



IT technicians · Zoho One optimization



Zoho FSM

User and Administrator Manual

→ [Go to the index](#)

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Index — English version

Click any title to jump directly to that section. Each chapter ends with a “Back to index” link.

PART 1 — USER GUIDE

1. Introduction and access

- 1.1 About this manual
- 1.2 What is Zoho FSM?
- 1.3 Signing in

2. Interface and navigation

- 2.1 Main modules
- 2.2 Useful landmarks

3. Customers and service addresses

- 3.1 Creating a customer
- 3.2 Customer record

4. Requests and estimates

- 4.1 Logging a request
- 4.2 Preparing an estimate

5. Work orders

- 5.1 Work order content
- 5.2 Creating a work order
- 5.3 Work order statuses

6. Service appointments

- 6.1 Scheduling an appointment
- 6.2 Appointment lifecycle
- 6.3 Multi-day appointments

7. Dispatch console

- 7.1 Using the console
- 7.2 Decision aids

8. Technician mobile app

- 8.1 Job workflow
- 8.2 App features

9. Assets and maintenance plans

- 9.1 Customer assets
- 9.2 Maintenance plans and service contracts

10. Invoicing and payments

- 10.1 Invoicing a job
- 10.2 Invoicing options

11. Reports and dashboards

- 11.1 Useful metrics
- 11.2 Creating a report

12. Best practices

- 12.1 Nuagix recommendations

PART 2 — ADMINISTRATOR GUIDE

13. Users, profiles and crews

- 13.1 Profiles
- 13.2 Adding a user
- 13.3 When an employee leaves

14. Organization settings

- 14.1 Basic setup
- 14.2 Field resources

15. Customization

- 15.1 Customization options
- 15.2 Bilingual job sheets

16. Automation

- 16.1 Automation tools
- 16.2 Creating a workflow rule

17. Integrations

- 17.1 Zoho integrations
- 17.2 Other integrations

18. Security and compliance

- 18.1 Security controls
- 18.2 Privacy and Quebec Law 25

19. Editions and licenses

- 19.1 Editions
- 19.2 Tracking usage

20. Deployment checklist

- 20.1 Before going live

APPENDIX

A. English-French glossary

- A.1 Interface terms

Part 1 — User Guide

1. Introduction and access
2. Interface and navigation
3. Customers and service addresses
4. Requests and estimates
5. Work orders
6. Service appointments
7. Dispatch console
8. Technician mobile app
9. Assets and maintenance plans
10. Invoicing and payments
11. Reports and dashboards
12. Best practices

[↑ Back to index](#)

1. Introduction and access

1.1 About this manual

This manual describes the Zoho FSM features available to users (dispatchers, technicians, office staff) and the functions reserved for administrators, as available in September 2026.

Available features vary by edition (Free, Standard, Professional, Premium) and by your organization's configuration.

1.2 What is Zoho FSM?

Zoho FSM (Field Service Management) is Zoho's field service management software. It covers the full service cycle: receiving the customer's request, estimate, work order, scheduling and dispatching appointments to technicians, on-site execution with the mobile app, signed service report, invoicing and payment.

It is designed for installation, maintenance and repair businesses: HVAC, plumbing, electrical, equipment, landscaping, technical services, and more.

1.3 Signing in

1. Go to <https://fsm.zoho.com> (or <https://fsm.zohocloud.ca> if your organization is hosted in the Canadian data center).
2. Sign in with your Zoho account or your organization's single sign-on.
3. If you use Zoho One, open the app launcher and select FSM.
4. Complete multi-factor authentication with Zoho OneAuth if required.
5. Technicians install the Zoho FSM mobile app and sign in with the same account.

Nuagix tip — Have one or two technicians test the mobile app on real jobs before rolling it out to the whole team.

[↑ Back to index](#)

2. Interface and navigation

2.1 Main modules

Module	Content
Requests	Needs expressed by customers, before qualification
Estimates	Price quotes sent to the customer for approval
Work Orders	Approved work to perform, with services and parts
Service Appointments	Scheduled visits assigned to technicians
Dispatch Console	Calendar and map view to schedule and dispatch
Contacts, Companies	Customer records, service addresses and history
Assets	Equipment installed at customer sites
Invoices, Payments	Billing for jobs and payment collection
Reports	Reports and dashboards
Setup	Settings, mostly reserved for administrators

2.2 Useful landmarks

- + button to quickly create a request, work order or customer
- Global search by name, address, phone or document number
- Filterable and customizable list views
- Timeline on every record: actions, emails and status changes
- Links between documents: request > estimate > work order > appointment > invoice

[↑ Back to index](#)

3. Customers and service addresses

3.1 Creating a customer

1. Contacts > Create.
2. Enter the name, email, phone and, if applicable, the company.
3. Add the billing address and one or more service addresses (e.g., several buildings).
4. Enter the preferred language, payment terms and applicable tax (GST and QST).
5. Save; assets, requests and work orders will appear on the record.

3.2 Customer record

- Full history of requests, estimates, work orders and invoices
- Installed assets and active maintenance plans
- Service addresses geolocated on the map
- Access notes (door code, parking, pets)
- Receivable balance and payments

Nuagix tip — Record access instructions on the service address: the technician will see them on their phone before arriving.

[↑ Back to index](#)

4. Requests and estimates

4.1 Logging a request

1. Requests > Create, or automatic intake by web form or email.
2. Select the customer and service address.
3. Describe the need, priority and preferred date.
4. Add the likely services and parts, and the related asset.
5. Convert the request to an estimate (if a price needs approval) or directly to a work order.

4.2 Preparing an estimate

1. From the request, click Convert to Estimate, or Estimates > Create.
2. Add services (labour) and parts, with quantities and prices.
3. Apply taxes (GST and QST) and a discount if needed.
4. Email the estimate to the customer; they can accept it online depending on configuration.
5. Once approved, convert it into a work order.

Nuagix tip — Create estimate templates for your common jobs (e.g., annual heat pump maintenance): you will save time and standardize your pricing.

[↑ Back to index](#)

5. Work orders

5.1 Work order content

Element	Description
Services	Labour tasks to perform, with duration and price
Parts	Material used or to be installed
Service Tasks	Checklist to follow on site, depending on edition
Asset	Equipment covered by the job
Priority and due date	Urgency and completion deadline
Appointments	One or more scheduled visits to complete the work

5.2 Creating a work order

1. Work Orders > Create, or convert a request or estimate.
2. Check the customer, service address and asset.
3. Add services, parts and service tasks.
4. Set the priority, due date and notes for the technician.
5. Save, then schedule the service appointment.

5.3 Work order statuses

- New: created, not yet scheduled
- Scheduled: one or more appointments are set
- In Progress: the technician has started the job
- Completed: all visits are done
- Cancelled: work abandoned

[↑ Back to index](#)

6. Service appointments

6.1 Scheduling an appointment

1. From the work order, click Schedule.
2. Choose the date, time and expected duration.
3. Assign a technician or crew, based on availability and skills.
4. Save; the technician is notified in the mobile app and the customer can receive a confirmation.

6.2 Appointment lifecycle

Status	Meaning
Scheduled	Date and time set, technician not confirmed or awaiting dispatch
Dispatched	Assigned and sent to the technician
In Progress	The technician has started work on site
Completed	Work done, service report available
Cancelled	Visit cancelled or to be rescheduled

6.3 Multi-day appointments

For long jobs (e.g., a full installation), create a multi-day appointment or several visits linked to the same work order, depending on edition. Each visit has its own time tracking and report.

[↑ Back to index](#)

7. Dispatch console

7.1 Using the console

1. Open the Dispatch Console.
2. On the left, review unassigned appointments or those to reschedule.
3. In the centre, the grid shows technicians and their schedule by day or week.
4. Drag an appointment onto the technician's row at the desired time.
5. Check the map to locate technicians and nearby jobs.
6. Click Dispatch to send the job to the technician.

Nuagix tip — Group jobs in the same area into one technician's day: you will cut travel time and fuel costs.

7.2 Decision aids

- Availability based on shifts and time off
- Filters by territory and skill, depending on edition
- Real-time technician location, if they have allowed it
- Schedule conflict and overload indicators
- Quick changes for emergencies or absences

[↑ Back to index](#)

8. Technician mobile app

8.1 Job workflow

1. The technician reviews the day's appointments and gets directions to the service address.
2. They indicate departure (Start Trip), then arrival; travel time is recorded.
3. They start the job (Start Work) and follow the service task checklist.
4. They add parts used, notes and before-and-after photos.
5. They complete the Service Report and have the customer sign on screen.
6. They complete the appointment; the office receives the report and can invoice.

8.2 App features

- Offline mode: view and update jobs without a network, with sync when back online
- Customer e-signature
- Photos, attachments and voice notes
- Timesheets and trip tracking
- Asset and previous visit history
- Create an invoice and collect payment on site, depending on permissions

Note — Location tracking is only active during working hours, depending on configuration. Inform your technicians of its use.

[↑ Back to index](#)

9. Assets and maintenance plans

9.1 Customer assets

- One record per piece of equipment: model, serial number, installation date, warranty
- Linked to the customer and service address
- History of every job on the asset
- Quick access for the technician in the mobile app

9.2 Maintenance plans and service contracts

1. Maintenance Plans > Create, depending on edition.
2. Select the customer, covered assets and services to perform.
3. Set the frequency (e.g., every 6 months) and contract duration.
4. Zoho FSM automatically generates preventive work orders or appointments on the planned dates.
5. Invoice the contract as agreed (in advance, per visit or grouped).

Nuagix tip — Preventive maintenance contracts stabilize your revenue and schedules: offer one systematically after every installation.

[↑ Back to index](#)

10. Invoicing and payments

10.1 Invoicing a job

1. From the completed work order, click Create Invoice.
2. Check services, parts and actual time spent.
3. Apply GST and QST, then save.
4. Email the invoice with an online payment link, if a gateway is configured.
5. Record payments received (card, cheque, transfer).

Note — If Zoho Books is integrated, invoices and payments are synced with accounting.

10.2 Invoicing options

- Grouped invoicing of several work orders, depending on edition
- Retainer invoices before the work
- Multi-currency, depending on edition
- Branded invoice templates

[↑ Back to index](#)

11. Reports and dashboards

11.1 Useful metrics

Metric	Purpose
Work orders by status	Track workload and delays
Completed appointments by technician	Measure productivity
First-time fix rate	Assess job preparation
Travel and work time	Optimize routes
Revenue by service or customer	Identify profitable activities
Accepted estimates	Track quote conversion rate

11.2 Creating a report

1. Reports > Create Report.
2. Choose the module (e.g., Service Appointments) and columns.
3. Add filters and groupings (e.g., by technician, this month).
4. Save and schedule email delivery, depending on edition.

[↑ Back to index](#)

12. Best practices

12.1 Nuagix recommendations

- Keep service addresses and access instructions up to date
- Plan the following week every Thursday in the dispatch console
- Require photos and a customer signature for every completed job
- Enter parts used on site, not at the end of the week
- Invoice the same day the job is completed
- Communicate with Quebec customers in French and respect each customer's preferred language
- Review every month the jobs that required a second visit

[↑ Back to index](#)

Part 2 — Administrator Guide

- 13. Users, profiles and crews
- 14. Organization settings
- 15. Customization
- 16. Automation
- 17. Integrations
- 18. Security and compliance
- 19. Editions and licenses
- 20. Deployment checklist

[↑ Back to index](#)

13. Users, profiles and crews

13.1 Profiles

Profile	Access
Administrator	Full access, including setup
Dispatcher	Manages requests, work orders, scheduling and dispatch
Field Agent	Views and performs their appointments, mainly in the mobile app
Limited Field Agent	Restricted access to their own jobs
Custom profile	Granular per-module permissions, depending on edition

13.2 Adding a user

1. Setup > Workspace > Users > Add.
2. Enter the name, email and phone.
3. Assign the profile and, for a technician, their territory, skills and shift.
4. Add them to a crew if jobs are done in teams.
5. The user receives an invitation and uses a license once active.

Note — In Zoho One, first add the user in the Zoho One console and assign them the FSM app.

13.3 When an employee leaves

1. Reassign their future appointments in the dispatch console.
2. Recover equipment and check that their mobile app has synced all data.
3. Remove them from crews, territories and automations.
4. Deactivate the user to free the license.

Caution — Deactivating a technician before their app syncs can cause photos or signatures recorded offline to be lost.

[↑ Back to index](#)

14. Organization settings

14.1 Basic setup

1. Setup > Organization Profile: name, address, logo, time zone, currency (CAD).
2. Setup > Taxes: create GST, QST and a GST + QST group, with your registration numbers.
3. Set business hours and Quebec holidays.
4. Create the Services and Parts catalogue, with prices and units.
5. Configure the email, estimate, service report and invoice templates.

14.2 Field resources

Element	Purpose
Territories	Divide the service area (e.g., South Shore, Laval, Quebec City) and limit visible data
Skills	Link certifications or specialties to technicians and services, depending on edition
Crews	Groups of technicians working together
Shifts	Technician availability schedules, depending on edition
Time Off	Absences taken into account when dispatching

Nuagix tip — Map skills to mandatory certifications (e.g., gas, refrigerants, electrical): dispatch will avoid sending an unqualified technician.

[↑ Back to index](#)

15. Customization

15.1 Customization options

- Custom fields in modules (requests, work orders, assets, etc.)
- Custom layouts and views
- Record Templates for common jobs, depending on edition
- Job Sheets: forms the technician fills in on site, depending on edition
- Branded service report and invoice templates
- Custom profiles and field-level security, depending on edition

15.2 Bilingual job sheets

Prepare your job sheets and service reports in French, with your industry's technical terms. If you also serve English-speaking customers, create an English version and choose the template based on the customer's language.

[↑ Back to index](#)

16. Automation

16.1 Automation tools

Tool	Use
Workflow rules	Actions on create or status change (email, update, webhook, function)
Time-based workflows	Reminders before an appointment or follow-up after a job, depending on edition
Customer notifications	Appointment confirmation, technician on the way, job completed, by email or SMS
Custom functions (Deluge)	Custom logic and API calls
Webhooks and connections	Exchanges with other applications

16.2 Creating a workflow rule

1. Setup > Automation > Workflow Rules > Create.
2. Choose the module (e.g., Service Appointments) and trigger (e.g., status = Completed).
3. Add conditions if needed.
4. Add actions: thank-you email with the service report, follow-up task, webhook.
5. Save and test with a dummy appointment.

Nuagix tip — A “Technician on the way” notice with the expected arrival time greatly reduces customer calls and missed visits.

[↑ Back to index](#)

17. Integrations

17.1 Zoho integrations

Application	Typical use
Zoho CRM	Sync customers and companies; create requests or work orders from a deal or contact
Zoho Books	Sync customers, services, parts, invoices and payments with accounting
Zoho Inventory	Parts stock management, depending on available integrations
Zoho Desk	Turn a support ticket into a field service request
Zoho Analytics	Advanced operations analytics
Zoho Sign	Signature of maintenance contracts

17.2 Other integrations

- Payment gateways for online and on-site payments
- Messaging: WhatsApp and SMS for customer notifications, depending on edition
- Mapping and geolocation
- Zoho Flow or Zapier for cross-app automations
- REST API (OAuth 2.0) and webhooks

Caution — Define a single master source for customers and items (CRM, Books or FSM) to avoid duplicates between applications.

[↑ Back to index](#)

18. Security and compliance

18.1 Security controls

- Multi-factor authentication and single sign-on (SAML) via Zoho Accounts / Zoho Directory
- Profiles and permissions limited to what is strictly needed
- Territory and field-level permissions, depending on edition
- Audit log: history of user actions
- Mobile device management: remote sign-out if a device is lost
- Hosting in the Canadian data center (zohocloud.ca)

18.2 Privacy and Quebec Law 25

- Inform technicians that their location is collected and limit it to working hours
- Avoid photographing unnecessary personal information at customer sites
- Limit access to customer contact details by territory and profile
- Handle access, correction and deletion requests
- Set a retention period for photos and service reports

Note — This manual is not legal advice. Confirm your obligations with your legal advisor.

[↑ Back to index](#)

19. Editions and licenses

19.1 Editions

Edition	For whom
Free	Getting started: basic features, limited monthly appointments
Standard	SMBs: web forms, service tasks, maps and location, crews, customization
Professional	Growing businesses: assets, maintenance plans, job sheets, multi-day appointments
Premium	Organizations: territories, skills, shifts, scheduled reports, advanced insights
Zoho One	FSM included with the suite's other apps, depending on the current offer

19.2 Tracking usage

Setup > Subscription shows the edition, licenses used and edition-specific limits. Exact limits vary by edition; remove licenses from deactivated users.

[↑ Back to index](#)

20. Deployment checklist

20.1 Before going live

- ☐ Organization profile, currency (CAD), time zone, business hours and holidays configured
- ☐ GST, QST and registration numbers configured
- ☐ Services and parts catalogue created
- ☐ Users, profiles, crews, territories and skills defined
- ☐ Customers, service addresses and assets imported
- ☐ Bilingual estimate, service report and invoice templates ready
- ☐ Preventive maintenance plans created
- ☐ Customer notifications and workflows tested
- ☐ Mobile app installed and tested by technicians (including offline)
- ☐ Integrations (CRM, Books) and payment gateway configured
- ☐ Privacy settings (Law 25) applied
- ☐ Dispatchers and technicians trained

Nuagix tip — Nuagix can support your team with Zoho FSM setup, integration and training.
Book a Zoom meeting: <https://nuagix.zohobookings.com/#!/andre-martin>

[↑ Back to index](#)

Appendix

A. English-French glossary

[↑ Back to index](#)

A. English-French glossary

A.1 Interface terms

English (interface)	French
Request	Demande
Estimate	Estimation
Work Order	Bon de travail
Service Appointment	Rendez-vous de service
Dispatch Console	Console de répartition
Dispatch	Répartir
Field Agent	Technicien
Dispatcher	Répartiteur
Crew	Équipe
Territory	Territoire
Skill	Compétence
Shift	Quart de travail
Asset	Actif
Maintenance Plan	Plan d'entretien
Service Task	Tâche de service
Part	Pièce
Service Report	Rapport de service
Job Sheet	Fiche de travail
Timesheet	Feuille de temps
Trip	Déplacement

[↑ Back to index](#)