Skilled Service Manager Program Overview

Developed by Sean Skilling Skilled Media Design 860.799.0747

FLANGE SET, WITH BOLTS HYDR-FLANGESET \$28.95

info@skilledmediadesign.com https://www.skilledmediadesign.com

Use the Web to have multiple users (with varying access permissions) create and track service calls for an unlimited number of technicians. Generate invoices from the field, capture revenue from follow-up work needed, keep a running view of all posted and invoiced revenue.

Capture video or stills of items requiring followup work, and send them to the customers. Push customers directly to your payment processor.

The program is developed to be cloud based, it can be accessed from any location, home, office, field, van, etc.

Use it on a phone, tablet or computer the application is fully responsive.

ASHAWAY

GLASTONBURY

UNCASVILLE

EAST HARTFORD

ADD A NEW EVENT

0

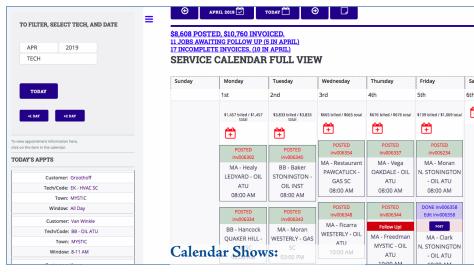
None S/D

Phone

Last ATU

Sat 6th April 2019

First Name



♦ monthly jobs posted v invoiced

invoices needing office attention

♦ requiring follow up service

♦ daily amount posted

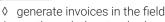
ASSIGNED TECH

CLIENT: GROOT!

Streamlined Scheduling:

- standardize addresses
- track tax status
- same day
- ♦ on call
- ♦ diagnostic
- ♦ standardize rates for techs
- standardize services (like an annual tune-up)
- ♦ over-ride as needed
- ♦ Schedule start and end times, as well as the time window. Once scheduled, this can automatically be emailed to the customer (along

with any schedule updates).



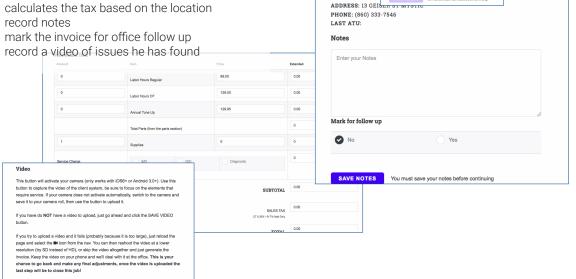
run through the standard tests for either heating or cooling plants

enter parts (both billable and non-billable)

- enter hours at standard and OT rates
- ◊ rate assigned from the office
- ♦ calculates the tax based on the location
- record notes

Browse... No file selected SAVE VIDEO

Field Invoices:



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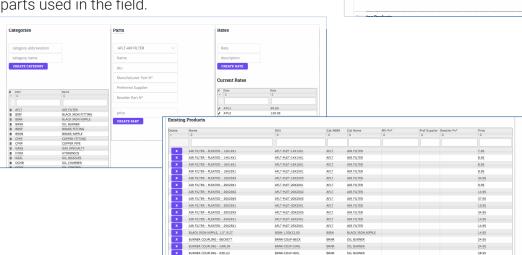
Existing Installs (click to edit)

Parts & Installations:

Service Invoice # 006339

For larger jobs, like installations or similar, the parts database allows the office to enter details of the install and then assign them to the scheduled appointment.

The parts database is also the source for the taxable and non-taxable parts used in the field.



BESTENERGY 599-1920

www.bestenergyctri.com



Low Water: NO

Inspect for Contract: NO

Invoice:

Normally, the tech submits the invoice and it is reviewed by the office before being emailed to the customer, but if the customer pays by check, he marks it paid and they sign the invoice electronically.

- ♦ Includes company logo
- ♦ can use any starting invoice number
- shows test results
- o emails invoice to the customer with
- ♦ a link to the video
- ♦ link to the payment screen
- data from this invoice populates the payment info