

ServiceMax Linx for QuickBooks®

Expedite cash flow and close the loop on service jobs fast



Overview

Still sending your service technicians or engineers to the customer site armed only with a clipboard and no visibility to prior invoices or service records? Unfortunately, nothing could be worse for your business's cash flow. How can you outpace your competitors if your processes are still full of paper, data entry and "phone tag"? That's why service businesses of all sizes are investing in technology to not only ensure that service is delivered flawlessly, but accounted for flawlessly as well.

ServiceMax Linx for QuickBooks® connects ServiceMax's modern, cloud-based and end-to-end field service software solution to your QuickBooks® accounting system, so that you can bill for service in record time. With ServiceMax and QuickBooks®, you can eliminate double data entry and paper, and collect cash faster than ever before. Our customers typically see service to cash cycle times drop from weeks to a matter of days.



What does flawless field service look like?

ServiceMax surveyed our customers in January 2014, and the average ServiceMax customer reported:

26% improvement in productivity due to mobile

22% increase in first time fix rates

14% decrease in costs

Work Order Detail [Edit] [Delete] [Clone] [Sharing]

▼ Service Flow Wizards

Work Order Actions

[Dispatch Technician] [Create Estimates] [Create Usage from Estimates] [Debrief] [Close Work Order] [Generate Service Report]

▼ Basics

Case: [dropdown] Order Status: Closed

Account: Acme Priority: [dropdown]

Contact: Howard Jones Customer Down: [checkbox]

Component: xy123593 Order Type: Field Service

Product: Laptop Computer Purpose of Visit: [dropdown]

Automated Closed Date: 2/17/2014

▼ DBSync Information

Generate Invoice QB Invoice Date: 2/18/2014

QuickBooks Id: 11-1392662861 QB Error: Invoice Updated

Problem Description: [text area]

Export for QuickBooks

Time Frame

From: [3/18/2014] To: [3/18/2014] [Go!]

Choose records from list below and click one of the buttons to Export [Email as attachment] [Export to file]

<input type="checkbox"/>	Account	Contact	Closed On	Total Billable Amount
<input type="checkbox"/>	Lapinata Medical Center	Charles Miller		\$0.000
<input type="checkbox"/>	Burlington Textiles Corp of America	Jim Scott		\$1,599,000
<input checked="" type="checkbox"/>	Zara Inc	Charles Miller		\$0.000
<input type="checkbox"/>	Zara Inc	Charles Miller		\$0.000
<input type="checkbox"/>	Acme2			\$0.000
<input type="checkbox"/>	Computer Devices Corp	Charles Miller		\$325,000
<input type="checkbox"/>	Zara Inc	Charles Miller		\$0.000
<input type="checkbox"/>	Zara Inc	Charles Miller		\$0.000
<input type="checkbox"/>	Zara Inc	Charles Miller		\$0.000
<input type="checkbox"/>	Zara Inc	Charles Miller		\$0.000
<input type="checkbox"/>	Zara Inc	Charles Miller		\$0.000

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Export to QuickBooks®; no double data entry

Consider the following common scenario: Your tech completes billable service and retrieves a signed, semi-legible work order from the customer. The tech then has to physically drop off/mail/fax the paper to the home office, where it is picked up by the accounting clerk who must manually enter the data into at least one, and perhaps several, different computer systems, including your QuickBooks® accounting system. Then a hopefully accurate, but possibly inaccurate, invoice is generated and mailed to the customer for payment. Any discrepancies and you are in a back and forth with your customer as to how much they actually owe for the service performed. Weeks later, you may finally collect the cash.

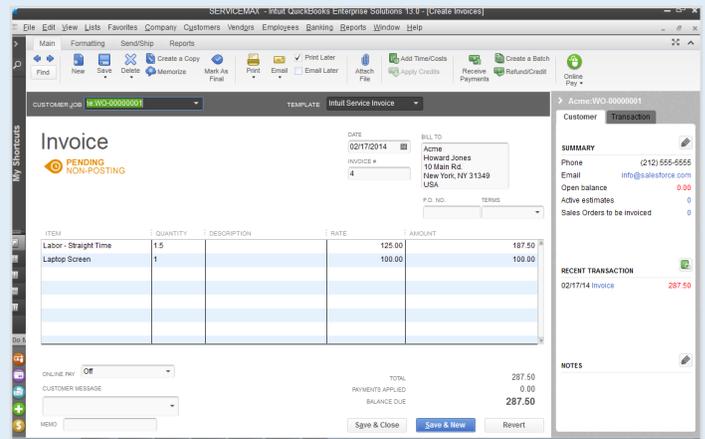
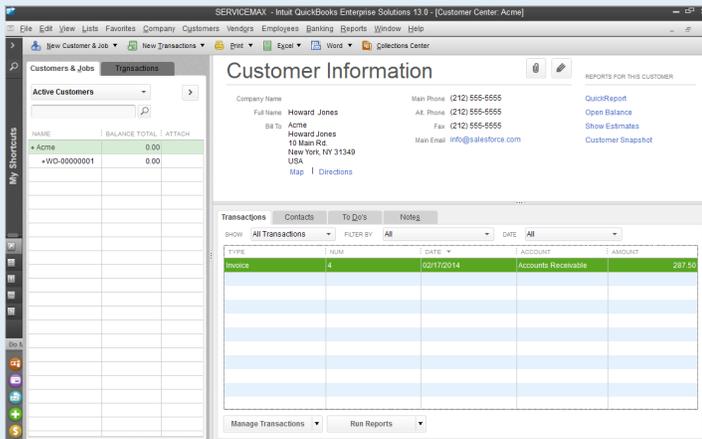
With ServiceMax Linx for QuickBooks®, you can eliminate all these headaches. Technicians enter details once – in the work order details on their mobile device. Invoices are auto-generated from that data, not entered manually several days later. Electronic customer signatures can be gathered while on site using the technician’s iPad or a signature capture device, ensuring the details are accurate while the visit is still fresh in everyone’s mind.

BENEFITS

- Shorten the service to cash cycle with faster and more accurate invoicing
- Eliminate manual data entry and paper, and increase the productivity of your service organization
- Cut costs by eliminating or repurposing data entry personnel
- Increase customer satisfaction by eliminating billing errors and “surprises”
- Gain insights from service revenue and cost data and make better business decisions

FEATURES

- Generate pro-forma invoices that can be presented by the technician for electronic signature while on site
- Automatically create estimates and invoices in QuickBooks® from ServiceMax work order details
- Choose from uni-directional (ServiceMax to QuickBooks®) or bi-directional integration options that fit any budget
- Empower technicians with mobile access to product and service pricing, quoting and contract information
- Empower your accounting team with the ability to view dashboards and analytics on service profitability, revenue and cost



ServiceMax Data in QuickBooks®

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