



## Service Call streamlines day-to-day activities for Field Technicians

September, 2005

### Company Information:

**Company:** Point of Activity, Inc.  
**Contact:** Donna Ford, Account Manager  
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**Website:** <http://www.pointofactivity.com>  
**Hours & Time Zone:** 8:00 a.m. to 5:00 p.m. EST  
**Established:** 1999 **IDN Membership:** Premier, 2002  
**QuickBooks Integration:** All current versions of Pro, Premier and Enterprise.

### An Interview With

Point of Activity, Inc.

*Handheld solutions are becoming more and more attractive to business owners and since Service Call works with a very broad range of businesses, the opportunity for a ProAdvisor to recommend Service Call is significant.*

*We believe that ProAdvisors are better able to service their clients if they have a broad range of products to recommend.*

**Donna Ford, Account Manager**

### At a Glance:

- *Integrates only with QuickBooks*
- *Streamlines operations*
- *Increases the productivity of Field Technicians*
- *Reduces data entry*
- *Field Technicians have access only to QuickBooks information that they need in order to perform their jobs*
- *Invoices or changes to customer information must be approved by management prior to being imported into the company data file*

### Why was the product, Service Call, developed?

Point of Activity **Service Call** is a handheld solution for Field Automation. It streamlines their operation, increases productivity, reduces data entry, and related errors for any service-related industry.

### Who is Your Target Market and Why?

Our target market is vast, simply because there is such a wide range of service-related industries. However, **Service Call** would be an appropriate solution for landscapers, pool and spa maintenance, mobile computer repair, electricians, heating and air conditioning, etc.

### How Does Service Call Work?

**Service Call** is comprised of two PC applications: *Scheduler* and *Gatekeeper*, and a Pocket PC application, *Service Call*. It offers a complete package that enables Dispatchers to schedule appointments for their Field Technicians, which are then synchronized onto their Pocket PC's.

Field Technicians, in turn, are able to service their customers using handheld devices to include completing estimates and/or invoices, capturing signatures, collecting payment information, and tracking job time.

At the end of the day, after synchronizing their Pocket PC's, management can then use *Gatekeeper* to validate the work completed in the field. Invoices are then approved and processed directly into the company's QuickBooks file.

For more information, visit [www.pointofactivity.com/service\\_call.htm](http://www.pointofactivity.com/service_call.htm)

### Who is your competition and how does Service Call differ?

There are several competitive products that target the service industry. Some of the competitive products attempt to “place” QuickBooks on the handheld. **Service Call** is designed for multiple technicians to increase their productivity in the field and perform their day-to-day activities in a more streamlined fashion.

As a result, **Service Call's** integration with QuickBooks ensures that Field Technicians have access to only the information that they need in order to conduct their jobs. They are not exposed to QuickBooks information that they do not need to see.

#### *Gained efficiency*

*This is our third season using Service Call software. I can't imagine running our business without it. The software has made us more streamlined and more efficient.*

*When I think back to how much time I spent shuffling papers, I am horrified! I had to write out, by hand every day the schedules and the service tickets. Our technicians would then write out what they did on the service tickets, and then I would have to translate their writing to enter the tickets into QuickBooks. It was a long, time-consuming process. Now they pick up their schedules in less than 5 minutes and transfer back their daily work in about the same amount of time.*

*Invoices are processed easily and sent out the next day.*

### QuickBooks Integration:

**Service Call** shares Customer, Item, and Employee Lists with QuickBooks. Invoices that are created using Service Call or changes that are made to customer information, such as phone number or address, must first be approved and processed through Gatekeeper by management, thus assuring the integrity of the company's QuickBooks data file. In addition, by sharing only the relevant information above, privacy of the QuickBooks financial data is assured.

### Installation & Setup:

Installation can be completed in approximately one hour, following the instructions provided in the Installation and Setup guides.

Point of Activity provides a live demo prior to purchase, complete documentation for all three components, and personal technical support.

### Demonstrations & Trials:

Demonstrations are available using “gotomeeting”, which enables prospects to see all three components of **Service Call** in action. The demo includes an overview of Scheduler, the creation of an appointment, synchronization of the appointment to the Pocket PC, and completion of an invoice using the handheld, including signature capture and payment collection. The demo is available at [www.pointofactivity.com/live\\_demo.htm](http://www.pointofactivity.com/live_demo.htm)

### Pricing, Support, Enhancements & Updates:

**Pricing:** 1-User license - \$495.00, 5-User License - \$1,995.00. Leasing options are also available. All purchase methods include Scheduler and Gatekeeper.

**Support:** First Tier Technical Support is provided by an Account Manager. Second tier Technical Support is provided by one of the software developers.

**Enhancements:** **Service Call** is continually enhanced based on customer needs provided via feedback. These types of updates occur 3-4 times a year, on average. Our most recent update occurred in July 2005, when we released a wireless version of Service Call.

**QuickBooks Compatibility Updates:** Updates for the newest version of QuickBooks are available as soon as the QuickBooks products are available. This is one of the many benefits of being a Premier IDN Member; Point of Activity is able to conduct Quality Assurance Testing on pre-released versions of QuickBooks to ensure **Service Call's** successful integration prior to the version's release to the general public.

### *How can Service Call help Advisors with their clients?*

*We believe that ProAdvisors are better able to service their clients and gain client loyalty if they have a broad range of products they can recommend. Handheld solutions are becoming more and more attractive to the business owner and because **Service Call** works with a broad range of businesses, the opportunity for a ProAdvisor to recommend **Service Call** is significant.*

*Point of Activity offers a Referral Program as well as a Reseller Program. For further information on these programs ProAdvisors may call 866-222-4484.*

### Closing – What is the most important point you would like to make?

Point of Activity is a software development company providing mobile solutions. In addition to having an off-the-shelf product for field automation, **Service Call**, as well as one for beverage distribution, *Market Activity Tracker*, we also offer custom software development, consulting and technical writing services.

We use the latest technologies and have a highly skilled staff of professionals who work diligently to "stay on top" of advances in the mobile and wireless arena. Our solid client base and long-term, established relationships with *Government Agencies* and *Commercial Enterprises* has secured our place, among others, in our field.

We are committed to satisfying our customer's needs.

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