Project Details – CRM with Dispatch Mobile Application

Project Overview

We are developing a CRM with Dispatch mobile application designed for onsite employees such as technicians and installers. The goal is to improve field service management by providing real-time tracking, efficient scheduling, and seamless communication between back-office staff and field workers.

The application will serve as a mobile extension of the CRM and Dispatch system, enabling field employees to manage their workday, update job status, and process payments directly from their devices.

Key Features

1. Employee Management

- Clock In / Clock Out – Track employee working hours and attendance.
- Start Job / End Job – Mark job assignments as in progress or completed.
- Schedules – View assigned jobs, tasks, and upcoming schedules.

2. Real-Time Operations

- Live GPS Tracking – Monitor technician/installer location in real time for better dispatch coordination.
- Job Progress Updates – Automatic sync of job status and field activities with the central CRM.

3. Payments & Transactions

- Stripe Integration – Accept secure online payments.
- Credit Card Processing – Handle card payments onsite with encryption and compliance.
- Receipts & Reports – Auto-generate payment confirmations and reports for office records.

4. Customer Engagement

- Customer Notes – Add or update job-related notes while onsite.
- Job History – View past services, payments, and customer feedback.

5. Reporting & Analytics

- Work Reports – Employees can submit job completion reports.
- Performance Tracking – Office staff can generate productivity and efficiency reports.
- Export Options – Data export for payroll, accounting, and customer service use.