## *The one solution for everything for most types of Service Businesses*

World class technology and functionality that's easy-to-use on any device. Professional grade at a low price. Intelligent sales, marketing, and customer Service, simple-flow innovative service Job/Project visual controls, internal and external resource management, customer & partner website portal access, all... with real-time accounting and business school management tools.

### Total**Serv** *Pro* – The One End-to-End Service Business Solution That Your Business Needs

TotalServ Pro (TSP) is a complete end-to-end services-business solution, leveraging Microsoft's advanced business technologies including Dynamics 365 (CRM), Azure Machine Learning, Cortana Intelligence, Office 365 productivity tools, innovative and intelligent proprietary visual service planning, tracking, and management tools, state of the art web technologies, and is available on all popular systems and devices. TSP is the complete solution to manage sales and marketing, order and job processing online or in-person, continuously improve customer service, service execution performance from the simple to the complex, and real-time financial performance controls and analysis.  The one solution to manage everything better, to be intuitive and easy to start using companywide, and at a very affordable price point.



Easy End-to-End Complete Service Business Management in the Cloud & Supported for Success

Owner Sr. Manager — Sales & Online — Scheduling Manager — Internal or On-Demand Resource — Customers Anywhere — Finance Manager

On-Demand — Anywhere — Live Support — Any Device

Online & Direct Sales — Request-to-Quote — Order-to-Job — Resource Scheduling — Time & Billing — Customer Satisfaction — Financial Analysis
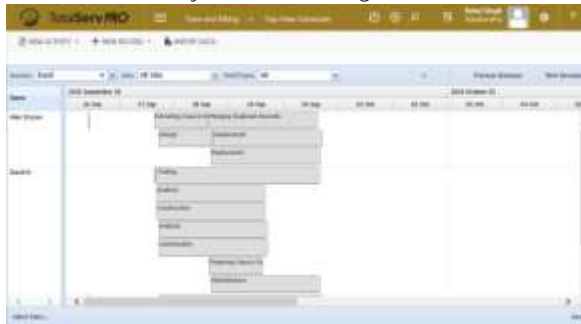
Productivity — Commications

### A Modern Age of Services Offerings, Planning, Tracking, and Execution is Born

Implemented across web access and a wide variety of devices: mobile, desktop, and big screen, TSP manages the customers' services request requirement in the way the customer understands it and relates it. TSP takes this and converts it automatically to the Job tasks and resource requirements and assignments in a forecast to instantly quote and manage resource allocation to determine a quotable timeline and allocate the resources against live work in forecast while sending an email with a link to your website to allow the customer to review, accept, and pay for the service order.

Upon acceptance and/or payment, TSP launches the job and begins exposing the schedule in an appropriate timeframe for the resources allocated. And TSP begins showing the live activity online to the customer, as well as internally presenting prioritized performance analytics to your team.

## TSP's Advanced Features Include:



- Fast-flow Template Job Quote Forecast Order Management
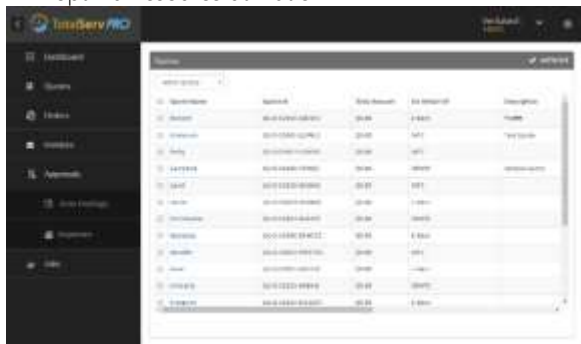  Create Active job forecast, assign resources & add new estimated hours the opportunity



- Customer Web Portal
  Customers can view their invoices & make payments directly through this portal
- External On-Demand Resource Web Portal
  External resources can view their tasks and get started by accessing this portal
- Integrated Accounting & Financial
  Fully integrated financials for meeting your unique business needs
- Alert & Just-in-Time Email Notification
  Email notifications to keep all your people informed on day-to-day activities
- Resource Time Posting Approval System
  A transparent & flexible resource time posting approval system for optimal resource utilization





- Management-by-Exception Dashboards
  View total no. of active jobs/job tasks, delayed jobs/job tasks, time postings, expenses & issues at a single glance.
- Leading Customer Relationship Management
  TSP leverages Microsoft's CRM to help automate your sales, marketing and customer service.
- Job Gantt Resource Scheduling
  Add jobs/job tasks on the fly and assign resources, avoid resource conflicts, view data in graphical format.
- Top-View "All Activity" Scheduler
  View jobs/job tasks and resource availability across the company
- Expenses Management
  Expenses that occur during activity performance can be captured and invoiced for billing.
- Intuitive Task Board
  Track the status of the jobs/job tasks from start to end.



## Launch TotalServ Pro Easily and Start Your Future Instantly...

TotalServ Pro is easily launched and set to your business particulars from the Microsoft AppSource. Select TotalServ Pro and start a live trial instantly. Work with the TotalServ Po set-up and performance assurance  current practices and processes or consult the TSP Team on ways to do more, better.  The TSP Team will assist you in migrating and building all of your data with you quickly for a very easy transition to your future.  For existing Microsoft Dynamics 365/CRM and Office 365 users the TSP Team will help implement to your current systems.