

# How to search for the best mechanical service program for your company

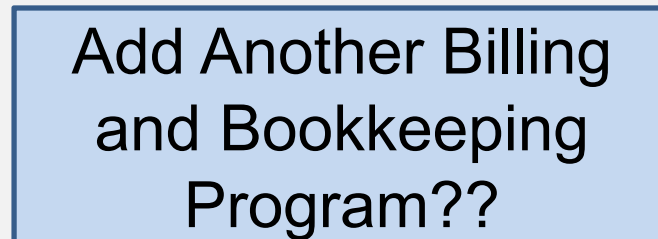


## Start research by asking these questions....

1. Are you using QuickBooks? \_\_\_ Yes \_\_\_ No
2. Do you plan to continue using QuickBooks?  
\_\_\_ Yes \_\_\_ No
3. Would you buy another billing and bookkeeping program if you are already using QuickBooks?  
\_\_\_ Yes \_\_\_ No



#1 Billing/ Bookkeeping Program



#2 Billing/ Bookkeeping Program ??

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#1 Billing/ Bookkeeping Program



#2 Billing/ Bookkeeping Program ??

## Three Types of Service Software



- 1. Fireline Systems HVAC and Plumbers Pack Service** which seamlessly plugs into your QuickBooks for billings,
- 2. Generic “All-in-One” Service Programs** Required to use their proprietary billing and bookkeeping program. QuickBooks not needed
- 3. Internet Cloud-based Programs** charge a monthly rental subscription fee per user. Must import or sync their invoices into QuickBooks.

# Three Types of Service Software

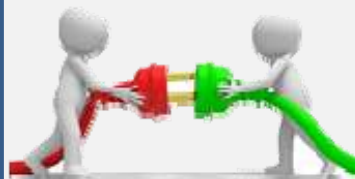


## ❑ 1. HVAC and Plumbers Pack Service

**Program** plugs right into your QuickBooks

Fireline Systems

**HVAC and Plumbers  
Service Software**



intuit

**QuickBooks.**

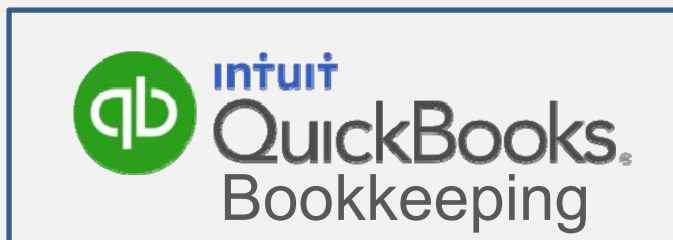
Pro, Premier, Enterprise  
for Windows

*Simple. Seamless. No Duplication.*

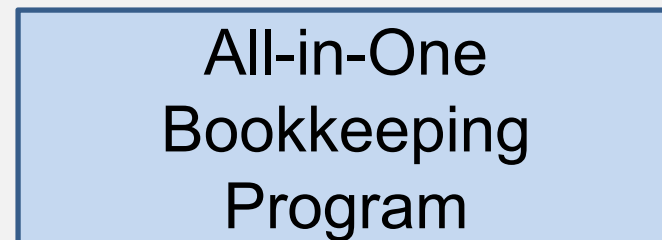
## ❑ 2. Generic “All-in-One” Service Programs

Using QuickBooks means you will have two billing and accounting programs to manage daily.

- Export QuickBooks customers and items to begin
- Bill your customers with their software
- Import or sync their invoices and cash receipts into your QuickBooks daily.
- Correct all import/ sync errors.
- Reconcile your QuickBooks Accounts Receivable with their AR Monthly. Fix all import errors.



CUSTOMERS  
ITEMS



DUPLICATES YOUR CUSTOMERS  
DUPLICATES YOUR ITEMS



❑ **3. Internet Cloud-based Programs** charge a monthly rental subscription fee per user per month.

- No software ownership. *Expensive over 5 years*
- Lose all customer history when stop paying
- Slow or No internet – *Work stops in your office*
- No billing in QuickBooks. **Import or sync** your invoices into QuickBooks. You *fix all import errors.*
- Customer financial info on outside computer

Which type of service program best fits your company's needs?



- #1 Fireline HVAC and Plumbers Pack Service Program** designed for mechanical service contractors that plugs into your QuickBooks
- #2 Generic “All-in-One” programs**
- #3 Generic Internet Cloud-based monthly subscription-fee programs**



# Best Seamless Service Solution

Fireline Systems

**HVAC and Plumbers**  
**Service Software**



intuit

**QuickBooks.**

Pro, Premier, Enterprise  
for Windows

## *Service Operations*



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

## *Billing/ Bookkeeping Program*

- ✓ 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