How to search for the best service software for your company

Start by answering these simple questions:

1. **Does my company want to continue using QuickBooks to bill our customers and record all of our daily bookkeeping?**
   ✓Yes   ___ No

2. **Assuming that we plan to continue using QuickBooks, does my company want to buy another invoicing and bookkeeping program - and managing two separate bookkeeping programs everyday?   ___Yes   ✓ No**

3. **Does my company want to own their service software and customer history, or just pay a monthly fee to rent it ?   ✓Own   ___ Rent**

There are three types of service software. Which is best for your company?

❑ **Simple Service Program that plugs directly into your QuickBooks**

❑ **All-in-One Service & Accounting Program**
(QuickBooks is not needed. Adding QuickBooks requires daily – Sync to QuickBooks and error resolution)

❑ **Cloud-Based Subscription Rental Program**
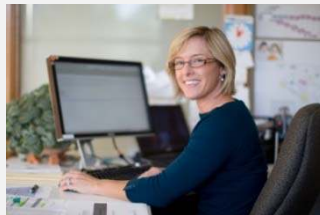(Requires internet – Import – Sync to QuickBooks)

❏ 'All-in-One' Service Accounting Program

All-in-One Programs

Import Sync Daily ←→

 intuit QuickBooks®

All-in-One programs include their own built-in accounting programs. If you connect them to QuickBooks you will need to sync and manage two accounting programs daily.

Two Separate Billing and Bookkeeping Programs
Two Accounts Receivable for Each Customer
Two Separate Books to Reconcile Monthly

Call us for a list of these All-in-One programs. (661) 254-8511

MONTHLY RENTAL SUBSCRIPTION OPTION

❑ **'Cloud-Based Rental Programs**

Cloud-Rental Programs

Import Sync Daily

intuit QuickBooks®

- **No control of your customer data**
- **Open-ended rental expense – expensive over 5+ years**
- **Loose all of your customer history when you stop using the software**
- **Requires a very dependable internet connection to work properly.**
- **Sync to your QuickBooks may be questionable – All error resolution is your responsibility**
- **Company data security and data protection ??**

Two Separate Billing and Bookkeeping Programs
Two Accounts Receivable for Each Customer
Two Separate Books to Reconcile Monthly

Call us for a list of these programs. (661) 254-8511

One Seamless Service Solution

for QuickBooks Customers

HVAC and Plumbers Pack

Service Operations Software

- ✓ Scheduling
- ✓ Work Orders – Service
- ✓ Work Orders -Installs
- ✓ Customer Equipment
- ✓ PM- Agreements
- ✓ Mobile Paperless
- ✓ Tracks Work Performed
- ✓ Optional – Estimating
- ✓ Optional - Mkting/ Adver
- ✓ 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