ServiceM8 Packages

	ServiceM8 Starter Package	ServiceM8 Business Essentials	ServiceM8 Premium Package
Prices & Bonus Jobs			
Cost of package value	$1,175	$2,350	$3,450
Discounted price when ordering now	$995 (15% off)	$1,995 (20% off)	$2,750 (25% off)
Initial Consultation			
Initial Consultation to discuss your setup requirements **Highly recommended initial consultation which aims to:** • Determine the suitability of ServiceM8 for your business • Verify the compatibility of your current accounting system and mobile devices • Conduct an analysis of your current business work flows • Determine how ServiceM8 can best integrate into your business • Determine which inefficient practices will be replaced by ServiceM8 • Document your needs for custom fields, templates and/or forms • Assess your current method of recording inventory and advise on what is required to prepare for integration with ServiceM8 • Discuss/document any additional customer requirements, including Security Roles and Add-on features. This process enables us to determine the suitability of ServiceM8 for your business, and in some cases, prevent you from implementing a system which may not be suited to your needs. It also allows us to scope out your exact requirements so that we can provide you with an accurate Estimate of Cost, on choosing to use us to implement ServiceM8 into your business and provide training to your staff.		✓	✓
Account Setup & Customisation			
Complete Setup & Configuration of ServiceM8 Account Portal • Back-end configuration of ServiceM8 account • Setup staff and assign security roles • Assist with import of clients and inventory records • Setup Accounting system integration • Customise Quote template • Customise Invoice template • Customise Email template	✓	✓	✓
Training			
Training Module Included	**2Hrs Included**	**Choice of 3**	**All Modules**
ServiceM8 Settings for Productivity		✓	✓
Dispatcher Training - Getting the Basics	✓	✓	✓
Dispatcher Training - Advanced Features		✓	✓
Accounts Training		✓	✓
Field-Worker Training		✓	✓
Ongoing Support			
As with all new products and software, it takes some time to become fully comfortable and knowledgeable. I will be available to answer any questions and provide support via email, phone & skype.		**Up to 2hrs** (1month max)	**Up to 5hrs** (1month max)

Hourly Rate of $99/hr also available if you've done most of the setup yourself or want advice/support or setting up custom details & forms.

ServiceM8 Settings for Productivity

This module aims to assist customers who need further assistance to configure ServiceM8 back-end settings to deliver greater functionality and optimise usage of the system; or, who have setup ServiceM8 themselves, but feel that things aren't working correctly.

- Add-Ons
- Setup of Recurring Jobs
- Setup of Partial/Progress Invoicing
- Setup of Job Templates
- Staff Security Roles

- Job Categories
- Setup of Inbox
- Customisation of Badges
- External Calendar Sync
- Automatic Feedback requests

Dispatcher Training - Getting the Basics

This module has been designed to teach operators how to use the ServiceM8 Dispatch Board in the correct manner for best efficiency. Ideal to ensure users don't develop bad habits, you will learn:

- How to Create new jobs (Quotes & Work-orders)
- How to create new, & update existing customer details
- Job dispatch & scheduling
- Queuing jobs and quotes
- Convert quotes to work-orders
- Job coordination & monitoring via the Dispatch Map

- How to Locate staff in the field in real-time
- How to use job filters
- How to print work-orders
- How to update the Job Diary & enter special instructions
- How to Create a job checklist
- How to Attach documents to jobs

Dispatcher Training - Advanced Features

This module builds on the items covered in the Basic training module above and will cover some of the more advanced features of the Dispatch Board, introducing a number of concepts to further enhance your productivity and efficient use of ServiceM8. You will learn how to:

- Schedule multiple resources (scheduling for teams)
- Create and use Job Templates
- Setup Basic Recurring Jobs
- Setup Advanced Recurring Jobs
- Setup and use Badges

- Setup Job Reminders
- Automatically generate Email or SMS reminders for customers
- Setup/explain how to use the ServiceM8 Inbox
- Updating the Customer Diary
- Setup a system for customers to email purchase orders directly into ServiceM8

Accounts Training

This module is aimed at staff who are responsible for the accounting or bookkeeping function within your business. It aims to cover all the billing and accounting integration aspects of ServiceM8 and your accounting system. In this module, you will:

- Gain a thorough understanding of how ServiceM8 "talks" to your accounting system
- Understand which items do and which do not synchronise
- Go through the Invoice Approval process
- Learn how to process completed jobs and send invoices to customers via email, SMS or post

- Learn how to raise partial/progress invoices
- Learn how to raise invoices for deposits
- Go through best practice for processing credits and discounts
- Discuss best practice for applying customer payments
- Go through ServiceM8 reports (if time permits)

Field-Worker Training

This training module is designed to get your field workers up and running quickly so they can get back out into the field. They will be fully trained on how to use the ServiceM8 Mobile App, to complete a job from start to finish, and includes:

- Raise new jobs
- Create quotes in the field
- Get to jobs using ServiceM8's turn-by-turn navigation
- Job Check-In process
- How to complete Forms
- How to complete Job Checklists

- How to add Job Completion notes, text notes & photos
- How to add charges to an invoice for parts and labour supplied
- How to reschedule jobs to self or others
- How to capture client's signature
- Run through the Job Check-Out process, including: how to record payment methods & issue invoices (if applicable).

Notes regarding Setup & Training Packages

1. These packages may not be suitable for companies who have unique and/or complex implementation requirements, which may require a greater degree of analysis, design, customisation and training, to get ServiceM8 working suitably for them. In these situations, we would provide a custom quotation.

2. Package prices above and custom quotations are based upon the information we have received from you regarding your needs and current systems. The actual fee may vary if any of your requirements change during the engagement, or if we discover that our initial understanding of your requirements were inaccurate at the time of quoting, or if any additional work is required to bring your systems into line with ServiceM8's requirements. These may include such items as: assisting you with correct setup of your inventory lists, upgrading your accounting system to a version compatible with ServiceM8, assisting with any local PC or general IT issues, etc.

3. Each training module is designed to run for a maximum period of 2 hours each. If at the conclusion of the allocated time, you feel that more time is needed to complete your understanding, then we are happy to continue, subject to our availability and your acknowledgment that additional fees will accrue at our standard consulting rate.

4. Up to five (5) users may participate in any training course. In our past experience, more than five participants create an unmanageable setraining environment, which becomes counter-productive to you. If more than 5 staff need to be trained in a particular topic, additional sessions will be required, at our standard hourly consulting fee.

5. Correspondence & training will be done remotely via phone, email and Skype. Dunedin based businesses will have on-site training at your office location. Anyone outside of Dunedin, may choose to have on-site training &/or work in which case you will be quoted a travel amount to be covered in addition to the package / hourly price.