

Smart Service by My Service Depot



Product Name

Smart Service by
My Service Depot

Reviewed By

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Date Reviewed

April 2009

Summary

If you are looking for a field service module add-on for QuickBooks and are not looking seriously at Smart Service, you absolutely should! My Service Depot, the manufacturer, has done nothing short of an excellent job in the development of this product.

Functionally, the program is so feature rich and flexible, yet easy to learn and use, that most any field service industry operation that adopts it should start seeing immediate benefits. Those benefits are not limited only to increased efficiencies in the areas you might immediately expect like scheduling, dispatch, work order generation and billing, but in areas such as contact management, marketing, sales, estimating, asset management and more; all of which should lead to increased productivity and customer satisfaction.

The integration with QuickBooks is real time and works great. Plus, Smart Service appropriately updates most everything you would want or expect. As of this writing, Smart Service will work with QuickBooks 2004 to 2009 Pro, Premier and Enterprise.

Strengths

This application is simply too strong across the board to highlight specific features. However, the high level strengths that I experienced in the course of my review included:

- **Flexibility** – Smart Service is adaptable enough to meet not just the needs, but also the wants, of most any field service operation.
- **Functionality** – It doesn't just do what you would expect for field service management, it does so much more and it is easy to use.
- **Add-ins** - If the functionality you need does not exist in the base product, it is likely addressed in one or more of the add-in products. Offerings exist for GPS tracking, mobile phone and field laptop solutions.
- **Installation Assistance** – My Service Depot provides remote assistance with the initial install and fully tests the product to ensure everything is working properly before you begin- and it is included in the cost.
- **Training** – My Service Depot provides a good deal of remote access training which is included in the price of the software. This training is not just tailored to the type of field service operation you run, but is also focused on you run your business.



Overall Rating

9.5

- **Ease of Use*** – Navigation is a snap.

* Ease of use does not refer to setting up the system. This is not a product that you would simply have delivered to your doorstep, install and start using. Extended flexibility and functionality mean you will need to use the planning, installation and training assistance provided by the software manufacturer to help you get this right.

Limitations

The fact that prospective customers and estimates are not shared by Smart Service with QuickBooks is something we really like. However, this does seem to eliminate the ability to convert estimate line items into purchase orders and we could find no purchase order functionality within Smart Service.

Wish List

- A negative inventory warning when creating work orders where inventory parts are used that will drive inventory negative.
- Reporting on inventory requirements based on existing estimates, work orders and open purchase orders.
- A purchase order function that feeds into the QuickBooks purchase order system.
- The printed documentation is a bit dated and in need of revision.
- Currently there is a color coding system that can be used, but there is not a built in legend to go with that. We would like to see a user defined legend template added.

Product Ratings	Rating	Ratings Definitions
<p>Setup and Installation: Smart Service uses a Microsoft Access back-end and can either be installed at your location, or can be hosted by My Service Depot. Either way, assisted remote setup is an included benefit with the purchase of the software and was handled extremely well. The actual installation was scheduled and the representative called in when promised and walked through all of the facets of installation and setup, including testing the integration functionality with QuickBooks. The process only took about an hour from start to finish, including customizing the software default settings to address specific business needs.</p>	9.8	<p>10.0 (Perfect): This exceedingly rare score is reserved for a product that is as perfect as it could be.</p> <p>9.0 to 9.9 (Spectacular): A product that receives a rating in this range succeeds at meeting all of its intended users' needs and has no meaningful drawbacks.</p> <p>8.0 to 8.9 (Excellent): A product that receives a rating in this range is superior in so many ways that its relatively few drawbacks are not very important.</p> <p>7.0 to 7.9 (Very good): While the strengths of a product scoring in this range certainly outweigh its weaknesses, it has some minor faults that certain users should be aware of.</p>
<p>Interface: We had absolutely no problems with the interface to QuickBooks during our testing and review.</p>	9.5	<p>6.0 to 6.9 (Good): This range represents a product that is above average. Its strengths slightly outweigh its weaknesses, making it good for most uses but not a standout.</p>
<p>Features: A package of this nature needs to be feature rich and this one is. There simply are too many great features in Smart Service to list them all. However, the following are a few that really seemed to stand out:</p> <ul style="list-style-type: none"> • Customer Management – Organizationally and functionally strong enough that you might almost consider it a complete CRM package in itself. • Scheduling - Flexible and complete with easy access from logical locations in the software. Information appears seamlessly on <i>Work Orders</i> and on the <i>Dashboard</i>. • Work Orders - Customizable and flexible. Designed to work like you do. Easily print out or email to technicians, including logical routing with several great mapping options to choose from. • Estimating - Easily create estimates for prospective customers. Simply click to convert prospect to customer and schedule the job. Prospective customers do not go to QuickBooks and clutter up the customer list. • Preventive Maintenance Scheduling – Recurring jobs, plus easily add one-time billing related activities for easy invoicing. • Equipment Tracking – Including location, model, serial number, installed date, warranty info, status, notes and more. 	9.5	<p>5.0 to 5.9 (Average): A product that scores in this range is functional but unremarkable.</p> <p>4.0 to 4.9 (Mediocre): Products in this range are below average. They fall in the middle of the pack for most features, but suffer from a few additional major flaws.</p> <p>3.0 to 3.9 (Poor): A customer should probably not consider purchasing a product in this range or lower. There may be one or two specialized circumstances, however, that could justify the purchase of this product for a very low price for a specific demand.</p> <p>2.0 to 2.9 (Terrible): A product that receives a rating in this range does not satisfy any of its intended users' needs and has no meaningful strengths.</p> <p>1.0 to 1.9 (Abysmal): A product in this range should never have been produced. This product has no redeeming qualities and worse, may actually harm the user or the user's productivity.</p>



- **Asset Tracking** – Track your equipment, including scheduled maintenance, history, staff assignments and more.
- **Dashboards** – User dashboard with scheduled jobs, to-dos, phone calls, call aheads and reminders. Owner dashboard with numerous at a glance helpful essential graphs and reports.
- **Marketing Campaign Management** – Track costs and results, includes mail merge functionality that flows back into customer/prospect history.
- **User Audit Log** – Complete tracking of what and when things were changed and by whom either at a glance at the field level or using reports.

Ease of Use/Service and Support

9.5

In terms of navigation, ease of use is great. The primary user interface is built around a set of fixed tabs which appear across the top of the screen. These tabs intuitively lead you to the features you would frequently use in the application. That is not to say there is only one way to access a specific function. It is clear that both thought and effort went into designing the interface so that navigation between related functions would be a simple click away.

As for service and support, my experience was nothing short of fantastic. It should, however, be disclosed that the manufacturer was aware that I was performing this review. This fact may or may not have resulted in better than normal attention. Also, the combination of the training that is provided and how well the product performed meant there was little need for communication with support personnel.

Data Security / Privacy

9.2

The data security model in Smart Service is user based (as opposed to group). This means that each user's security settings will be managed individually. The user security options are not deep, but address the major areas of the application and in many cases provide restrictions for what can be added, edited or deleted.

My Service Depot's privacy policy is not something I could locate at a glance. However, it can be found by accessing the site map on their website. Once found, it is clear and concise.



Integration with QuickBooks

At the highest level, synchronization of data is real time where it should be, yet can still be controlled for more critical tasks that would impact the accounting such as converting work orders from Smart Service into QuickBooks invoices. I love the real time aspect of the interface and am greatly comforted by ability to control the sending of critical information based on an approval process approach.

At a more detailed level, the points where Smart Service touches QuickBooks are extremely thorough. This means that support for updated records and list elements are maintained throughout both systems.

9.5

The views expressed in this document do not represent the views of Intuit, etc.