>₩</b> FSM Home Customers	🗸 🗸 Work Order Management 🤟	Dispatch Console	Services And Parts	Workforce $\sim$	Reports	Free Edition • Upgrade	। 🕂 ह	» ¢ 🕕
Setup ▶ General	Territories Define your organization's Territo areas thereby enabling assignmen	Unable to de crews within territory.	activate the territory be it. Please deactivate the	ecause there are act e crews first to rem	tive $ imes$ ove this			⑦ Help
<ul> <li>Workforce</li> <li>Users</li> </ul>	Active Territories	rch					N	ew Territory
Profiles	Territory Name	Description	Ci	reated By		Created Time		
Territories Skills	Westbury		м	lary Cooper		14 Mar 2023 11:15 AM		
Field Service Settings	Westbrook		м	lary Cooper		14 Mar 2023 11:12 AM		
<ul><li>Email</li><li>Maintenance Plans</li></ul>	Bromley		м	lary Cooper		21 Oct 2022 02:38 PM		
▶ Billing	Colona		м	lary Cooper		20 Apr 2022 06:25 PM	*	<b>•</b> :
<ul><li>Customization</li><li>Automation</li></ul>	Zylker		М	lary Cooper		20 Apr 2022 05:50 PM		

3. If there are transactional records (Requests, Estimates, etc.) associated with the territory, those records will be listed. Click on **Yes, Proceed** if you want to deactivate the territory.

र्ट्रि FSM Home Customers	o → Work Order Management →	Dispatch Console 5	Services And Parts	Workforce ~ Reports	Free Edition • Upgrade	¢ (	ĉ	
Setup • General • Workforce	Territories Define your organization's Territ areas, thereby enabling assignme Active Territories	<b>Territory associated</b> Few active records are f	d with active rec	<b>ords</b> / Are you sure to deactivate it:		New Te	⑦ ⊦ erritor	Help
Profiles Territories	Territory Name	Module Service_Appointments	Record Name	Status New	Created Time			
Skills <ul> <li>Field Service Settings</li> </ul>	Westbury Westbrook	Requests Estimates	REQ30 ES23	New	14 Mar 2023 11:15 AM 14 Mar 2023 11:12 AM			
<ul> <li>Email</li> <li>Maintenance Plans</li> </ul>	Bromley			Cancel Yes, Proceed	21 Oct 2022 02:38 PM			
Billing     Customization     Automation	Colona		M	ary Cooper ary Cooper	20 Apr 2022 06:25 PM 20 Apr 2022 05:50 PM			
Data Administration								

When you deactivate a territory, the associated transactional records will be affected as follows:

- You will not be able to create a service appointment for a work order with the deleted territory. You will have to clone the work order to change the territory. In the service appointment, all the service resources will be listed as unavailable.

G FSM Home Customers - Work Or	der Management – Dispatch Console Services And Parts Wo	Create Service Appointm	ent	×
Work Orders > WO60 Move out carpet cleaning New Service Not yet Invoic	ed wir Mary Cooper	Service Appointment Summa	ary	
Work Order Details	Timeline Services and parts Service appointments	Service	Move out carpet cleaning (SVC-168) Xew, Quantity: 1	
<ul> <li>Requests REQ29</li> <li>Estimates</li> </ul>	Service Appointments View, manage, schedule and dispatch Service Appointments to the field techniciar	Summary	Move out carpet cleaning	
R Parent Work Order	Service Appointment(s) yet to be scheduled for the following service	Туре	Service -	
Contact Details -	* Move out carpet cleaning (SVC-168)	Currency	USD -	
Company ABC Services     Rotact Lucy Robins		Scheduled Start Date Time	1 01 Apr 2024 03:00 PM	
Email luc.robins@zylker.com		Scheduled End Date Time	01 Apr 2024 04:00 PM	
& Phone 111-111-1111		Service Resource	Select	
Address *			Unavailable Agents	
() Territory Bromley			Not available in this Territory	
<ul> <li>Service Address</li> <li>Service Address</li> <li>813 E State St</li> <li>Rockford, Illinois, 61104,</li> <li>United States</li> </ul>			kon Weasley Susan Hayworth Karen Edwards Rob Reiner	
<ul> <li>Billing Address</li> <li>Service Address</li> <li>813E State St</li> <li>Bockford Illinois (\$1104)</li> </ul>			Jeff Difford Mary Cooper	
Chuts Contacts Here is your Smar	t Chat (Ctrl+Space)		Cancel Schedule	Schedule and Dispatch

- If the request or estimate that you are trying to convert to an estimate or work order has a deleted territory, then you will need to change the territory.



### **View Service Territories**

The details about a service territory will be displayed under the following sections:

#### **Overview**

The overview displays all the details about the service territory.

Territory		×
Westbrook 📀 Active 🕑 0 🖬 Ma	ry Cooper 🛛 🐻 Mar 14, 2023 11:12 AM	Add Resource $\lor$
Overview Resource	25	
Territory Details		
Territory Name	Westbrook	
Street	1318 W Glenn Ave	
City	Springfield	
State	Illinois	
Postal Code	62704	
Country	United States	
Description		
		4

#### Resources

All the service resources assigned to the territory will be listed here. A service resource is active in a territory if their **End Date** for the territory is not in the past.

Territory			×
<b>Westbrook</b>	Mary Cooper 🛛 🗟 Mar 1	4, 2023 11:12 AM	Add Resource V
Overview Resour	ces		
Active Resource			
Full Name	Туре	Start Date	End Date
Karen Edwards	Agent	Mar 14, 2023	
nactive Resource			
	1	No Records found	

# **Add Resource**

To add a resource to a territory:

- 1. Click the name of the service territory you want to add the resource to.
- 2. In the *Territory* overlay, click **Add Resource**.

Alternatively, hover over the service territory and select **Add Resource** from the **more options** [ : ] menu.

3. Select a user, and set the **Start Date** and the **End Date** and click **Add**.

The period between the **Start Date** and the **End Date** is when the user will be active in that territory.

C FSM Home Customers ~	Work Order Management V Dispa	tch Console Services And Parts	Territory		
<ul> <li>General</li> <li>Workforce</li> <li>Users</li> <li>Profiles</li> <li>Service Territories</li> <li>Skills</li> <li>Field Service Settings</li> <li>Customization</li> <li>Email</li> </ul>	Define your organization's service ten thereby enabling assignment of the rig Active Territories	Add Resource Per To Mar 14, 2023 11:12 AM User Jeff Difford × 8 Start Date Mar 15, 2023 End Date MMM DD, YYYY		Add Resource V	
	Westbury Westbrook Bromley		Cancel Add Inactive Resource	No Records found	
<ul> <li>Automation</li> <li>Billing</li> <li>Data Administration</li> <li>Developer Space</li> </ul>	Colona Zylker			No Records found	

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  $[\checkmark]$  icon to modify it.

Territory							
Westbrook	Add Resource V						
Overview Resources							
Active Resource							
Full Name	Туре	Start Date	End Date				
Jeff Difford	Agent	Mar 15, 2023					
Inactive Resource							
No Records found							