ServiceCEO
by Insight Direct

A proven, all-in-one software solution for managing your entire service business.

Ready to grow your business and improve the bottom line?

ServiceCEO® is a proven, all-in-one solution for managing your entire service business. The software has powerful features for sales and estimating, scheduling and dispatching, billing and collection, employee and vendor payments, inventory management, and analyzing your business in ways you never have before. With our Job Completion Wizard[SM] and Work Flow Management Center[SM] guiding you though key tasks, and a place for everyone in your company to call home inside the software, it's really easy to use. And because it's built to be flexible, it will adapt to your unique processes, grow with you, and work with your existing systems to become the backbone of your business.

Key Features

Customer Management

Quickly access all customer information from one screen, including estimates, jobs, billing history, personal notes, equipment tracking, service contracts, multiple job locations, and more.

Sales and Estimating

Instantly turn an estimate into a booked job with a single click. Quickly create and email customized estimates with a professional look and feel. View all open estimates on one screen, with follow-up tasks and internal sales logs.

Scheduling and Dispatching

Easily schedule and dispatch all your jobs from a single screen using drag and drop functionality. Automatically optimize routes and generate driving directions. View jobs by day, week, or month. Keep your field staff connected to the back office with mobile options.

Billing and Collection

Instantly turn a completed work order into a professional, customizable invoice. See who owes you money, how much they owe, and how long the invoice has been open. Integrate with QuickBooks to eliminate redundant data entry and reduce errors.

Key Benefits

- Drive more revenue by selling more jobs
- Save time, money, and effort by working more efficiently
- Increase your bottom line by getting paid faster and paying out correctly
- Improve your business through detailed analysis
- Enhance customer service and professionalism

" I really like the way that ServiceCEO adapts to the way my company does business. I did not have to change my business to use the software."

*Larry Wilson, President,
L.M. Wilson Heating and Air*

"The training resources, especially the online classes, are very helpful. They really helped us get up and running quickly and allowed us to get the most out of the software."

*Kevin Hammond, President,
Top Notch Window and Gutter*

Employee and Vendor Payments

Easily pay employees and calculate commissions for sales staff. View and edit payroll information and quickly print payroll reports. View a tabbed screen for all vendor contacts, catalogue items available with pricing, and open and closed purchase order history—linked directly to your QuickBooks vendor records.

Business Analysis

Analyze important business data to improve the overall work and information flow throughout your business. Track and analyze win and loss results to improve sales techniques.

Adapts to Your Business Requirements

ServiceCEO easily adapts to your business—it's used by over 20,000 service professionals in more than 60 industries. The software scales up or down to meet your unique needs and manages even the most sophisticated processes. You can even turn features on and off as needed to allow room for growth. ServiceCEO was developed to work within your existing office environment and works with the latest versions of QuickBooks, Microsoft Office and Windows.

Committed to Your Success

Insight Direct has been in business for more than a decade, has more than 6,000 customers in 28 countries, and continually invests in ServiceCEO to keep your business running smoothly. Our experience, combined with our unparalleled service and support offerings, help you get started quickly and get the most out of your investment.

Through our Interactive Member Center, you have access to 15 – 20 live online classes every week, recorded training videos, the industry's most comprehensive documentation and more. We also provide an implementation checklist developed from thousands of customer implementations, and a personal coach to ensure an on time and on budget deployment. We are the only partner you'll need today and in the future.

An Easy-to-Use Solution

ServiceCEO was developed to be easy for service businesses to use.

- The Job Completion Wizard is an intuitive tool that guides you through key tasks to ensure accuracy and accountability.
- The Work Flow Management Center lets you configure job and estimate entry workflows into easy-to-follow and repeatable steps for service reps to follow.
- There's a place for everyone to call home inside the software where office managers, dispatchers, business owners and more can manage their critical tasks.
- The solution was built using the familiar Microsoft interface and standards so users pick it up fast.

ServiceCEO by Insight Direct *mobile*

Keep your field staff connected to the back office with ServiceCEO Mobile. With our mobile solution you can improve the productivity of your technicians, increase billable hours and deliver superior customer service.

For more Information:

Insight Direct is the leading provider of software for companies that need a better way to manage service delivery. Since 1997, our all-in-one solution has helped more than 6,000 customers in 28 countries sell more jobs, work more efficiently, get paid faster, and analyze their business in new ways. Customers include Bay Area Pool Service, Critter Control, CSI Computer Solutions, Handyman Network, High Efficiency Cooling & Heating, Professional Carpet Systems, R&B Plumbing and Heating and The Maids International.

Worldwide Headquarters

Insight Direct, Inc., 60 Canal Street, Boston, MA 02114
Tel: 1-800-471-4200 Email: sales@insightdirect.com
On the Web: **www.insightdirect.com**

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