

Mobile Devices Overview

Intuit Field Service Management (“IFSM”) has a browser interface for both service manager/dispatcher roles, and mobile application interface for field technician roles. The software components are designed for the different user roles. The mobile application was built from the ground up to enable service technicians to use the system where they need it - in the field.

Mobility options include smart phones, tablets, laptops, and to a lesser extent plain old mobile phones that can receive text messages. As a subscriber to the system, you can standardize on one device across your fleet or mix and match to meet individual needs. Additional information about IFSM, as well as live web seminars and demonstrations, can be found online at: <http://enterprisesuite.intuit.com/products/field-service-management>

Choosing the right devices

While service technicians can log into IFSM from a laptop and browser, most subscribers prefer to use our mobile app for its increased portability, as well as GPS and signature capture capabilities. The mobile app for IFSM works on all Apple and Android phones and tablets, as well as older Blackberries and Windows Mobile (v5, 6, 6.5). Each platform offers slightly different features in the software and on the devices themselves. Review the tables that follow (Page 2) to decide which platform you will need, and then select a device best suited to your needs. IFSM is carrier-neutral, so if one tech prefers an iPad from AT&T and the other tech prefers a Blackberry from Verizon: No problem! Just download and install the appropriate app onto the device, and then log into the app.

Understanding Credit Card Processing

IFSM mobile app and browser interface comes with seamless integration with “QuickBooks Merchant Services with Web Store”. To activate this for your team, call Intuit @ (877) 212-6771. Seamless integration means you can use our mobile app to create an invoice for the work order using items and services, etc. The app calculates the tax and shows the total. You can manually enter the card info and we’ll process the card on all Apple and Android devices, get the payment authorization, and then send the invoice from the field into the QuickBooks marked ‘Paid’. At this time our mobile app also uses a Bluetooth connection to certain mobile card swipers with built-in receipt printers, but these only work with older mobile devices such as Blackberries and Windows Mobile (5, 6, 6.5). If you want to process credit cards via card swipe, please use these older devices if you want an integrated solution. You can also use GoPayment.com, however, the invoice will need to be manually associated with the payment inside QuickBooks because there is no integration between GoPayment and the IFSM app at this time.

Supported Card Swiper/Receipt Printer units
Zebra (4" wide paper) RW420
Citizen Systems (2" wide paper) CMP-10BT-USM

Feature Support by Platform

Features	Apple devices with Cellular data connection (App)	Android devices with Cellular data connection (App)	Windows Laptop or Netbook (Browser)	Blackberry App	Windows Mobile v5, 6, 6.5
Receive work order alerts via mobile app	X	X	X	X	X
Process work orders	X	X	X	X	X
Process Service Agreement work orders (add-on)	X	X	X	X	X
Capture time for payroll (add-on)	X	X	X	X	X
View work order details	X	X	X	X	X
View and add text notes	X	X	X	X	X
View and add photo notes	X	X	X	X	X
Send device GPS location from the field on WO actions	X	X		X	X
Driving directions (link to device maps tool)	X	X	X	X	X
Price up invoice	X	X	X	X	X
Capture electronic signatures (work order, invoice)	X	X		X	X
See work orders where I am a helper	X	X	X	X	X
See and manage work assigned to others (team work)	X	X	X	X	X
Reassign work orders	X	X	X	X	X
Search for work orders	X	X	X	X	X
Create a copy of a work order	X	X	X	X	X
Create a new customer	X	X	X	X	X
Additional desktop features by role			X		

Understanding Printing in the Field

IFSM is designed to help your business capture information electronically and go paperless. However, IFSM can print work orders and invoices via the browser interface and payment receipts can be printed from Blackberries and Windows 5, 6, 6.5 via supported Bluetooth card swipe/printer units (see Page 1). You can also email work order documents and receipts to your customer from our mobile app - and let the customer print them, if necessary.