



Service Fusion Killer Features



Service leaders face new challenges in delivering the best field service every day. From customer service experience expectations to optimal workforce field scheduling and dispatch—that's why we designed Service Fusion's Field Service Management to help you overcome these challenges and make your day-to-day operations easier.

Explore how our products can help you handle Scheduling & Dispatching, Customer Accounts, Communication, Remote Work Operations, and Field Service Mobile App problems and clear time for more opportunities to maximize your ROI and grow your business.

SCHEDULING & DISPATCHING

Problem You need a better process of efficiently scheduling jobs and gain access to your calendar in the office or out on the field.

Solution Scheduling & Dispatching and Team Member Availability.

Easy scheduling & dispatching: discover a full calendar view with a drag and drop dispatch grid to keep everyone on your team organized and reduce double, triple booking entries.

View team members' availability: learn the names of technicians who are dispatched, scheduled, on the way, job assignment details by clicking on the Jobs tab.

Problem You lose track of estimates and miss out on converting them into more jobs.

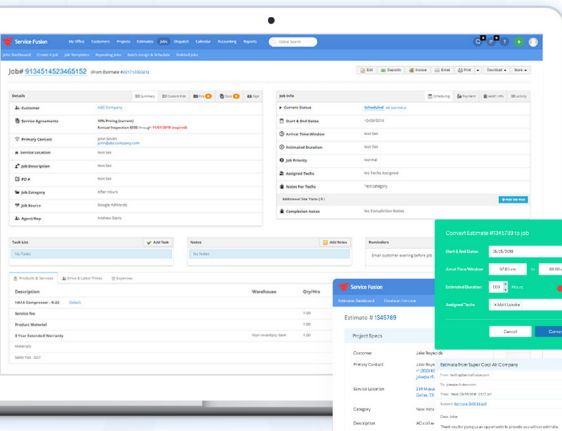
Solution Jobs and Estimates.

Jobs and estimates: easily create new jobs and assign your technicians in seconds, measure win rates, and convert custom estimates to jobs with just 1-click.



2 Convert to jobs.

Once an estimate is accepted, you can quickly convert it to a job in seconds – saving you time and minimizing errors for double entries.



CUSTOMER ACCOUNTS

Problem You don't have your customers' details—from their contact details to their service history to their invoicing and payment history in a centralized, secure place.

Solution Customer Management.

Customer management: house all your customers' information within a secured online repository including job photos, service history, documents, payments and even add virtual sticky notes to customer accounts.

The screenshot displays the Service Fusion web application interface for managing customer accounts. The main content area is titled "AFC Company Data" and contains several sections:

- Account Info:** Fields for Customer Name (AFC Company Data), Parent Account (SF Contractors), Account Number (666-555-1111), VIP Account? (No), Service Agreement? (Yes), and Active? (Yes).
- Service Agreements:** A table with columns for Agreement Name, Effective Date, Expiration Date, Amount, and Description/Notes. One agreement is listed: Gold Membership, 03/01/2018, 03/01/2018, \$ 100.00, /Mo, None.
- Primary Contact:** Fields for Profile (Sam), First Name, Last Name (Smith), Suffix, Phone Number (Mobile: 555-999-0000), Email Address (Personal: samsmith@searffusion.com), Department, and Job Title.
- Additional Info:** Fields for Billing Contact, Booking Contact, Birthday, Anniversary, Web/App Username (samsmith07@searffusion.com), and a Locked? checkbox (Yes).

On the right side, there is a "Recent Notes" section with three entries, each featuring a profile picture and a brief note:

- Mike Kelly - Breaker Box located in second floor in second...
- Mike Kelly - Scheduling for P... coordinated with a month out and before needs to...
- Mike Kelly - Must use back exterior unit

COMMUNICATION

? **Problem** Keeping your customers up-to-date with job statuses is inconsistent.

! **Solution** Text Message Notifications.


Text message notifications: communicate in real-time with your technicians and customers via SMS notifications about scheduled jobs and send on-the-way alerts to your customers.

? **Problem** You don't have a marketing channel to communicate your business messages.

! **Solution** Customer Email Broadcasts.

Customer email broadcasts: run better email marketing campaigns to promote your professional services and grow your business by putting the right emails in front of the right people.

REMOTE OPERATIONS MANAGEMENT

 **Problem** You lack software, time, or budget to run your service business from anywhere.

 **Solution** Field Service Management Software.

Simple, clean interface dashboard: know your business intelligence inside and out and get a 360-degree view of your service business from average revenue to new customers to invoices, and more.

No switching between applications: use one centralized platform to run your service operations across all major business functions.


Easy online invoicing & payments: experience payments differently with FusionPay, an online payment solution built for service contractors to manage finances and cash flow through a unified experience with flat-rate, transparent pricing.

Touchless eSign solutions: accelerate your contracts and agreements with eSign—send and sign agreements securely in minutes, rather than days.

Real-time information: get real-time information about the tasks that are assigned to your technicians and drive top performance metrics.

QuickBooks integration: keep your accounting system up-to-date painlessly with fewer steps and clicks—Service Fusion integrates with both QuickBooks Online and Desktop versions.

FIELD SERVICE MOBILE APP

 **Problem** You lack mobility solutions to push higher productivity and visibility in the field.

 **Solution** Field Technician Mobile App

Field technician mobile app: our mobile applications allow your technicians to complete work orders, prepare estimates, access service history, and present service agreements to customers for their approval with a user-friendly interface.

Any device, anywhere: reduce paperwork and unnecessary trips to the office by offering your technicians a dynamic mobile solution—available on smartphones and tablets that support both Android and iOS operating systems.





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