



Set Up Skills

Skills refer to the professional abilities and competencies that the field agents and crews possess to perform their job duties effectively. When a work order is created, the skills required to accomplish the work order are added. In the [dispatch console](#), you can assign service appointments to field agents or crew based on their skills.



Available in Editions: **All Editions**

Create Skills

- ① - **Permission Required:** [Skills](#)
- Find out the Edition-specific limits for [Skills](#).

To add a skill:

1. Navigate to **Setup > Workforce > Skills** and click **Add Skill**.
2. Enter the following details, then click **Create**:
 - a. A name in the **Skill Name** field.
 - b. A **Description** of the skill.

Create Skill ✕

Skill Name

Description

Manage Skills

You can edit or delete the skills:

1. Navigate to **Setup > Workforce > Skills**.
2. Hover over the name of the skill for the Edit [✎], and Delete [🗑] options.

The screenshot shows the Zoho FSM interface for managing skills. The left sidebar contains a navigation menu with 'Setup' expanded to show 'Skills'. The main content area is titled 'Skills' and includes a search bar and an 'Add Skill' button. A table lists existing skills:

Skills Name	Description	Created By	Created Time
Pipe Leaks	Defective Water Pipe Material Leaks, Plumbing ...	Jane Rizzoli	Jan 27, 2023 04:24 PM
Carpet Cleaning & Stain Removal	Residential, Commercial spaces	Jane Rizzoli	Jan 27, 2023 12:46 PM

The 'Carpet Cleaning & Stain Removal' row has a red box around the Edit and Delete icons.

Assign Skills to Users/Crews

To assign a skill to a user:

1. Navigate to **Setup > Workforce > Skills**.
2. Click on the skill you want to assign to the user/crew.
3. Click **Assign**.
4. Enter the following information and click **Create**:

Skill Information

- a. **Service Resource:** The user/crew to whom you want to assign this skill.
- b. **Level:** The proficiency level of the user/crew for this skill. The maximum value that can be assigned is 100.

Certificate Details

- c. **Description:** Details of any certification done by the user/crew.
- d. **Certificate ID:** A unique identifier for the certification.
- e. **Issuing Authority:** The type of body or agency that has issued the certificate.
- f. **Issue Date:** The date the certificate was issued.
- g. **Expiry Date:** The date the validity of the certificate will expire.
- h. **Renewal Status:** The renewal status of the certification.
- i. **Certificate Type:** The category of the certification.
- j. **Certificate Status:** The status of the validity of the certification.

This field will be displayed only if you select the checkbox **Manual Status Override** in the **Service Resource Skills** module in *Module Builder*.

Assign to Service Resource ✕

Skill Information

Service Resource ✕ 

Level

Certificate Details

Description

Certificate Id

Issuing Authority

Issue Date

Expiry Date

Renewal Status

Certificate Type

Once assigned, select the entry to include any notes/attachments in the **Notes** section. By default, the **Certificate Status** will be **Active**. After the **Expiry Date**, it will change to **Expired**.

Delete Skills Assigned To Users/Crews

1. Navigate to **Setup > Workforce > Skills**.
2. Click on the assigned skill that you want to delete from the user/crew.
3. Hover over the user/crew in question and click the **Delete** [] icon.
4. Click **Unassign** in the confirmation message.

Skill



Carpet Cleaning & Stain Removal

Residential, Commercial spaces

Marianne Sheehan 24 Oct 2024 02:51 PM

Service resources

Service Resources

[+ Assign](#)

Name	Service Resource	Level	Certificate Status	Issue Date	Expi
SR-SKILL-2	Marianne Sheehan	80	Active	24 Oct 2024	

