

Intuit Field Service Management

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Take control of service business with Intuit Field Service Management ES Powered by Corrigo

Today you can go from managing your business to growing it. Intuit Field Service Management can help you to better manage and grow your business by making it easy to move your service company from paper to a web and wireless operation while streamlining your processes.

Quote:

“Brunson Air and Heating continues to grow due to our customer service. Thanks to Intuit Field Service Management ES, we are able to pay close attention to every detail within a certain project and that gives our customers a peace of mind that we are making sure there are no stones unturned.” *Elizabeth Brunson, Owner*



Get More Work Done: Work Order

With Intuit Field Service Management ES, dispatchers can schedule, assign work, and update workers in the field in a split second on their mobile devices. Real time communication between your office and field employees reduces your response time and improve productivity. Proactively manage your work load by balancing request work and service agreement work.



Get Paid Faster: Mobile Payment

Speed up your cash flow, reduce bad debt, and reduce credit card fees by taking payment in the field. Techs can generate invoices for faster invoicing by the back office or take payment out in the field with QuickBooks Merchant Service. Synchronize invoices and payment with QuickBooks Enterprise to keep your books up to date everyday.



Get Payroll Right: Mobile Time Card

Streamline your payroll process by eliminating paper time sheets. GPS location stamp each technician's time card for more accurate reporting. Now you can easily review, approve, population the weekly time sheet in QuickBooks Enterprise, and process payroll.

Link: Smart Scheduling

Smart Scheduling:

Creating a work order in Intuit Field Service Management ES couldn't be easier. No more spending time writing down customer information, service needs, or searching for an available technician. Simply call up your customer's information, assess their needs, and use our skill and priority based scheduling feature to quickly assign the work order to the right tech every time—allowing both your office and field employees be more productive.

Field Service Management ES

Dispatch Board

Work Orders Customers Invoicing Reports People Time Card Settings

Work Order Wizard

1. Customer 2. Problem 3. Assignment 4. Review & Confirm

Find Customer

Find: Customer Name Containing: ad Search

Adam's Candy Shop
Bradley, Adam, (415) 555-5734 Default Work Zone

Best Made Sails
Best Made Sails, (503) 216-4570 Default Work Zone

Details

Site: Best Made Sails Add

Site Address: 725 SE Powell Blvd portland OR 97202 Edit

Service Agreement: No Service Agreement available for this Site.

Contact: Best Made Sails Add

Contact At: (503) 216-4570 Add

Invoicable

PO#:

Entrance code:

Cancel Previous Next

Field Service Management ES

Dispatch Board

Work Orders Customers Invoicing Reports People Time Card Settings

Work Order Wizard

1. Customer 2. Problem 3. Assignment 4. Review & Confirm

New Work Order for Best Made Sails Status: Unassigned

Work Order Type: Approved by Customer

Problem

Category: Common Problems Service: Change Filter Description: Please change filter on rooftop HVAC unit

Work Order Custom Fields

equipment: How did you hear about us?:

Service Activity

| Work Order | Site Service | Equipment Service | Customer Service | Type | Status | Tech | Description |
|------------|--------------|-------------------|------------------|------|--------------------|------------|--|
| WO-0048 | IR | | | R | Waiting for Pickup | ying lu | Common Problems Thermostat not working - stat shows 80 degrees but its actu... |
| WO-0047 | AP | | | AP | Completed | ying lu... | Common Problems Change Filter Change filter |
| WO-0024 | IR | | | IR | Cancelled | ying lu | Electrical Exposed wiring wire exposed in hallway |
| WO-0020 | RI | | | R | Completed | ying lu | Common Problems Change Filter please change filter on rooftop HVAC unit. |
| WO-0020 | RI | | | R | Completed | ying lu | Common Problems Not working AC won't turn on. |

Field Service Management ES

Dispatch Board

Work Orders Customers Invoicing Reports People Time Card Settings

Work Order Wizard

1. Customer 2. Problem 3. Assignment 4. Review & Confirm

New Work Order for Best Made Sails Status: Unassigned

Appointment Date: Scheduled: From: To:

Priority: New Urgent

ETA:

Queue:

Map

Map Satellite Hybrid

725 SE Powell Blvd, Portland, OR 97202

Ying Lu

Cancel Previous Next

Field Service Management ES

Dispatch Board

Work Orders Customers Invoicing Reports People Time Card Settings

Work Order Wizard

1. Customer 2. Problem 3. Assignment 4. Review & Confirm

New Work Order for Best Made Sails Status: Waiting for Pickup

Customer

Customer: Best Made Sails Site: Best Made Sails 725 SE Powell Blvd portland, OR 97202 Contact: Best Made Sails (503) 216-4570 Billing: Invoicable

Problem

Common Problems Change Filter Please change filter on rooftop HVAC unit.

Assignment

SKILL: Apprentice HVAC
Primary Tech: ying lu
Secondary Tech(s):
Priority: Non Urgent
Work Duration: 1 hrs
Appointment Type: Scheduled
Promised Arrival Time: 8/26/2009 2:30 PM
8/26/2009 4:00 PM

Notes

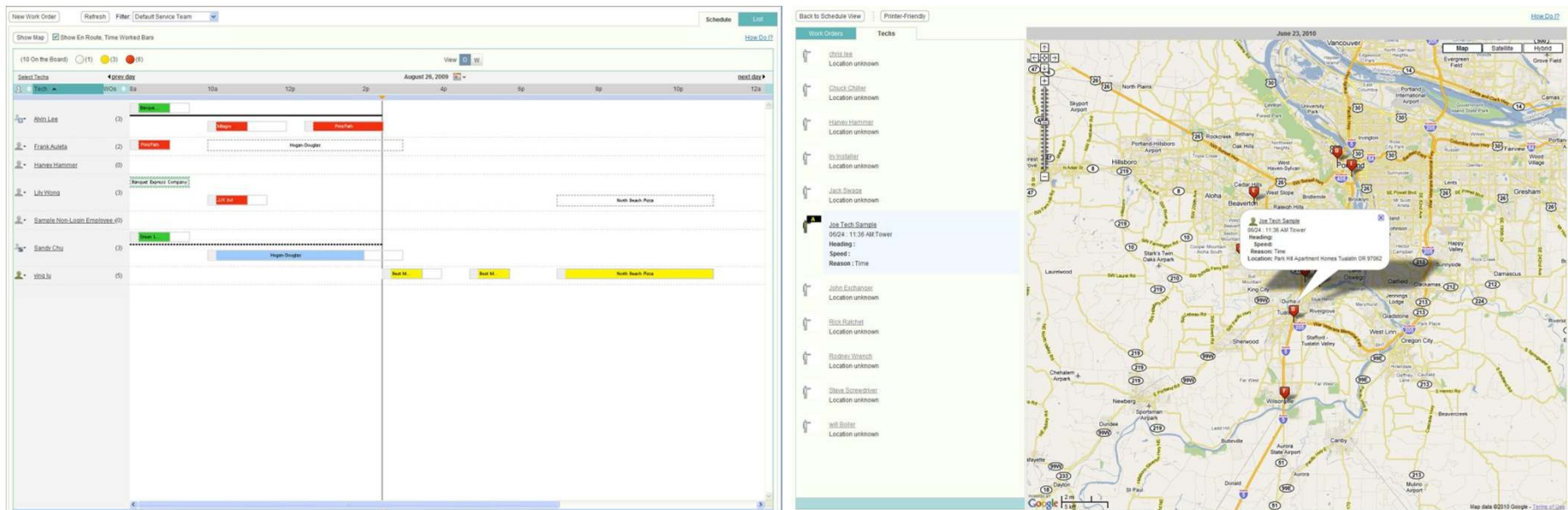
There are no notes.

Cancel Previous Next Finish

Link: Powerful Dispatch

Flight Control:

Intuit Field Service Management ES provides you with a birds eye view of what your technician is working on, their work status, job duration, arrival time, travel time, hours clocked, and current location. Proactively managing your technician's schedule so that they spend more time working and less time driving is as easy as dragging and dropping a work order on our dispatch board.



Link: Service Agreement

Generate Additional Revenue:

Lock in additional revenue by selling more service agreements. Intuit Field Service Management's Service Agreement module can help you better fulfill your service agreement contracts by capturing contract terms, equipment information, auto generating work orders, and preferred tech assignment. Proactively balance your workload by better managing your preventative maintenance schedule. Provide quality work, done right and on time.

The screenshot displays the 'Field Service Management ES' interface. At the top, there is a search bar with 'Find: Work Order Number' and a 'Search' button. A navigation menu includes 'Dispatch Board', 'Work Orders', 'Customers', 'Invoices', 'Reports', 'People', 'Time Card', and 'Settings'. The main content area shows a 'Detail View' for a work order titled 'HST-0015 for Whataburger' with a status of 'Waiting for Pickup'. Below the title are buttons for 'New Work Order', 'Set Status', and 'Printer-Friendly'. The interface is divided into several sections: 'Customer' (Whataburger, 211 West Road, Houston, TX 77032), 'Assignment' (Skill: Apprentice HVAC, Primary Tech: ying lu, Priority: Non Urgent, Work Duration: 1 hrs, Appointment Type: Scheduled, Promised Arrival Time: 8/31/2009 8:00 AM), 'Problem' (Work Order Type: PM, window a/c unit HVAC Tune-Up, with a list of tasks), 'Notes' (8/21 | Service Agreement Scheduler don't come before noon), 'Attachments' (No attachments), 'Work Done' (No data has been entered), and 'Invoice' (Currently not Invoiceable, with a link to 'Make it Invoiceable'). A 'Times Posted' table shows the Primary Tech 'ying lu' with 'En Route' and 'Work' columns.

Field Service Management ES Find: Work Order Number Search Recent Items

Dispatch Board Work Orders Customers Invoices Reports People Time Card Settings

» Work Orders Detail View ? How Do I?

HST-0015 for Whataburger Status: Waiting for Pickup

New Work Order Set Status Printer-Friendly

Customer edit

Customer: Whataburger Contact: Barry Blackberry
Site: Whataburger 281 847 3493
211 West Road Billing: no
Houston, TX 77032

Assignment edit

Skill : Apprentice HVAC
Primary Tech : ying lu
Secondary Tech(s) : -
Priority : Non Urgent
Work Duration : 1 hrs
Appointment Type : Scheduled
Promised Arrival Time : 8/31/2009 8:00 AM

Problem edit

Work Order Type: PM
window a/c unit HVAC Tune-Up
[] Monitor refrigerant pressure
[] Test starting capabilities
[] Test safety controls
[] Clean or replace air filters
[] Clean and adjust blower components
[] Measure for correct air flow
[] Tighten electrical connections
[] Measure volts / amps
[] Lubricate all moving parts
[] Adjust thermostat calibration
[] Clean evaporator coil, if accessible
[] Clean condenser coil
[] Clean condensate drains
[] Measure temperature difference

Notes edit

8/21 | Service Agreement Scheduler
don't come before noon

Attachments add

No attachments.

Work Done edit

No data has been entered

Invoice

Currently not Invoiceable [Make it Invoiceable](#)

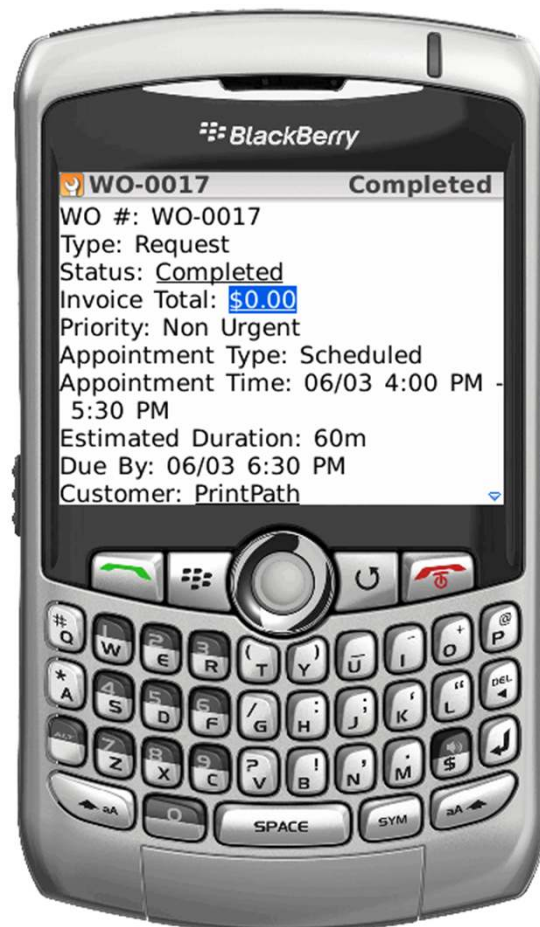
Times Posted

| Primary Tech | En Route | Work |
|--------------|----------|------|
| ying lu | - | - |

Link: Mobile Work Order

Lose The Clipboard:

Break through the paper bottleneck. With Intuit Field Service Management, you trade in your clipboards for mobile devices— so you control processes and information better. This means real time information about work orders and techs' schedules, and faster rescheduling; resulting in more billing time and less windshield time.



Link: Mapping and Locations

Bird's Eye View:

Built-in maps makes tracking your workers and finding customer location quick and simple. Use the built-in map to create efficient routes and quickly assign emergency work orders.

The screenshot displays a web-based mapping application interface. On the left side, there is a sidebar with a 'Work Orders' tab and a 'Techs' tab. Under 'Work Orders', a list of names and their locations is shown. The entry for 'ying lu' is highlighted, showing details: '08/27 : 04:10 PM Full GPS', 'Heading: ', 'Speed: 0.56 mph', and 'Reason: Time'. A location pin is placed on the map at 8209 SW Tualatin-Sherwood Rd, Tualatin, OR 97062. The map shows a large area of the Pacific Northwest, including Vancouver, Portland, and Tualatin. The date 'August 27, 2009' is displayed at the top of the map. The interface includes navigation controls like 'Back to Schedule View', 'Printer-Friendly', and 'How Do I?'. The map also shows various road types, including highways and local streets, and includes a scale bar and a copyright notice for Google Maps.

Link: Invoicing and Price List

Accurate Parts and Pricing for Efficient, Fast Invoicing:

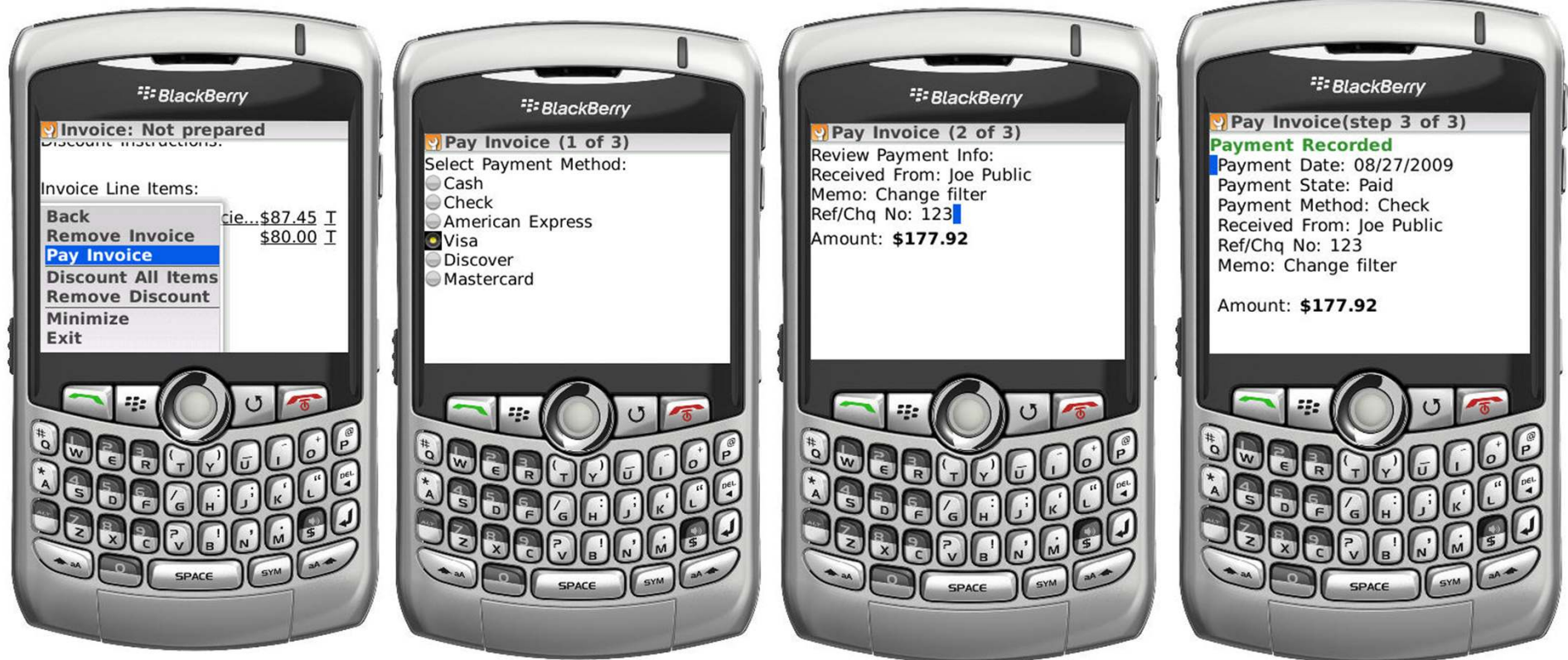
Standardize your pricing by making your parts catalog and price list available for your field techs with Intuit Field Service Management. As your techs close a work order, they can find and add parts to the invoice. Because your parts list synchs with QuickBooks Enterprise, your techs always have up-to-date pricing information, making invoicing a snap.



Link: Mobile Payment Processing

**Mobile Payments Get You Paid on the Spot: Or
Don't Wait to Get Paid, Take Payment in the Field:**

Using mobile payments, your technicians can take payment in the field and you bank your money instantly. There's no waiting, no double entries, and no smudged credit card numbers. Speed up your cash flow and reduce the effort it takes to get paid.



Link: QuickBooks Enterprise

Eliminate Double Data Entry

Intuit Field Service Management fully integrates with QuickBooks Enterprise, so you generate invoices the instant your tech closes a work order — without shuffling paper. Never leave money at the job site again because your technicians capture time and parts at the worksite for more accurate billing.

Quote:

“It’s so easy! From my computer I can pull up a page with different work order types: invoice, warranty, and approvals. Depending on why we’re going out there, I can change the work order where I am. Now it’s never hard to know where we are at on jobs. **It helps us keep track of when my guys complete a work order, then we can use it to create the invoice out in the field so we can get paid faster.**” —Mark Cass, Owner, Rival Electric

Customer Job: [dropdown] Class: [dropdown] Template: [Print Preview] Intuit Service Invoice

Invoice Date: 06/26/2009 Invoice No: WO-0027

Bill To: [Print Path] 1360 Howard St. Decatur, GA 30030

| Item | Quantity | Description | Rate | Amount | Tax |
|---------------|----------|--|---------|---------|-------------|
| SW915 | 1 | Rigid Filter, Filter Efficiency 90-95 Percentage, Capacity 2000 CFM, Initial Operating Resistance (WG) 0.66 Inch | 87.45 | 87.45 | 87.45 Tax |
| TI-trip | 1 | Trip charge | 80.00 | 80.00 | 80.00 Tax |
| Gen. Discount | 1 | | -181.24 | -181.24 | -181.24 Non |
| | | test done__ying | | | |

Customer Message: [dropdown] Tax: Sales Tax (8.25%) 13.81 Total 0.02

To be printed
 To be emailed

Payments Applied: 0.00
Balance Due: 0.02

Memo: [text area]

Save & Close Save & New Revert

Link: GPS Aware Time Card

Stop Wasting Time Processing Your Payroll:

GPS-aware time cards save time and ensure accurate payrolls. Your technicians no longer have to fill out or turn in a paper time sheet. The time card module collects time card information as your technicians interact with their work orders that can be review in real time and integrated with the weekly timesheet in QuickBooks Enterprise for seamless payroll processing with Intuit Payroll. Be confident that the GPS-stamped "when" and "where" is correct for each time card, you spend less time and work reviewing and approving them.

FieldService Management ES interface showing a weekly time card grid for August 23 to August 29, 2009. The grid lists technicians and their hours for each day of the week.

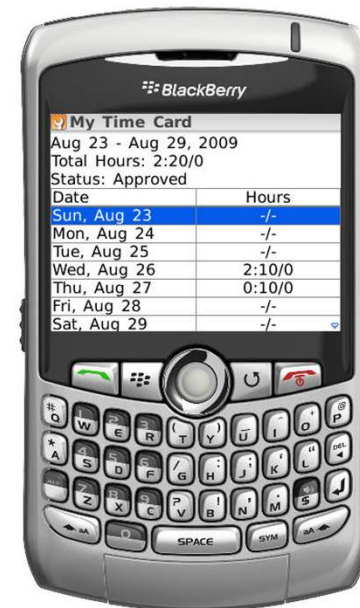
| TECHNICIAN | Sun | Mon | Tue | Wed | Thu | Fri | Sat | Totals |
|-----------------------------|-----|-----|-----|--------|-----|--------|-----|--------|
| Agar, Siddharth | | | | | | | | |
| Bath, James | | | | | | | | |
| Crash, Nishita | | | | | | | | |
| Haque, Hanuman | | | | | | | | |
| Li, Diana | | | | | | | | |
| Li, Gloria | | | | | | | | |
| Nasrullah, Hanuman | | | | | | | | |
| Sarkis, Nona-Loren Estrella | | | | | | | | |
| Sarkis, City | | | | | | | | |
| Uttu, Ju | | | | | | | | |
| Totals | | | | 2:10/0 | | 0:10/0 | | 2:20/0 |

FieldService Management ES interface showing a timesheet for August 24 to August 30, 2009. The timesheet lists customer information, service items, and payroll items.

| Customer | Service Item | Payroll Item | Name | 24 | 25 | 26 | 27 | 28 | 29 | 30 | Total | Wkly Tot |
|--|--------------|--------------|---------|------|------|------|------|------|------|------|-------|----------|
| Andrew Miller and Associates North Beach Plaza | Regular | Regular | WO-0000 | | | | 0:10 | 0:10 | | | 0:10 | 0:10 |
| | | | WO-0008 | | | | | | | | | |
| Totals | | | | 0:00 | 0:00 | 0:10 | 0:10 | 0:00 | 0:00 | 0:00 | 0:20 | 0:20 |

FieldService Management ES interface showing a detailed time card for a technician named "ying lu" for August 23 to August 29, 2009. The detailed view shows work orders, start/end times, and hours.

| Date | Work Order | Start Time | End Time | Hours | RTO/TOT | Totals | Actions | Flag/Message |
|----------------|------------|------------|----------|---------|---------|--------|---------|--------------|
| 8/23 | Sun | | | | | | | |
| 8/24 | Mon | | | | | | | |
| 8/25 | Tue | | | | | | | |
| 8/26 | Wed | WO-0000 | 2:27 PM | 4:31 PM | 2:10 | 2:10/0 | 2:10 | |
| 8/27 | Thu | WO-0008 | 4:10 PM | 4:24 PM | 0:10 | 0:10/0 | 0:10 | Shut Out |
| 8/28 | Fri | | | | | | | |
| 8/29 | Sat | | | | | | | |
| Totals: | | | | | | 2:20/0 | 2:20 | |



Link: Time Card Auditor

Address Time Card Discrepancies Before They Become Payroll Problems:

Don't wait until payroll to address time card discrepancies, do it when memories are fresh. Set up customizable notification rules to be alerted when your technicians turn in a time card that does not meet your rules for an acceptable time card.

FieldService Management ES Find: Person Name Search Recent Items

Dispatch Board Work Orders Customers Invoices Reports People Time Card Settings

Time Card How Do I?

! You have some unapproved data in your previous Time Period. [Click here](#) to see unapproved data in previous period. This Time Card Period is not yet complete.

VIEW: Not Approved Filter: Off

Approve Edit Printer-Friendly

WEEKLY TIME PERIOD Prev Time Period Aug. 23 to Aug. 29 Next Time Period

| | Sun | Mon | Tue | Wed | Thu | Fri | Sat | Totals |
|---|-----|-----|-----|----------|--------------------------|-----|-----|----------|
| Tech | | | | | | | | |
| <input type="checkbox"/> Alvin Lee | - | - | - | - | - | - | - | - |
| <input type="checkbox"/> Beth Janz | - | - | - | - | - | - | - | - |
| <input type="checkbox"/> Frank Auleta | - | - | - | - | - | - | - | - |
| <input type="checkbox"/> Haovey Hammer | - | - | - | - | - | - | - | - |
| <input type="checkbox"/> Lily Wong | - | - | - | - | - | - | - | - |
| <input type="checkbox"/> Lisa Garcia | - | - | - | - | - | - | - | - |
| <input type="checkbox"/> Nazima Bhamani | - | - | - | - | - | - | - | - |
| <input type="checkbox"/> Sample Non-Login Employ... | - | - | - | - | - | - | - | - |
| <input type="checkbox"/> Sandy Chu | - | - | - | - | - | - | - | - |
| <input type="checkbox"/> vng ly | - | - | - | 2:10 / 0 | 0:10 / 0 pm | - | - | 2:20 / 0 |

Warning: Can approve anyway Error: Cannot approve Regular Time 3 / 4 Over Time

Link: Intuit Payroll

Pay Your Team Without Hassles

Intuit Field Service Management's Time Card module and Intuit Payroll makes processing your payroll a breeze. Capture your field staff's hours directly from the field and review it everyday. The Time Card module cut your payroll processing time and work because it automatically populates each technicians weekly time sheet in QuickBooks Enterprise - already broken down into regular, overtime, and double-time.

The screenshot displays the Intuit Payroll Timesheet interface. At the top, there are navigation buttons: Previous, Next, Print, Edit Single Activity, and Let Your Employees Enter Time... The main header shows the Name as 'Andrew Philips' and the Week-Of as 'Aug 24 to Aug 30, 2009'. The title 'Timesheet' is in the top right corner. The table below has columns for Customer:Job, Service Item, Payroll Item, Notes, and days of the week (M 24, Tu 25, W 26, Th 27, F 28, Sa 29, Su 30), followed by Total and Billable? columns. The data row shows 'Andrew Philips and Associates' for Customer:Job, 'North Beach Pizza' for Service Item, 'Regular' for Payroll Item, and 'WO-050' and 'WO-006' for Notes. Time entries are shown for Thursday (2:10) and Friday (0:10). The Total column shows 2:10 and 0:10, and the Billable? column shows 2:20. At the bottom, there are buttons for 'Copy Last Sheet', 'Save & Close', 'Save & New', and 'Revert'.

| Customer:Job | Service Item | Payroll Item | Notes | M 24 | Tu 25 | W 26 | Th 27 | F 28 | Sa 29 | Su 30 | Total | Billable? |
|-------------------------------|--------------|--------------|--------|---------|----------|---------|----------|---------|----------|----------|-------|-----------|
| Andrew Philips and Associates | | Regular | WO-050 | | | | 2:10 | 0:10 | | | 2:10 | |
| North Beach Pizza | | Regular | WO-006 | | | | | | | | 0:10 | |
| Totals | | | | 0:00 | 0:00 | | 2:10 | 0:10 | 0:00 | 0:00 | 2:20 | |

Link: Powerful Reporting

Powerful Reports Help You Manage Better

Know how your business is doing with built-in reporting tools and dashboards. Check staff productivity, revenue, work orders per technician and more. Use off-the-shelf reports or easily create custom reports.

Company Key Metrics



COMPANY KEY METRICS 8/28/2009 12:02:56 PM

KEY PERFORMANCE INDICATORS

| Indicator | Month to Date | Qtr. to Date | Last Qtr. |
|--------------------------------|---------------|--------------|------------|
| No. of work orders completed | 7 | 15 | 23 |
| Total Revenue | \$889.59 | \$3,438.66 | \$5,225.10 |
| Average revenue per work order | \$127.08 | \$229.24 | \$227.18 |

KEY OPERATIONAL METRICS

| Operational data | Month to Date | Qtr. to Date | Last Qtr. |
|--------------------------------|---------------|--------------|-----------|
| New Customers | | | 54 |
| No. of Non-Revenue Work Orders | 2 | 3 | 5 |
| No. of Repeat Customers | 5 | 7 | 4 |

WORK ORDERS AND REVENUE TREND

| Period | Completed Work Orders | Total Invoice | Cumulative Invoice |
|-----------|-----------------------|---------------|--------------------|
| May, 2009 | 7 | \$1,538.02 | \$1,538.02 |
| Jun, 2009 | 16 | \$3,687.08 | \$5,225.10 |
| Jul, 2009 | 8 | \$2,549.07 | \$7,774.17 |
| Aug, 2009 | 7 | \$889.59 | \$8,663.76 |

