

Essential Workforce Management

Job Scheduling and Dispatching

Quickly create and assign jobs on the go or in the office with fast and easy entry forms. Jobs can be assigned to one or multiple team members and notifications are automatically sent to them, alerting of their newly assigned job.

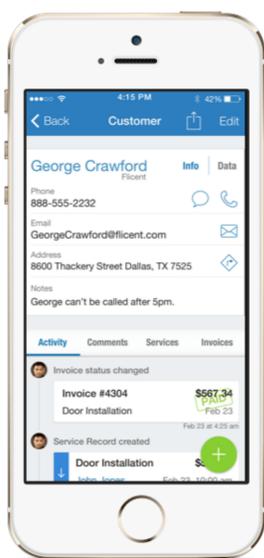
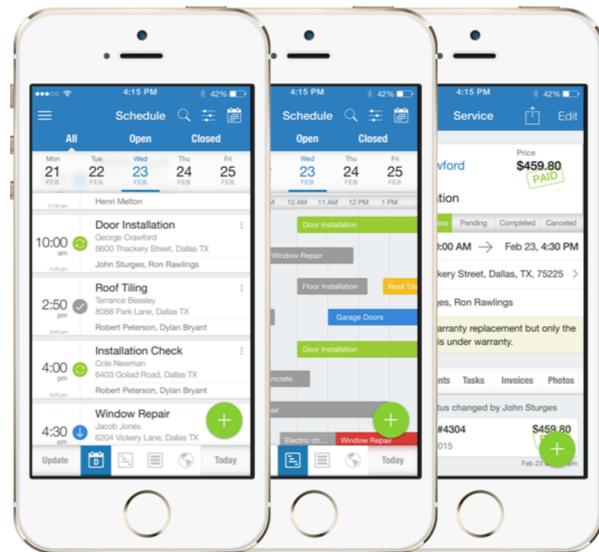
Attach job notes, comments, files, and photos to provide all necessary information for the field techs to perform the job.

With multiple schedule views ranging from daily agendas, team gantt charts, and map plots, gain further insight for advanced timing and location based scheduling.

Gantt based scheduling tools allow you to easily find available team members and timeslots for new jobs.

Plotted job maps allow you to easily assign jobs based on relative location for your team members.

Use predefined service templates to quickly fill out job details based on common services you provide.



Customer Relationship Management (CRM)

Create and manage customer profiles to better serve your customers. Store customer information, log comments, track updates, and easily find customer jobs and invoices.

Customer profiles provide quick access to important information and contact methods. Track both individual customers as well company customers with multiple points of contact.

View all jobs, estimates, and invoices created for the customer to never lose track of customer history and payments.

All customer related files such as photos and invoice PDFs are conveniently stored in the customer profile for quick referencing.

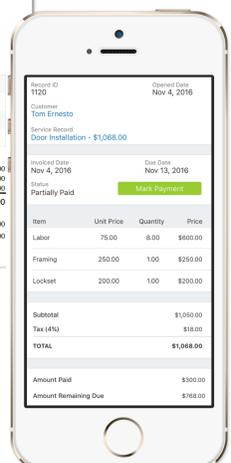
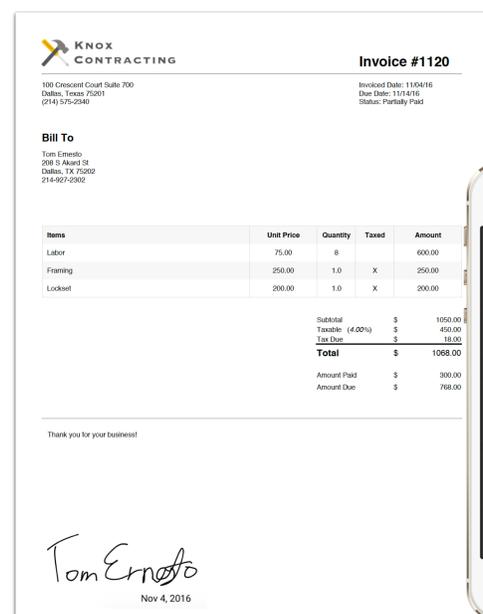
Log comments to their profile for chronological notes and updates.

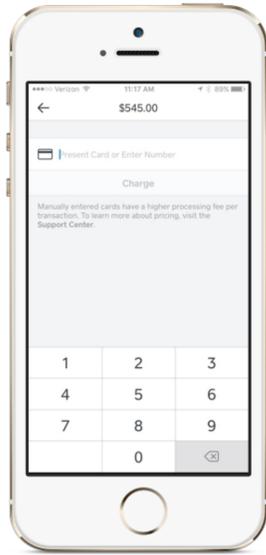
Invoices and Estimates

Whether out in the field or in the office, quickly create itemized estimates and invoices for customers. Add line items to the invoice in different quantities with different tax applications. Subtotals, tax, and totals are automatically calculated for you. Once generated via computer or smartphone, simply send or print an auto-generated PDF of the invoice for your customer. Easily update the invoice status to never lose track of a payment.

Create Invoice Item Templates as a repository of line items added to the invoice. This allows you to quickly and easily insert common invoice line items into your invoices without repetitive manual entry. Store invoice item templates of labor rates, common supplies used, equipment installed, and more.

Create estimates, quotes, or proposals for customers on the spot with your smartphone. Once approved by the customer, immediately accept customer signatures on your PDF as an agreement to move forward on your proposal. To convert the accepted proposal to a customer invoice, simply change the status and regenerate the PDF as an invoice. No more recreating estimates to invoices.





Payment Integration with Square

With Square Payment integration, link your account to easily accept payments from customers. With the push of a button, initiate a Square payment on your smartphone or computer automatically linked to your invoice. After the payment is approved in Square, the linked invoice is automatically updated with the Square transaction number.

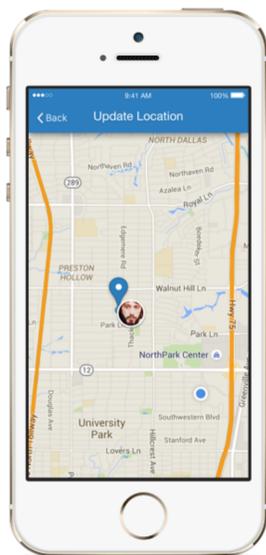
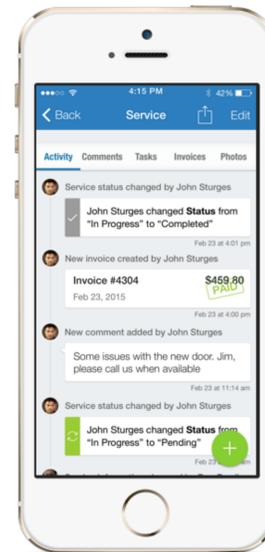
Status and Update Logging

Keep a pulse on activities around the business with automatic update logs. Field agents can quickly update job status, attach photos, and log written updates to the job record from their mobile device. All changes are automatically captured in a chronological activity feed to give managers real-time insight into the job.

Team members can quickly update the status a job with a single click to mark that the job is in progress, pending action, completed, or canceled. Status updates are automatically logged to the activity feed with a timestamp and a geotag of the user's location, allowing you to confirm that team members reached the job site on time.

Log comments and attach photos to show progress of the job back to management. Files are automatically attached to both the job record and the customer for traceability.

All update activities performed around the team are merged back into the Update Feed of the manager for a chronological snapshot of the activity around the business. Easily see when jobs are started, comments are logged, files are attached, invoices are created, payments are made, and jobs are completed in one convenient update feed.

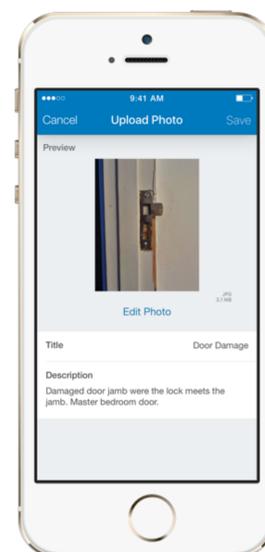


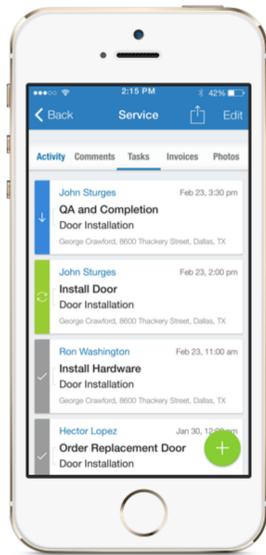
Field Agent Location Tagging

Track the time and location of job status changes made by team members to confirm that team members truly arrived at the job site on time and completed the job as indicated. When field agents change the status of a job to indicate the the job is in progress, pending action, or completed, the update entry in the activity feed is appended with a timestamp and a geotag of the user's location. Opening the geotag will plot the location of the user on a map at the time they made the update along with the pinned location of the scheduled job site, allowing you to confirm that team members reached the job site and left the job site when indicated on the job record.

File and Photo Attachments

Attach files to job records and customer profiles on iOS, Android, or WebApp. Files can be imported from file repositories such as Google Drive or Box, uploaded from your camera roll, or taken directly for the application. Upon uploading the file, they can be renamed and a description can be added. Files attached to the job record automatically roll up to the customer profile so that all customer related files are easily found.



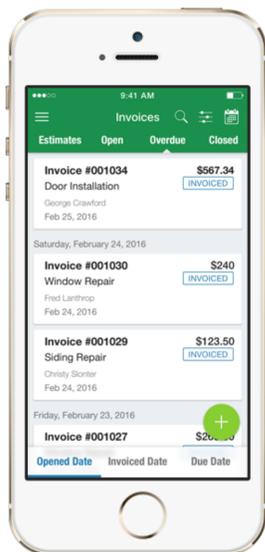
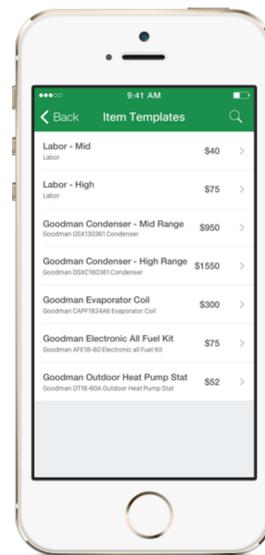


Task Management

The main job record can be further divided into subtasks assigned to different team members with individual due dates, allowing you to further segment the job. Similar to the job record, subtasks have a task name, description, assigned team members, due date/time, and a status field.

Invoice Item Repository

We offer the ability to store commonly used invoice items in a repository called Invoice Item Templates. Invoice Item Templates allow you to quickly insert pre-defined invoice line items into an invoice for faster and easier invoicing. By capturing template name, item name, price, quantity, applied tax, and description fields, unique but similar items can be stored for maximum flexibility.

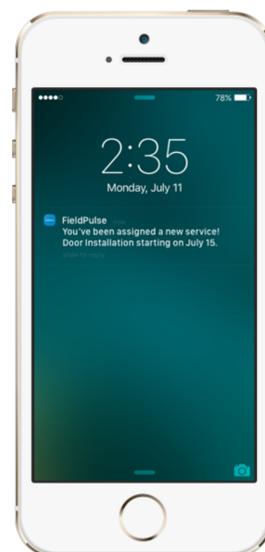


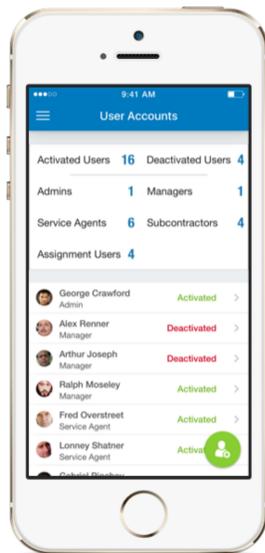
Payment Status Tracking

Never lose track of job payment status with invoice status lists. Easily view open estimates and invoices as well as overdue outstanding invoices to ensure no missing payments get swept under the rug. Stay on top of estimates to follow up on prospective clients.

Job Assignment and Reminder Notifications

Send your assigned team members notifications to their mobile phone when a new job has been assigned to them. With automatic notifications, there's no need to manually dispatch team members. The scheduled job will automatically appear in the assigned team members' schedules. In addition, individually customized settings also allow users to receive an alert for a predetermined set of time before the scheduled job begins to warn them about an upcoming job.





User Roles and Restrictions

Different roles and app permissions give team members different access and functionality based on their job function. Mix and match roles with your team members to align with your business.

Assign the Manager role to create and view team member schedules and activity for greater business insight.

Assign the Service Agent role to limit the scope of their views to keep them focused on their assigned work.

Assign the Subcontractor role to limit exposure to internal customer lists, invoices, payments, and business activity.

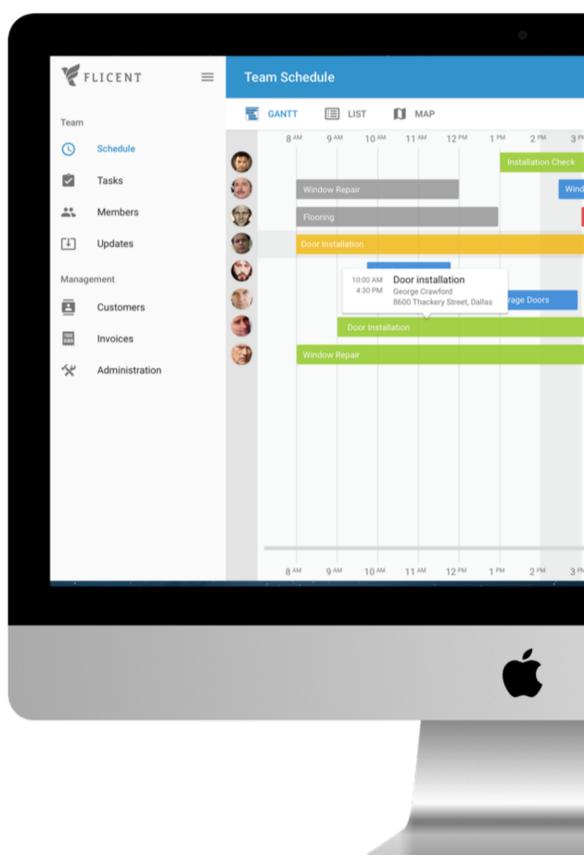
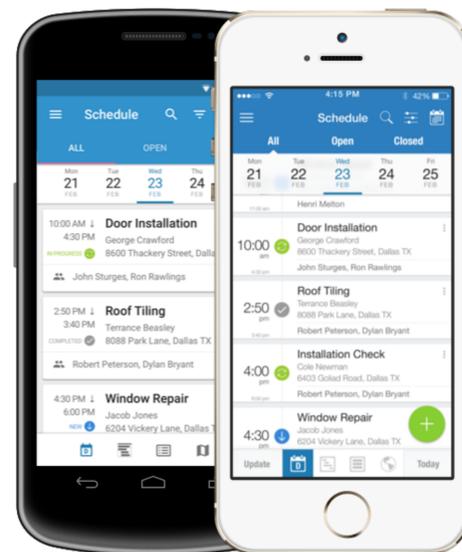
iPhone and Android Native Mobile Apps

Built with a mobile-first design, our mobile apps are fully featured to let you run your business entirely from your phone.

Managers can quickly and easily create customer profiles, schedule jobs, view team schedules, update job statuses, attach files/photos, create and send estimates/invoices, collect payments, and more all from their iOS or Android mobile app.

Field workers can view their schedules of assigned work, update job statuses, attach files/photos, create and send estimates/invoices, collect payments, and more all from their iOS or Android mobile app.

Mobile app schedule views include regular list views, gantt views, and map views with advanced availability based scheduling. View full update and activity feeds on customer and job records. Open and view attached files on customer records and job records. FieldPulse mobile apps are fully featured to let you manage the business on the go and empower field workers to perform their job.



Computer Browser WebApp

The browser based WebApp is designed based on the mobile experience to give the user familiarity as they transition from one to the other. Seamlessly move from the WebApp in your office to your mobile phone on the road without missing a beat. Consistent in design and experience, it allows you to build a process around the software that helps you reach repeatable success in serving your customer.