



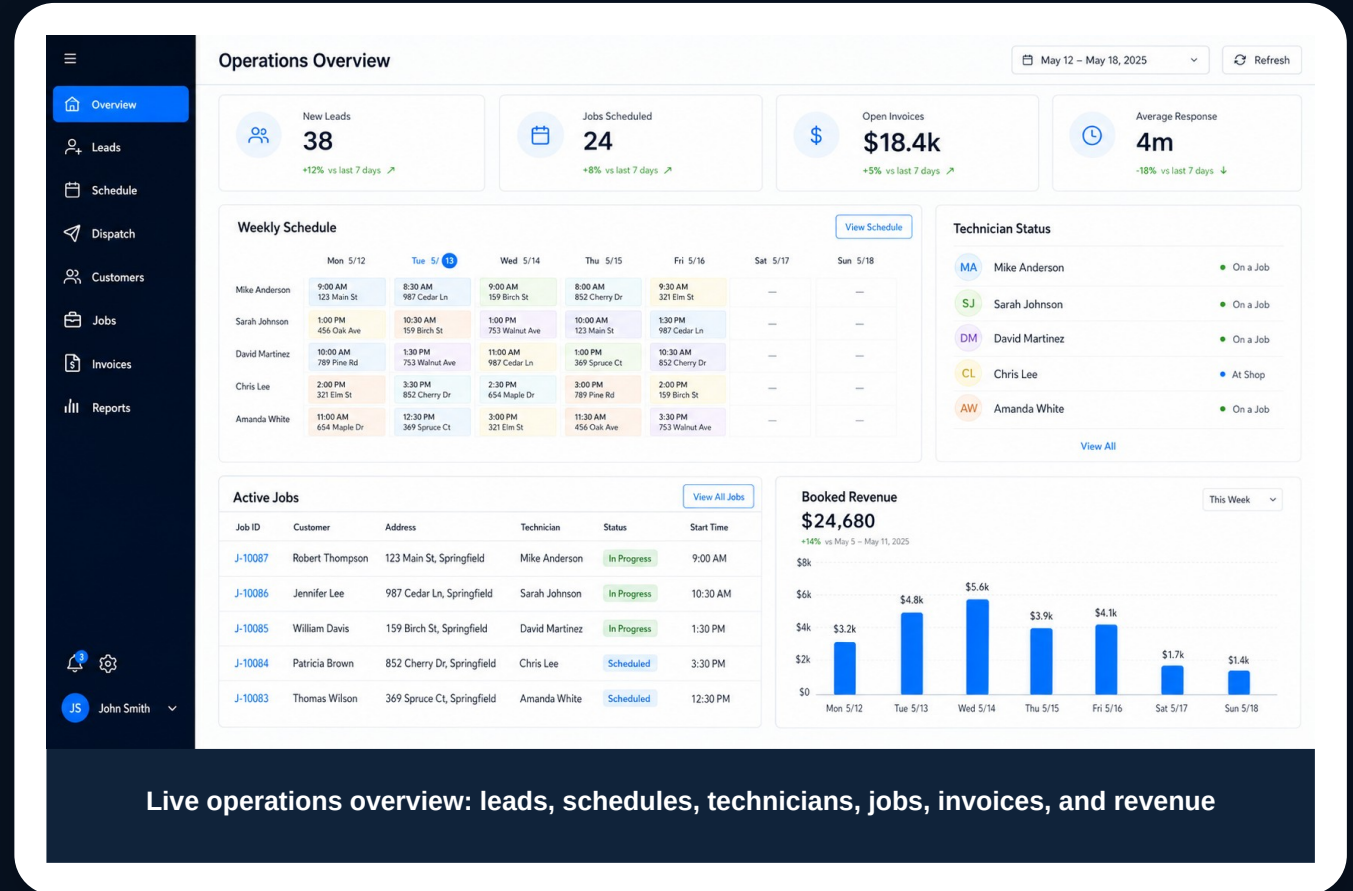
Operations Software

Built for Service Businesses

Connect leads, customers, jobs, field teams, payments, reviews, and repeat business in one practical operating system.

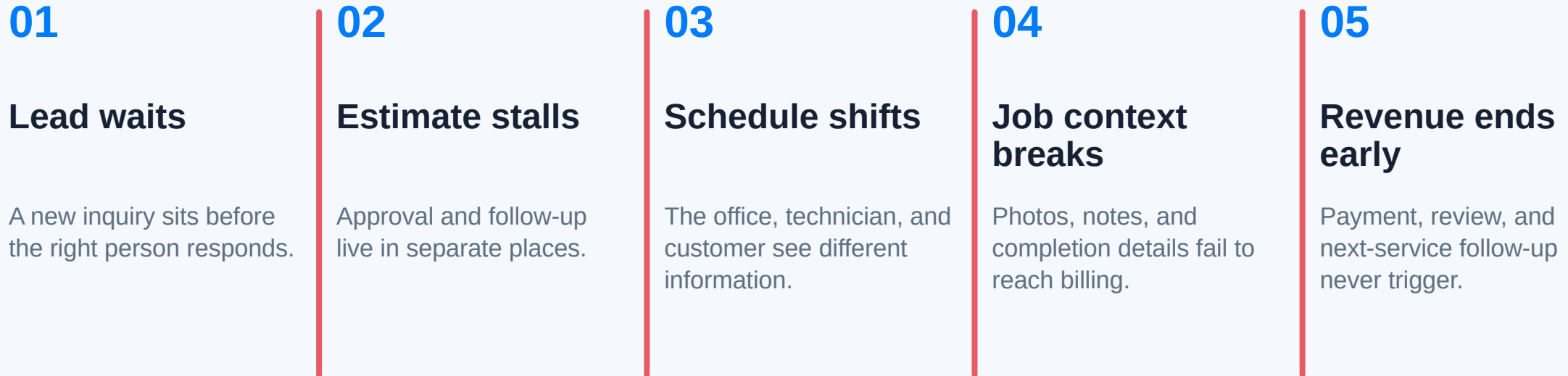
HVAC • PLUMBING • CONTRACTORS • FIELD SERVICES

(252) 999-2658 | ProSuiteSoftware.com



Growth leaks happen between handoffs.

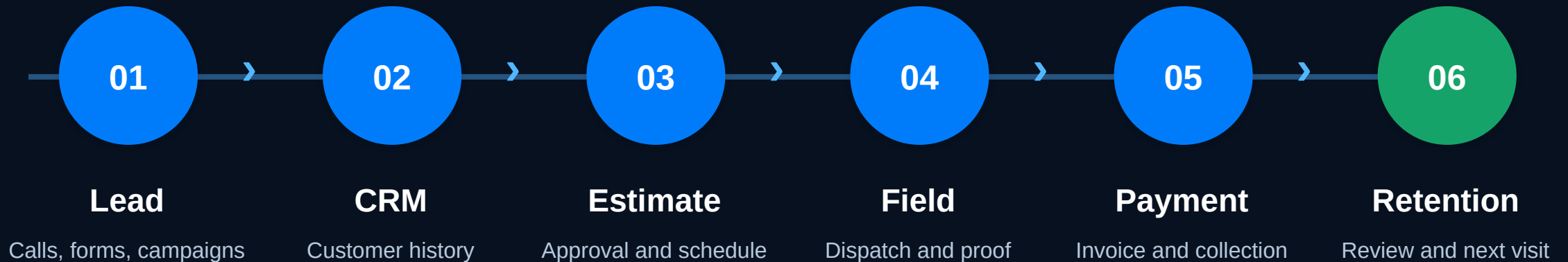
Every disconnected step creates delay, duplicate work, and lost customer context.



The issue is not effort. It is the missing connection between every stage of the customer and job lifecycle.

The customer and the work move forward together.

One record follows the opportunity from the first call through the next booked service.



More complete customer data • Faster response • Better job visibility • Stronger retention

One platform unifies the front office, field, and revenue cycle.

01

Front Office

- Lead intake and assignment
- CRM and communication
- Estimates and approvals
- Scheduling and reminders

02

Field Operations

- Dispatch and technician status
- Mobile job details
- Notes, photos, and checklists
- Proof of service

03

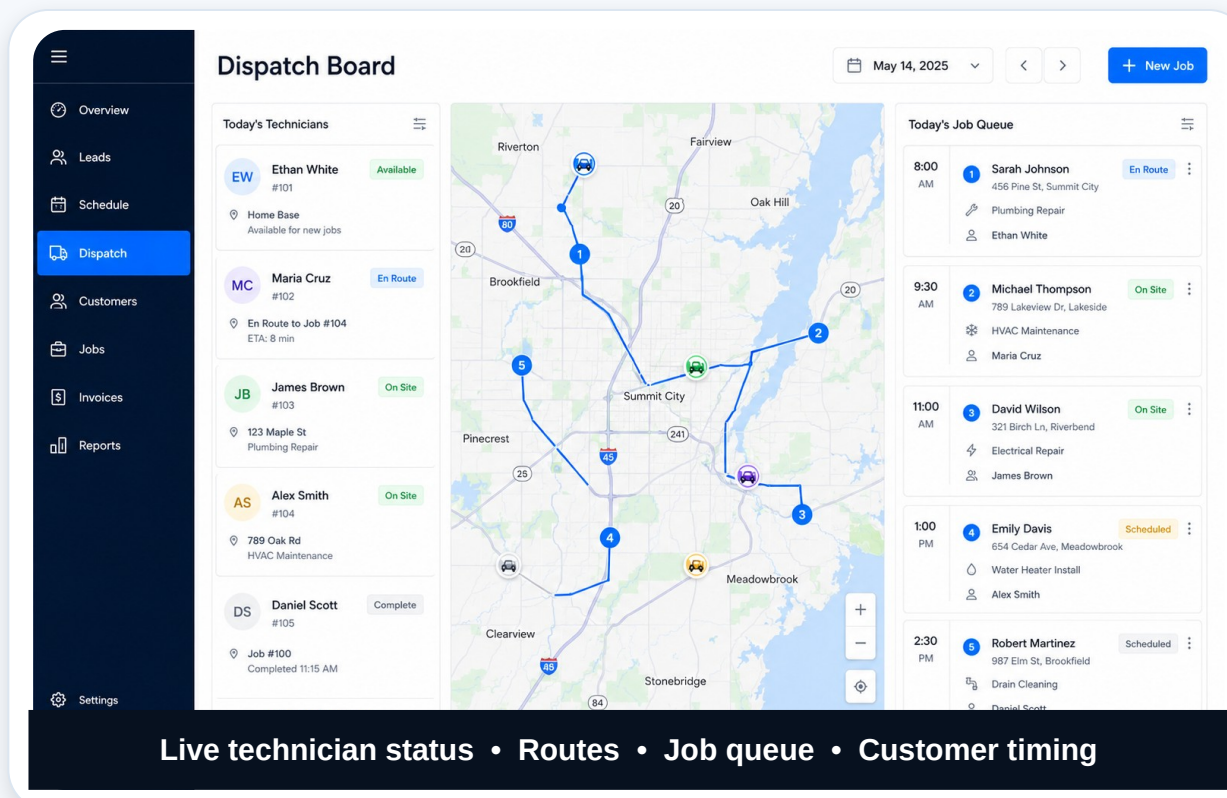
Revenue & Retention

- Invoices and payment requests
- Collection follow-up
- Reviews and reminders
- Reporting and repeat service

Office and field teams work from the same job context.

Every technician arrives with the information needed to do the work—and every office teammate sees what happened next.

- 1 Before arrival**
Customer history, property notes, equipment details, and approved scope.
- 2 During the job**
Status, checklists, photos, notes, parts, and customer communication.
- 3 After completion**
Proof of service, invoice trigger, payment request, review, and next action.



The screenshot displays the 'Dispatch Board' interface for May 14, 2025. It features a sidebar with navigation options: Overview, Leads, Schedule, Dispatch (highlighted), Customers, Jobs, Invoices, Reports, and Settings. The main content area is divided into three sections: 'Today's Technicians', a map, and 'Today's Job Queue'.

Today's Technicians:

- Ethan White (#101):** Available. Home Base. Available for new jobs.
- Maria Cruz (#102):** En Route. En Route to Job #104. ETA: 8 min.
- James Brown (#103):** On Site. 123 Maple St. Plumbing Repair.
- Alex Smith (#104):** On Site. 789 Oak Rd. HVAC Maintenance.
- Daniel Scott (#105):** Complete. Job #100. Completed 11:15 AM.

Today's Job Queue:

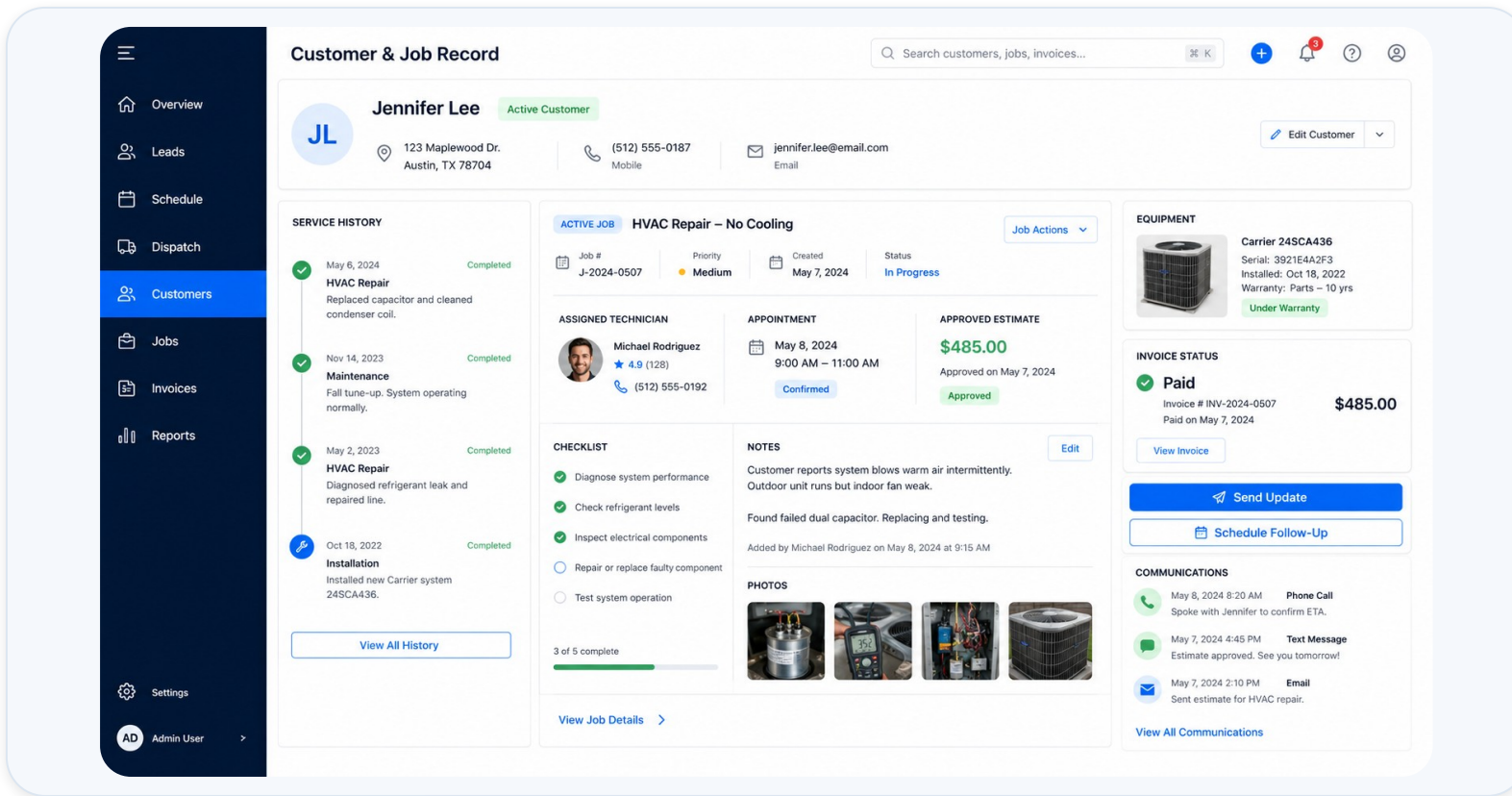
- 8:00 AM:** Sarah Johnson (456 Pine St, Summit City) - Plumbing Repair. En Route. Technician: Ethan White.
- 9:30 AM:** Michael Thompson (789 Lakeview Dr, Lakeside) - HVAC Maintenance. On Site. Technician: Maria Cruz.
- 11:00 AM:** David Wilson (321 Birch Ln, Riverbend) - Electrical Repair. On Site. Technician: James Brown.
- 1:00 PM:** Emily Davis (654 Cedar Ave, Meadowbrook) - Water Heater Install. Scheduled. Technician: Alex Smith.
- 2:30 PM:** Robert Martinez (987 Elm St, Brookfield) - Drain Cleaning. Scheduled. Technician: Daniel Scott.

The map shows the geographic distribution of these jobs and technicians across the area, with numbered markers corresponding to the job queue.

Live technician status • Routes • Job queue • Customer timing

Finished work should trigger the next revenue action.

Pro Suite connects completion, collection, reputation, and retention so value does not stop when the technician leaves.



Customer & Job Record

Jennifer Lee Active Customer

123 Maplewood Dr.
Austin, TX 78704

(512) 555-0187
Mobile

jennifer.lee@email.com
Email

SERVICE HISTORY

- May 6, 2024 Completed
HVAC Repair
Replaced capacitor and cleaned condenser coil.
- Nov 14, 2023 Completed
Maintenance
Fall tune-up. System operating normally.
- May 2, 2023 Completed
HVAC Repair
Diagnosed refrigerant leak and repaired line.
- Oct 18, 2022 Completed
Installation
Installed new Carrier system 24SCA436.

[View All History](#)

ACTIVE JOB **HVAC Repair – No Cooling** Job Actions

Job # J-2024-0507 | Priority Medium | Created May 7, 2024 | Status In Progress

ASSIGNED TECHNICIAN
Michael Rodriguez
★ 4.9 (128)
(512) 555-0192

APPOINTMENT
May 8, 2024
9:00 AM – 11:00 AM
Confirmed

APPROVED ESTIMATE
\$485.00
Approved on May 7, 2024
Approved

EQUIPMENT
Carrier 24SCA436
Serial: 3921E4A2F3
Installed: Oct 18, 2022
Warranty: Parts – 10 yrs
Under Warranty

INVOICE STATUS
Paid
Invoice # INV-2024-0507
Paid on May 7, 2024
\$485.00
[View Invoice](#)

[Send Update](#)
[Schedule Follow-Up](#)

CHECKLIST

- ☒ Diagnose system performance
- ☒ Check refrigerant levels
- ☒ Inspect electrical components
- ☐ Repair or replace faulty component
- ☐ Test system operation

3 of 5 complete

NOTES Edit

Customer reports system blows warm air intermittently. Outdoor unit runs but indoor fan weak.

Found failed dual capacitor. Replacing and testing.

Added by Michael Rodriguez on May 8, 2024 at 9:15 AM

PHOTOS

[View Job Details](#)

COMMUNICATIONS

- May 8, 2024 8:20 AM **Phone Call**
Spoke with Jennifer to confirm ETA.
- May 7, 2024 4:45 PM **Text Message**
Estimate approved. See you tomorrow!
- May 7, 2024 2:10 PM **Email**
Sent estimate for HVAC repair.

[View All Communications](#)

CONNECTED REVENUE ACTIONS

- 1 Complete**
Capture notes, photos, checklist progress, and proof of service.
- 2 Collect**
Create the invoice, show payment status, and follow up cleanly.
- 3 Reinforce**
Send the customer update and request the next best action.
- 4 Return**
Schedule follow-up, maintenance, and repeat service.

Management sees what the system is improving.

Each workflow is mapped to an operating result the business can monitor over time.

01 Faster response

Time from new inquiry to the right call, text, or follow-up.

02 More booked work

Lead source, estimate approval, schedule, and conversion visibility.

03 Cleaner collections

Time between job completion, invoice delivery, and payment.

04 More repeat revenue

Reviews, reminders, maintenance, and future-service activity.

Industry workflows fit the work your team actually performs.

Shared platform. Industry-specific setup.

HV

HVAC

- Equipment records
- Maintenance agreements
- Emergency dispatch
- Seasonal follow-up

PL

Plumbing

- Diagnostic notes
- Job routing
- Customer approvals
- Property history

CO

Contractors

- Project estimates
- Crew assignments
- Field documentation
- Progress billing

FS

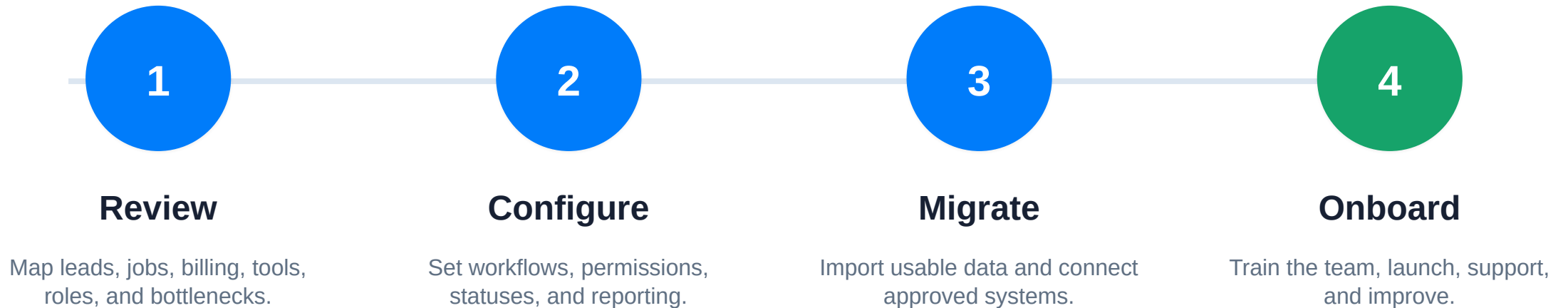
Field Services

- Repeat appointments
- Proof of service
- Customer updates
- Review requests

Configured around your job types, roles, statuses, checklists, customer communication, and reporting.

Move into one system without starting over.

Keep what works. Connect what should stay. Replace only what is creating friction.



QUICKBOOKS • BUSINESS PHONE • TEXT • EMAIL • PAYMENTS • SCHEDULING

Choose the platform that matches your stage of growth.

Operations Starter

CUSTOM

Setup + monthly software

For a smaller team replacing spreadsheets and disconnected office tools.

- ✓ **Customer and property records**
- ✓ Lead and job pipeline
- ✓ Estimates and invoices
- ✓ Scheduling and reminders

MOST POPULAR

Field Operations Suite

CUSTOM

Setup + monthly software

For a growing company connecting the office, technicians, customers, and revenue.

- ✓ **Everything in Operations Starter**
- ✓ Scheduling and dispatch
- ✓ Mobile field workflows
- ✓ Payments and reporting

Connected Business Platform

CUSTOM

Setup + monthly software

For an established operation that needs a complete system and ongoing optimization.

- ✓ **Complete lead-to-revenue platform**
- ✓ Data migration and onboarding
- ✓ Advanced integrations
- ✓ Continuous improvements



FREE OPERATIONAL GROWTH PLAN

Start with the biggest operational leak.

We will review your lead flow, customer follow-up, scheduling, field operation, invoicing, and repeat-business process—then identify what to improve first.

CALL OR TEXT (252) 999-2658

ProSuiteSoftware.com

Greenville, North Carolina • Serving businesses nationwide



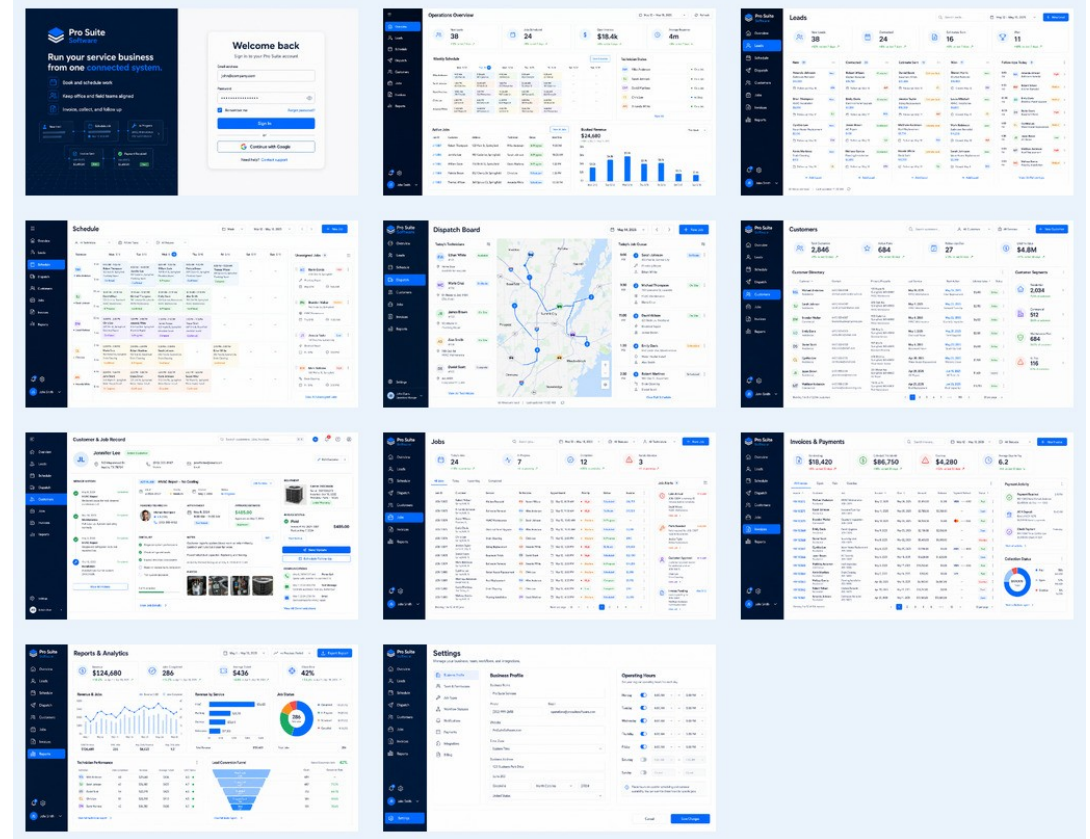


PRODUCT EXPERIENCE

One platform, designed around the work.

Explore the connected screens that support every stage—from first lead to repeat business.

LEADS • SCHEDULE • DISPATCH • CUSTOMERS • JOBS •
REVENUE





Run your service business
from one **connected system.**



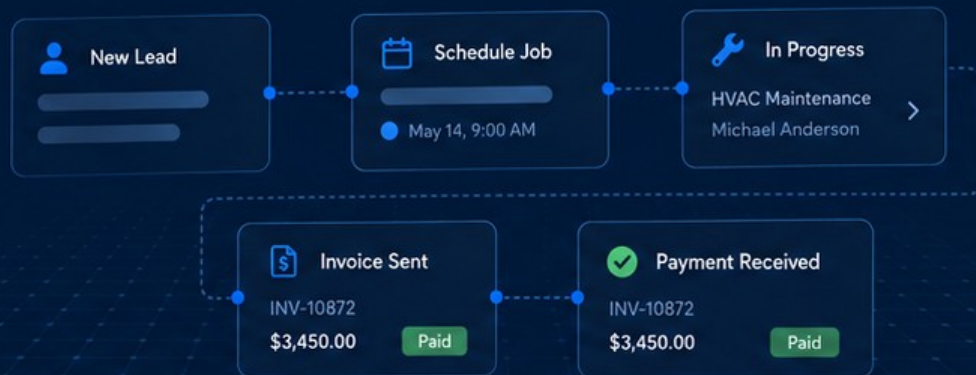
Book and schedule work



Keep office and field teams aligned



Invoice, collect, and follow up



Welcome back

Sign in to your Pro Suite account

Email address

john@company.com

Password

.....



Remember me

[Forgot password?](#)

Sign In

or



Continue with Google

Need help? [Contact support](#)

Operations Overview

New Leads
38
+12% vs last 7 days ↗

Jobs Scheduled
24
+8% vs last 7 days ↗

Open Invoices
\$18.4k
+5% vs last 7 days ↗

Average Response
4m
-18% vs last 7 days ↓

Weekly Schedule

[View Schedule](#)

	Mon 5/12	Tue 5/13	Wed 5/14	Thu 5/15	Fri 5/16	Sat 5/17	Sun 5/18
Mike Anderson	9:00 AM 123 Main St	8:30 AM 987 Cedar Ln	9:00 AM 159 Birch St	8:00 AM 852 Cherry Dr	9:30 AM 321 Elm St	—	—
Sarah Johnson	1:00 PM 456 Oak Ave	10:30 AM 159 Birch St	1:00 PM 753 Walnut Ave	10:00 AM 123 Main St	1:30 PM 987 Cedar Ln	—	—
David Martinez	10:00 AM 789 Pine Rd	1:30 PM 753 Walnut Ave	11:00 AM 987 Cedar Ln	1:00 PM 369 Spruce Ct	10:30 AM 852 Cherry Dr	—	—
Chris Lee	2:00 PM 321 Elm St	3:30 PM 852 Cherry Dr	2:30 PM 654 Maple Dr	3:00 PM 789 Pine Rd	2:00 PM 159 Birch St	—	—
Amanda White	11:00 AM 654 Maple Dr	12:30 PM 369 Spruce Ct	3:00 PM 321 Elm St	11:30 AM 456 Oak Ave	3:30 PM 753 Walnut Ave	—	—

Technician Status

MA

Mike Anderson

On a Job

SJ

Sarah Johnson

On a Job

DM

David Martinez

On a Job

CL

Chris Lee

At Shop

AW

Amanda White

On a Job

[View All](#)

Active Jobs

[View All Jobs](#)

Job ID	Customer	Address	Technician	Status	Start Time
J-10087	Robert Thompson	123 Main St, Springfield	Mike Anderson	In Progress	9:00 AM
J-10086	Jennifer Lee	987 Cedar Ln, Springfield	Sarah Johnson	In Progress	10:30 AM
J-10085	William Davis	159 Birch St, Springfield	David Martinez	In Progress	1:30 PM
J-10084	Patricia Brown	852 Cherry Dr, Springfield	Chris Lee	Scheduled	3:30 PM
J-10083	Thomas Wilson	369 Spruce Ct, Springfield	Amanda White	Scheduled	12:30 PM



Leads





May 12 – May 18, 2025

▼



New Lead



New Leads

38

+12% vs last 7 days ↗



Contacted

24

+8% vs last 7 days ↗



Estimates Sent

16

+6% vs last 7 days ↗



Won

11

+10% vs last 7 days ↗

New 38	...	Contacted 24	...	Estimate Sent 16	...	Won 11	...	Follow-Ups Today 8	...
Amanda Johnson Bathroom Remodel \$12,500 Follow up: May 16 MA		Robert Wilson Kitchen Remodel \$18,750 Follow up: May 16 AW		Daniel Scott Basement Finish \$22,000 Follow up: May 16 CL		Steven Harris Kitchen Remodel \$19,500 Closed: May 12 DM		9:00 AM MA Amanda Johnson Bathroom Remodel High >	
Brian Thompson HVAC Installation \$8,900 Follow up: May 17 SJ		Emily Davis Electrical Panel Upgrade \$3,200 Follow up: May 17 MA		Jessica Taylor Siding Replacement \$15,300 Follow up: May 17 AW		Laura Mitchell HVAC Installation \$9,600 Closed: May 11 CL		9:30 AM RW Robert Wilson Kitchen Remodel Medium >	
Cynthia Lee Water Heater Replacement \$2,100 Follow up: May 18 DM		Jason Brown AC Repair \$450 Follow up: May 18 SJ		Matthew Anderson Roof Replacement \$9,750 Follow up: May 18 MA		Mark Robinson Bathroom Remodel \$14,250 Closed: May 10 AW		10:30 AM ED Emily Davis Electrical Panel Upgrade Medium >	
Kevin Martinez Drain Cleaning \$350 Follow up: May 19 CL		Melissa Garcia Flooring Installation \$6,800 Follow up: May 19 DM		Nicole White Deck Build \$11,200 Follow up: May 19 SJ		Sarah Johnson Water Heater Replacement \$2,300 Closed: May 9 MA		11:00 AM DS Daniel Scott Basement Finish High >	
+ Add Lead		+ Add Lead		+ Add Lead		+ Add Lead		View All Follow-Ups	



JS

[View All Unassigned Jobs](#)

Dispatch Board

May 14, 2025



+ New Job

Today's Technicians

EW

Ethan White
#101

Available

📍

Home Base
Available for new jobs

MC

Maria Cruz
#102

En Route

📍

En Route to Job #104
ETA: 8 min

JB

James Brown
#103

On Site

📍

123 Maple St
Plumbing Repair

AS

Alex Smith
#104

On Site

📍

789 Oak Rd
HVAC Maintenance

DS

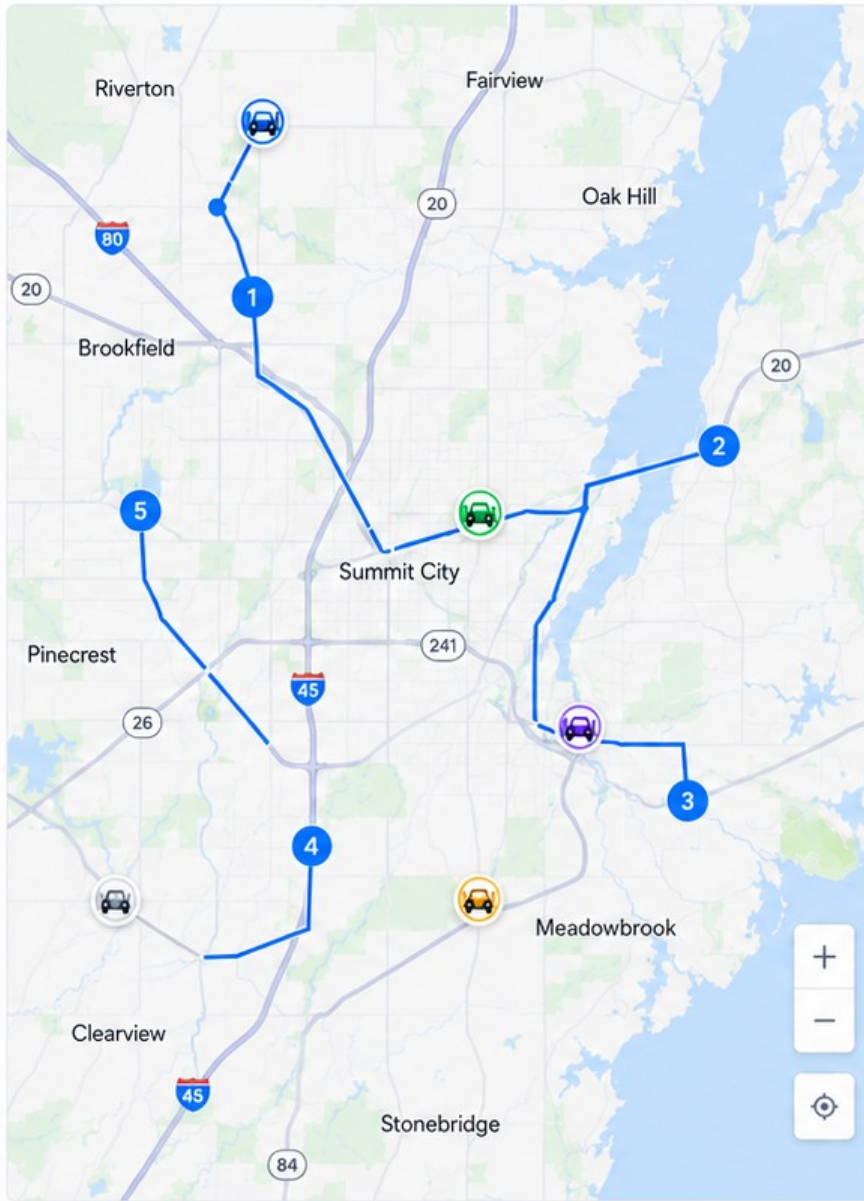
Daniel Scott
#105

Complete

📍

Job #100
Completed 11:15 AM

[View All Technicians](#)



All times are local | Last updated: 11:32 AM

Today's Job Queue

8:00 AM

1

Sarah Johnson
456 Pine St, Summit City

Plumbing Repair

Ethan White

En Route

9:30 AM

2

Michael Thompson
789 Lakeview Dr, Lakeside

HVAC Maintenance

Maria Cruz

On Site

11:00 AM

3

David Wilson
321 Birch Ln, Riverbend

Electrical Repair

James Brown

On Site

1:00 PM

4

Emily Davis
654 Cedar Ave, Meadowbrook

Water Heater Install

Alex Smith

Scheduled

2:30 PM

5

Robert Martinez
987 Elm St, Brookfield

Drain Cleaning

Daniel Scott

Scheduled

[View Full Schedule](#)

Customers



Search customers...



All Customers





All Services



+

New Customer



Total Customers

2,846

+9% vs last 30 days 



Active Plans

684

+7% vs last 30 days 



Follow-Ups Due

27

+12% vs last 30 days 



Lifetime Value

\$4.8M

+11% vs last 30 days 

Customer Directory

Customer ^	Contact	Primary Property	Last Service	Next Action	Lifetime Value ^	Status	
MA Michael Anderson Residential	(417) 555-0198 micheal.anderson@email.com	123 Maple St Springfield, MO 65802 HVAC Maintenance	May 10, 2025 HVAC Maintenance	May 24, 2025 Filter Replacement	\$3,450	Active	
SJ Sarah Johnson Residential	(417) 555-0142 sarah.johnson@email.com	456 Oak Ave Springfield, MO 65803 HVAC Maintenance	May 9, 2025 HVAC Maintenance	May 23, 2025 Seasonal Tune-Up	\$2,780	Active	
BW Brandon Walker Commercial	(417) 555-0187 bwalker@walkerproperties.com	963 Cedar Ln Springfield, MO 65802 HVAC Maintenance	May 8, 2025 HVAC Maintenance	May 22, 2025 Quarterly Inspection	\$6,920	Active	
ED Emily Davis Residential	(417) 555-0165 emily.davis@email.com	789 Pine Dr Springfield, MO 65804 Electrical Service	May 7, 2025 Electrical Repair	May 21, 2025 Panel Upgrade	\$2,150	Active	
DS Daniel Scott Residential	(417) 555-0133 dan.scott@email.com	987 Elm St Springfield, MO 65803 Basement Finishing	May 6, 2025 Basement Finish	May 20, 2025 Touch-Up Visit	\$5,600	Active	
CL Cynthia Lee Residential	(417) 555-0172 cynthia.lee@email.com	654 Birch Ln Springfield, MO 65802 Water Heater Service	Apr 30, 2025 Water Heater Replacement	May 28, 2025 Warranty Check	\$1,980	Active	
JB Jason Brown Residential	(417) 555-0119 jason.brown@email.com	321 Walnut Ave Springfield, MO 65802 AC Repair	Apr 29, 2025 AC Repair	Jun 15, 2025 AC Tune-Up	\$1,620	Inactive	
MT Matthew Anderson Commercial	(417) 555-0128 matthew@andersonbldg.com	159 Brick St Springfield, MO 65803 Roof Replacement	Apr 25, 2025 Roof Replacement	Jun 25, 2025 Roof Inspection	\$15,750	Active	

Showing 1 to 8 of 2,846 customers

<

1

2

3

4

5

...

356

>

20 per page 

Customer Segments



Residential

2,034

71.5% of customers



Commercial

512

18.0% of customers



Maintenance Plan

684

24.0% of customers



At Risk

116

4.1% of customers



JS

Jobs

May 12 – May 18, 2025

All Statuses

All Technicians

+ New Job



Today's Jobs

24

+14% vs yesterday ↗



In Progress

7

+2 vs yesterday ↗



Completed

12

+20% vs yesterday ↗



Needs Attention

3

+1 vs yesterday ↗

All Jobs

Today

Upcoming

Completed

Job ID	Customer	Service	Technician	Appointment	Priority	Status	Invoice	
JOB-10872	Robert Wilson Springfield, IL	Kitchen Remodel	RW Robert Wilson	May 12, 8:00 AM	High	Scheduled	\$18,750	
JOB-10873	Amanda Johnson Springfield, IL	Bathroom Remodel	MA Mike Anderson	May 12, 9:00 AM	High	En Route	\$12,500	
JOB-10874	David Wilson Riverton, IL	HVAC Maintenance	SJ Sarah Johnson	May 12, 10:00 AM	Medium	In Progress	—	
JOB-10875	Emily Davis Springfield, IL	Electrical Panel Upgrade	MA Mike Anderson	May 12, 10:30 AM	Medium	Scheduled	\$3,200	
JOB-10876	Chris Lee Springfield, IL	Drain Cleaning	CL Chris Lee	May 12, 2:00 PM	Medium	In Progress	\$350	
JOB-10877	Jessica Taylor Summit City, IL	Siding Replacement	AW Amanda White	May 12, 1:30 PM	High	En Route	\$15,300	
JOB-10878	Daniel Scott Springfield, IL	Basement Finish	DS Daniel Scott	May 12, 1:00 PM	High	Scheduled	\$22,000	
JOB-10879	Mark Robinson Springfield, IL	Bathroom Remodel	AW Amanda White	May 12, 2:30 PM	Medium	In Progress	\$14,250	
JOB-10880	Cynthia Lee Springfield, IL	Water Heater Replacement	CL Chris Lee	May 12, 3:00 PM	Medium	Scheduled	\$2,100	
JOB-10881	Matthew Anderson Brookfield, IL	Roof Replacement	MA Mike Anderson	May 12, 3:30 PM	High	Complete	\$9,750	
JOB-10882	Kevin Martinez Hot Siding, IL	Drain Cleaning	CL Chris Lee	May 12, 4:00 PM	Low	Complete	\$350	
JOB-10883	Melissa Garcia Springfield, IL	Flooring Installation	DM David Martinez	May 12, 4:30 PM	Medium	Scheduled	\$6,800	

Showing 1 to 12 of 48 jobs

Rows per page

12



1

2

3

4



Job Alerts 4



Late Arrival

9:15 AM

JOB-10874 is running 45 minutes behind schedule.

David Wilson
HVAC Maintenance

[View Job >](#)

Parts Needed

8:42 AM

Parts required for JOB-10877 need to be ordered.

Jessica Taylor
Siding Replacement

[View Job >](#)

Customer Approval

8:15 AM

Customer approval needed for additional work on JOB-10876.

Chris Lee
Drain Cleaning

[View Job >](#)

Invoice Pending

Mon 5/12

Invoice pending for JOB-10881.

Matthew Anderson
Roof Replacement

[View Job >](#)

Invoices & Payments

Search invoices...

May 12 – May 18, 2025

All Statuses

+ New Invoice



Outstanding

\$18,420

+8% vs last 30 days ↗



Collected This Month

\$86,750

+18% vs last 30 days ↗



Overdue

\$4,280

+12% vs last 30 days ↗



Average Days to Pay

6.2

-0.6 vs last 30 days ↘

All Invoices Open Paid Overdue

Invoice ^	Customer	Job	Issued ^	Due ^	Amount	Balance	Payment Method	Status ^	
INV-10872	Michael Anderson Residential	HVAC Maintenance JOB-10874	May 12, 2025	May 26, 2025	\$3,450.00	\$0.00	VISA **** 4242	Paid	
INV-10871	Sarah Johnson Residential	Seasonal Tune-Up JOB-10873	May 11, 2025	May 25, 2025	\$2,780.00	\$2,780.00	—	Open	
INV-10870	Brandon Walker Commercial	Quarterly Inspection JOB-10875	May 10, 2025	May 24, 2025	\$6,920.00	\$0.00	MARSH **** 5555	Paid	
INV-10869	Emily Davis Residential	Panel Upgrade JOB-10876	May 9, 2025	May 23, 2025	\$2,150.00	\$2,150.00	—	Open	
INV-10868	Daniel Scott Residential	Touch-Up Visit JOB-10878	May 8, 2025	May 22, 2025	\$5,600.00	\$5,600.00	—	Overdue	
INV-10867	Cynthia Lee Residential	Water Heater Replacement JOB-10880	May 6, 2025	May 20, 2025	\$1,980.00	\$0.00	AMEX **** 1005	Paid	
INV-10866	Jason Brown Residential	AC Tune-Up JOB-10881	May 4, 2025	May 18, 2025	\$1,620.00	\$1,620.00	—	Open	
INV-10865	Matthew Anderson Commercial	Roof Inspection JOB-10882	May 3, 2025	May 17, 2025	\$15,750.00	\$0.00	VISA **** 4242	Paid	
INV-10864	Kevin Martinez Residential	Drain Cleaning JOB-10883	May 2, 2025	May 16, 2025	\$350.00	\$0.00	ACH	Paid	
INV-10863	Melissa Garcia Residential	Flooring Installation JOB-10884	Apr 30, 2025	May 14, 2025	\$6,800.00	\$6,800.00	—	Overdue	
INV-10862	Robert Wilson Residential	Kitchen Remodel JOB-10872	Apr 28, 2025	May 12, 2025	\$18,750.00	\$0.00	—	Draft	
INV-10861	Amanda Johnson Residential	Bathroom Remodel JOB-10873	Apr 27, 2025	May 11, 2025	\$12,500.00	\$12,500.00	—	Open	

Showing 1 to 12 of 156 invoices

< 1 2 3 4 5 ... 13 >

12 per page

Payment Activity

- 

Payment Received

2:15 PM

INV-10872 from Michael Anderson
\$3,450.00 via Visa **** 4242
- 

ACH Deposit

11:42 AM

Batch #ACH-5278
\$8,920.00 from 5 payments
- 

Check Payment

Yesterday

INV-10867 from Cynthia Lee
\$1,980.00 Check #1024

View all activity >

Collection Status



View collection report >

JS

John Smith

Reports & Analytics

Revenue

\$124,680

+18.6% vs Apr 1 – Apr 30, 2025

Jobs Completed

286

+15.2% vs Apr 1 – Apr 30, 2025

Average Ticket

\$436

+4.8% vs Apr 1 – Apr 30, 2025

Close Rate

42%

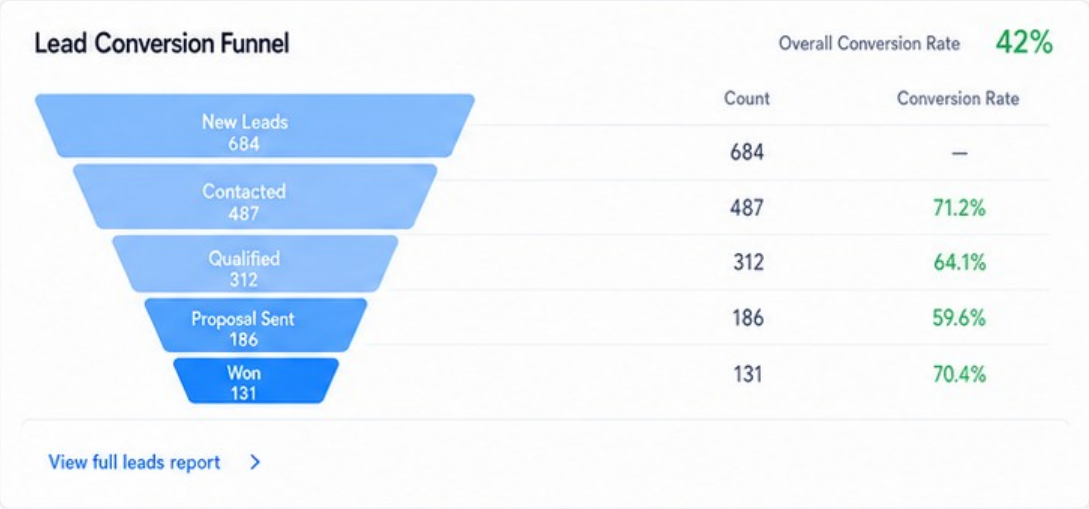
+3.6 pts vs Apr 1 – Apr 30, 2025



Technician Performance

Technician	Jobs Completed	Revenue	Average Ticket	CSAT Score
MA Mike Anderson	68	\$29,640	\$436	4.8 ★
SJ Sarah Johnson	62	\$26,180	\$422	4.7 ★
DS Daniel Scott	54	\$22,870	\$423	4.6 ★
CL Chris Lee	51	\$20,910	\$410	4.5 ★
DM David Martinez	42	\$18,250	\$435	4.7 ★

View full technician report >



Settings

Manage your business, team, workflows, and integrations.

 Business Profile

 Team & Permissions

 Job Types

 Workflow Statuses

 Notifications

 Payments

 Integrations

 Billing

Business Profile

Business Name

Pro Suite Services

Phone

(252) 999-2658

Email

operations@prosuitesoftware.com

Website

ProSuiteSoftware.com

Time Zone

Eastern Time ▾

Business Address

123 Business Park Drive

Suite 200

Greenville

North Carolina ▾

27834

United States ▾

Operating Hours

Set your regular operating hours for each day.

Monday



8:00 AM ▾



5:00 PM ▾

Tuesday



8:00 AM ▾



5:00 PM ▾

Wednesday



8:00 AM ▾



5:00 PM ▾

Thursday



8:00 AM ▾



5:00 PM ▾

Friday



8:00 AM ▾



5:00 PM ▾

Saturday



9:00 AM ▾



1:00 PM ▾

Sunday



Closed



Closed



These hours are used for scheduling and customer availability. You can override these hours for specific jobs.

Cancel

Save Changes

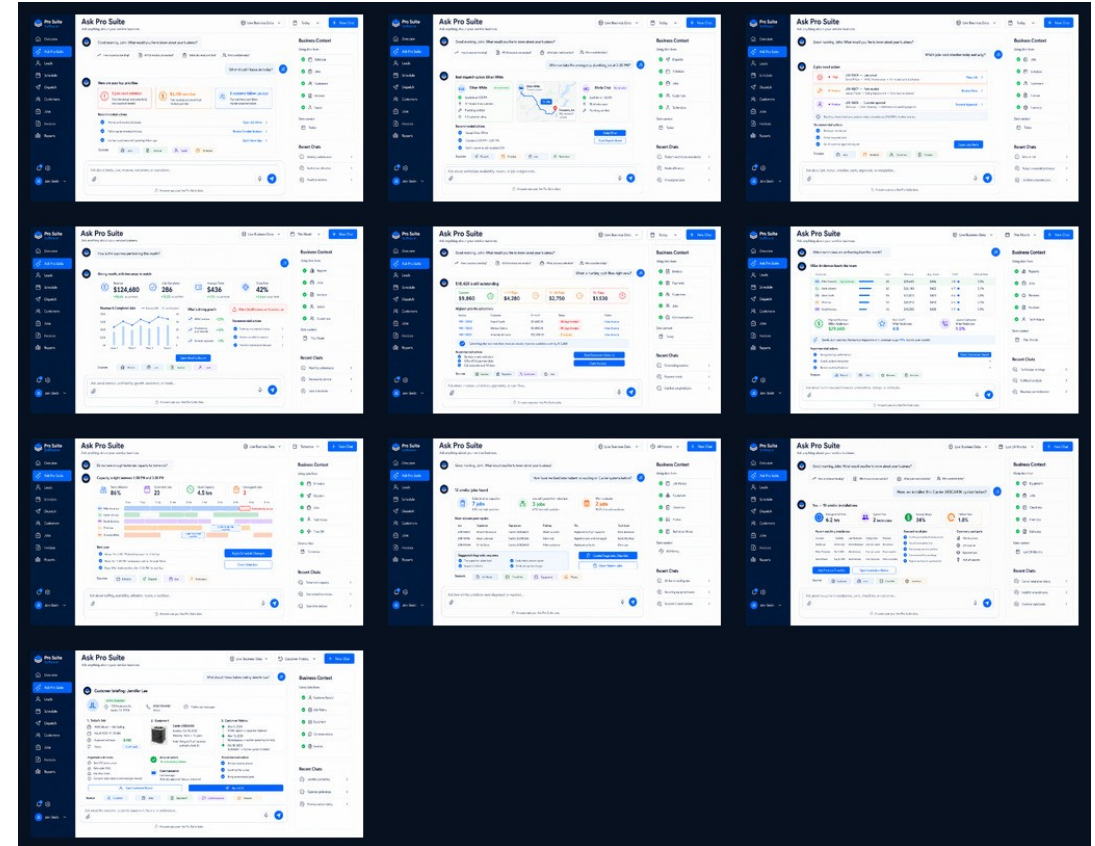


ASK PRO SUITE

Ask the system, then act.

Turn live business data and service history into clear answers, recommended actions, and faster decisions.

BUSINESS • TECHNICIANS • JOBS • CUSTOMERS • HISTORY





Ask Pro Suite

Ask anything about your service business.



Live Business Data



Today



New Chat



Good morning, John. What would you like to know about your business?



How is revenue trending?



Which invoices are overdue?



What jobs need attention?



Who is available today?

What should I focus on today?

JS



Here are your top priorities



3 jobs need attention

One late arrival, one parts hold,
one approval needed

\$4,280 overdue

Two invoices are more than
14 days past due

8 customer follow-ups due

Five estimates and three
maintenance reminders

Recommended actions



Review and resolve job issues

Open Job Alerts >



Follow up on overdue invoices

Review Overdue Invoices >



Contact customers with pending follow-ups

Start Follow-Ups >

Sources



Jobs



Invoices



Leads



Schedule

Ask about leads, jobs, revenue, customers, or operations...



Answers use your live Pro Suite data.

Business Context

Using data from



Schedule



Jobs



Customers



Invoices



Leads

Date context



Today

Recent Chats



Weekly performance >



Technician utilization >



Overdue invoices >



Ask Pro Suite

Ask anything about your service business.



Live Business Data



Today



New Chat



Good morning, John. What would you like to know about your business?



How is revenue trending?



Which invoices are overdue?



What jobs need attention?



Who is available today?

Who can take the emergency plumbing job at 2:00 PM?

JS



Best dispatch option: Ethan White

EW

Ethan White

Recommended



Available at 1:35 PM



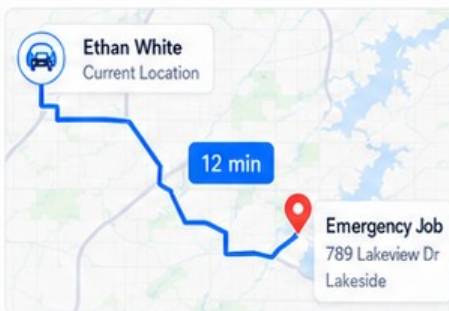
12 minutes from customer



Plumbing certified



4.8 customer rating



MC

Maria Cruz

Backup option



Available at 1:50 PM



18 minutes away



Plumbing certified

Recommended actions



Assign Ethan White



Schedule 2:00 PM – 3:30 PM



Notify customer with updated ETA

Assign Ethan

Open Dispatch Board

Sources



Dispatch



Schedule



Jobs



Technicians

Ask about technician availability, routes, or job assignments...



Answers use your live Pro Suite data.

Business Context

Using data from



Dispatch



Schedule



Jobs



Customers



Technicians

Date context



Today

Recent Chats



Today's technician availability



Route efficiency



Unassigned jobs





Ask Pro Suite

Ask anything about your service business.



Live Business Data



Today



New Chat



Good morning, John. What would you like to know about your business?

Which jobs need attention today and why?

JS



3 jobs need action



High

JOB-10874 — Late arrival

David Wilson • HVAC Maintenance • 45 minutes behind schedule

[View Job](#)

Medium

JOB-10877 — Parts needed

Jessica Taylor • Siding Replacement • Parts must be ordered

[Review Parts](#)

Medium

JOB-10876 — Customer approval

Chris Lee • Drain Cleaning • Additional work awaiting approval

[Request Approval](#)

Resolving these three items protects today's schedule and \$18,950 in booked revenue.

Recommended actions



Reassign the late job



Order required parts



Send customer approval request

[Open Job Alerts](#)

Sources



Jobs



Schedule



Customers



Invoices

Ask about job status, priorities, parts, approvals, or completion...



Answers use your live Pro Suite data.

Business Context

Using data from



Jobs



Schedule



Customers



Invoices



Inventory

Date context



Today

Recent Chats



Jobs at risk



Today's completion forecast



Unbilled completed jobs



Ask Pro Suite

Ask anything about your service business.

Live Business Data

This Month

+ New Chat



How is the business performing this month?

JS



Strong month, with two areas to watch



Revenue

\$124,680

+18.6% vs Last Month



Jobs Completed

286

+15.2% vs Last Month



Average Ticket

\$436

+4.8% vs Last Month



Close Rate

42%

+3.6 pts vs Last Month

Revenue & Completed Jobs



What is driving growth

- HVAC revenue +22%
- Maintenance plan renewals +16%
- Estimate approvals +9%

Watch: \$4,280 overdue and 18 cancelled jobs

Recommended actions

- Follow up on overdue invoices
- Review cancellation reasons
- Promote maintenance renewals

Open Monthly Report

Sources



Reports



Jobs



Invoices



Leads

Ask about revenue, profitability, growth, customers, or trends...



Answers use your live Pro Suite data.

Business Context

Using data from

✓ Reports

✓ Jobs

✓ Invoices

✓ Leads

✓ Customers

Date context

This Month

Recent Chats

Monthly performance >

Revenue by service >

Lead conversion >

Ask Pro Suite

Ask anything about your service business.

Live Business Data

Today

+ New Chat



Good morning, John. What would you like to know about your business?

How is revenue trending?

Which invoices are overdue?

What jobs need attention?

Who is available today?

What is hurting cash flow right now?

JS



\$18,420 is still outstanding

Current

\$9,860



1-14 Days

\$4,280



15-30 Days

\$2,750



31+ Days

\$1,530



Highest-priority collections

Invoice	Customer	Amount	Status	Action
INV-10868	Daniel Scott	\$5,600.00	18 days overdue	View Invoice
INV-10863	Melissa Garcia	\$6,800.00	20 days overdue	View Invoice
INV-10861	Amanda Johnson	\$12,500.00	Due today	View Invoice



Collecting the two overdue invoices would improve available cash by \$12,400.

Recommended actions

- ✓ Send payment reminders
- ✓ Offer ACH payment links
- ✓ Call accounts over 14 days

Start Collection Follow-Up

Open Invoices

Sources

Invoices

Payments

Customers

Jobs

Ask about invoices, collections, payments, or cash flow...



Answers use your live Pro Suite data.

Business Context

Using data from

✓ Invoices

✓ Payments

✓ Customers

✓ Jobs

✓ Communications

Date context

Today

Recent Chats

Outstanding invoices >

Payment trends >

Unbilled completed jobs >

Ask Pro Suite

Ask anything about your service business.

Live Business Data

This Month

+ New Chat



Which technicians are performing best this month?

JS



Mike Anderson leads the team

Technician	Jobs	Revenue	Avg. Ticket	CSAT	Callback Rate
MA Mike Anderson Top Performer	68	\$29,640	\$436	4.8 ★	1.5%
SJ Sarah Johnson	62	\$26,180	\$422	4.7 ★	2.1%
DS Daniel Scott	54	\$22,870	\$423	4.6 ★	2.8%
CL Chris Lee	51	\$20,910	\$410	4.5 ★	3.1%
DM David Martinez	42	\$18,250	\$435	4.7 ★	1.9%

Highest Revenue:
Mike Anderson
\$29,640Best CSAT:
Mike Anderson
4.8Lowest Callbacks:
Mike Anderson
1.5%

Sarah Johnson has the fastest improvement: revenue is up 14% month over month.

Recommended actions

- Recognize top performance
- Coach callback reduction
- Review workload balance

Open Technician Report

Sources



Reports



Jobs



Reviews



Invoices

Ask about technician performance, productivity, ratings, or callbacks...



Answers use your live Pro Suite data.

Business Context

Using data from



Reports



Jobs



Reviews



Invoices



Technicians

Date context



This Month

Recent Chats



Technician rankings



Callback analysis



Revenue per technician





Ask Pro Suite

Ask anything about your service business.



Live Business Data



Tomorrow



New Chat



Do we have enough technician capacity for tomorrow?



Capacity is tight between 1:00 PM and 3:30 PM



Team Utilization

86%



Scheduled Jobs

23



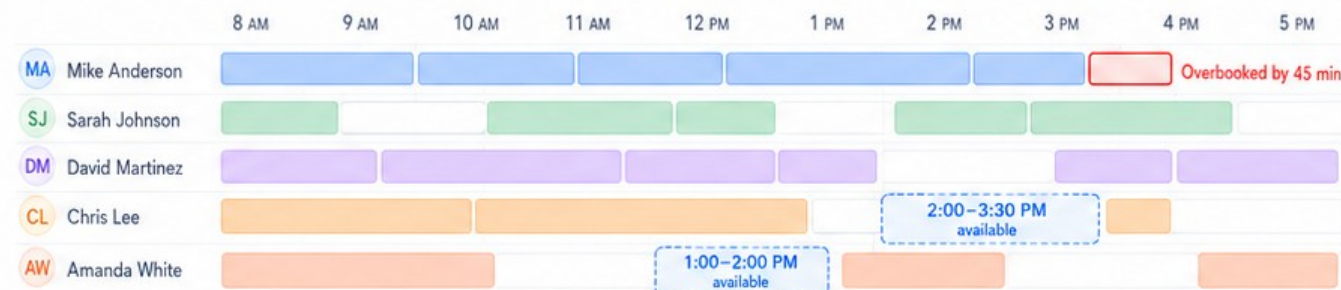
Open Capacity

4.5 hrs



Unassigned Jobs

3



Best plan

- Assign the 2:00 PM plumbing repair to Chris Lee
- Move the 1:30 PM maintenance visit to Amanda White
- Keep Mike Anderson free after 4:00 PM for overflow

Apply Schedule Changes

Open Schedule

Sources



Schedule



Dispatch



Jobs



Technicians

Ask about staffing, availability, utilization, routes, or workload...



Answers use your live Pro Suite data.

Business Context

Using data from



Schedule



Dispatch



Jobs



Technicians



Time Off

Date context



Tomorrow

Recent Chats



Tomorrow's capacity



Overbooked technicians



Open time windows





Ask Pro Suite

Ask anything about your service business.



Live Business Data



All History



New Chat



Good morning, John. What would you like to know about your business?



12 similar jobs found



Failed dual-run capacitor

7 jobs

83% first-visit resolution



Low refrigerant from valve leak

3 jobs

67% first-visit resolution



Worn contactor

2 jobs

100% first-visit resolution

Most relevant past repairs

Job	Customer	Equipment	Finding	Fix	Technician
JOB-10482	Robert Thompson	Carrier 24SCA436	Weak capacitor	Replaced 45/5 µF capacitor	Mike Anderson
JOB-10196	Sarah Johnson	Carrier 24ABC636	Valve leak	Repaired valve and recharged	David Martinez
JOB-09844	Emily Davis	Carrier 24SCA430	Pitted contactor	Replaced contactor	Chris Lee

Suggested diagnostic sequence

- ✓ Test capacitor under load
- ✓ Inspect contactor
- ✓ Leak-check service valves
- ✓ Verify refrigerant charge



Create Diagnostic Checklist



Open Similar Jobs

Sources



Job Notes



Checklists



Equipment



Photos

Ask how similar problems were diagnosed or repaired...



Answers use your live Pro Suite data.

Business Context

Using data from



Job History



Equipment



Checklists



Photos



Technician Notes

Date context



All History

Recent Chats



Similar no-cooling jobs



Recurring equipment issues



Successful repair patterns



Ask Pro Suite

Ask anything about your service business.

Live Business Data

Last 24 Months

+ New Chat



Good morning, John. What would you like to know about your business?

How is revenue trending?

Which invoices are overdue?

What jobs need attention?

Who is available today?

Have we installed this Carrier 24SCA436 system before?

JS



Yes — 18 similar installations



Average Install Time

6.2 hrs



Typical Crew

2 technicians



Average Margin

34%



Callback Rate

1.8%

Recent matching installations

Customer	Installed	Lead Technician	Configuration	Outcome
Jennifer Lee	Oct 18, 2022	Michael Rodriguez	3-ton split system	No callbacks
Robert Thompson	Mar 7, 2024	Mike Anderson	3-ton split system	Passed inspection
Sarah Johnson	Aug 12, 2024	David Martinez	3-ton heat pump	Follow-up complete

Use Previous Checklist

Open Installation History

Standard install plan

- 1 Confirm pad and electrical disconnect
- 2 Set and level outdoor unit
- 3 Pressure-test and evacuate lines
- 4 Commission airflow and charge
- 5 Register warranty and capture photos

Commonly used parts

- 30A disconnect
- 3/4 in line set
- Equipment pad
- 45/5 µF capacitor

Sources

Equipment

Jobs

Checklists

Inventory

Ask about equipment installations, parts, checklists, or outcomes...



Answers use your live Pro Suite data.

Business Context

Using data from

Equipment

Jobs

Checklists

Inventory

Estimates

Date context

Last 24 Months

Recent Chats

Carrier installation history

Install time benchmarks

Common install parts

Ask Pro Suite

Ask anything about your service business.

Live Business Data

Customer History

+ New Chat

What should I know before visiting Jennifer Lee?

JS



Customer briefing: Jennifer Lee



Active Customer

123 Maplewood Dr.,
Austin, TX 78704(512) 555-0187
Mobile

Prefers text messages

1. Today's Job

HVAC Repair — No Cooling

May 8, 9:00–11:00 AM

Approved estimate **\$485**Status **Confirmed**

2. Equipment



Carrier 24SCA436

Installed: Oct 18, 2022

Warranty: Parts — 10 years

Note: Bring 45/5 µF capacitor
and leak-check kit

3. Customer History

- May 6, 2024
HVAC repair — capacitor replaced
- Nov 14, 2023
Maintenance — system operating normally
- Oct 18, 2022
Installation — Carrier system installed

Important visit notes

- Text ETA before arrival
- Gate code 1842
- Use shoe covers
- Customer asked about maintenance plan renewal



Account current

No outstanding balance



Communication

Last message:
Estimate approved. See you tomorrow!

Recommended actions

- Review previous photos
- Confirm ETA by text
- Bring recommended parts



Open Customer Record



Send ETA

Sources



Customer



Jobs



Equipment



Communications



Invoices

Ask about this customer, property, equipment, history, or preferences...



Answers use your live Pro Suite data.

Business Context

Using data from



Customer Record



Job History



Equipment



Communications



Invoices

Recent Chats



Jennifer Lee briefing



Customer preferences



Previous service history

