How to search for the best service software for your company…

Google

If these are your answers…

1. Are you using QuickBooks? ✓ Yes ___ No

2. Do you plan to continue using QuickBooks?
   ✓ Yes ___ No

3. Do you want to learn and be required to use another bookkeeping/ billing program in addition to your QuickBooks every day? (i.e. two bookkeeping programs) ___ Yes ✓ No

Three Types of Service Software

- ☑ **Service Software that connects directly into your QuickBooks is your Best Fit**
- ☐ **Generic All-in-One Service & Accounting Program (Two accounting programs if QuickBooks is required . Daily Sync/ Import to Quickbooks)**
- ☐ **Generic Cloud-Based Subscription Rental Program (Requires internet – Loose history when dis-continue service - Daily Sync/ Import to QuickBooks)**

OPTION #1 --SIMPLE --SEAMLESS --EASY TO USE

Fireline Systems

HVAC and Plumbers Pack

- ✓ Scheduling
- ✓ Customer History
- ✓ Customer Equipment
- ✓ PM- Agreements
- ✓ Mobile Paperless

intuit QuickBooks

- ✓ Create Customer Billing
- ✓ Apply Cash Receipts
- ✓ Daily Bookkeeping

✓ Seamlessly connects to your QuickBooks Customer

✓ Bill/ Invoice Customers in QuickBooks

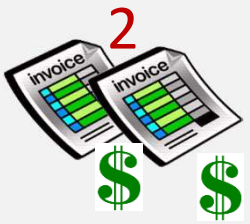
OPTION #2 – Using QuickBooks and Another Accounting Program

All-In-One Program

Designed with Proprietary Accounting Program

(QuickBooks is not needed)

OPTIONAL DAILY SYNC/ IMPORT
-INTO QUICKBOOKS
-YOU FIX ERRORS IN QUICKBOOKS



Do you want two bookkeeping programs ?

- ✓ Learn another bookkeeping program
- ✓ Import your QuickBooks customers
- ✓ Create invoices in the All-in-One program
- ✓ Create cash receipts in All-in-One program
- ✓ Daily Sync/ Import into QuickBooks

Partial list of All-in-One Programs

Wintac

dESCO Service Industry Solutions

Mobilogic
FieldOPS

VERTICAL MARKET SOFTWARE

intuit QuickBooks

Customer invoices in two programs.

OPTION #3 – Cloud Monthly Rental Subscription with QuickBooks

OPTIONAL DAILY SYNC/ EXPORT
-SENDS INVOICES AND CASH RECEIPTS
-YOU FIX ERRORS IN QUICKBOOKS

Not Plugged into your QuickBooks

- ✓ No Software Ownership – Expensive over 5+ years
- ✓ Loose all Customer History when terminate subscription
- ✓ Depends 100% on a fast internet connection
- ✓ Are your customers and financial data secure in the Cloud?
- ✓ Invoices not created in QuickBooks

Fleetmatics Works

coolfront

RazorSync
MOBILE FIELD SERVICE SOFTWARE

FieldAware

servicemax

SERVICECEO

TMS

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One Seamless Service Solution

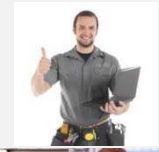
Fireline Systems

HVAC and Plumbers Pack Service Software

intuit QuickBooks®

Pro, Premier, Enterprise

Service Operations Software



- ✓ Scheduling
- ✓ Customer History
- ✓ Work Orders – Service
- ✓ Work Orders -Installs
- ✓ Customer Equipment
- ✓ PM- Agreements
- ✓ Optional - Mobile
- ✓ Optional – Estimating
- ✓ Optional - Lead Source
- ✓ Optional – Job Contracts

Billing Accounting Software

- ✓ Customer Billing
- ✓ Invoice Print/ Email
- ✓ Customer Cash Receipts
- ✓ Accounts Payable
- ✓ Payroll
- ✓ Inventory
- ✓ Purchase Orders
- ✓ Bank Reconciliation
- ✓ Reporting
- ✓ Optional -Estimating

Fireline Systems is an authorized Intuit QuickBooks Silver Developer Partner