| **Service Center Software vs. In-House Development Functionality** | | | |
| --- | --- | --- | --- |
| **Service Box** | **Jobber** | **Field Force Tracker** | **In-House Development** |
|  |  |  |  |
| Has: | Has: | Has: | Has: |
| Tech calendars/availability | Tech calendars/availability | Tech calendars/availability | Tech calendars/availability |
| Customer service agreement identifier | Customer service agreement identifier | Customer service agreement identifier | Customer service agreement identifier |
| Inventory management |  | Inventory management | Inventory management |
| Customer work history |  | Customer work history | Customer work history |
| Notes can be added by tech | Notes can be added by tech | Notes can be added by tech | Notes can be added by tech |
| Mobile access | Mobile access | Mobile access | Mobile access |
| Routing and mapping | Routing and mapping | Routing and mapping | Routing and mapping |
|  | Reminder calls/messages | Reminder calls/messages | Reminder calls/messages |
|  | Customizable reports | Customizable reports | Customizable reports |
|  |  | Preventative maintenance suggestions | Preventative maintenance  suggestions |
|  |  |  |  |
| Doesn’t have: | Doesn’t have: | Doesn’t have: | Doesn’t have: |
| Reminder calls/messages | Inventory management |  |  |
| No customizable reports | Customer work history |  |  |
| No preventative maintenance suggestions |  |  |  |
|  |  |  |  |
| Pricing: | Pricing: | Pricing: | Pricing: |
| $400+ per month plus onboarding | $180 per month for up to 30 users plus $19 per month for each above 30 | $49.99 per user per month depending on bundles chosen plus $299 set up fee | $33,080 to develop  $3,280 per month maintenance |

Hi, Carlie –

My opinion on Software as a Service versus installed software is to go with the Software as a Service. It has many advantages over the installed. I especially like the fact that it’s easier to maintain and upgrade.

SaaS Advantages

* Faster to get it up and running for your company
* Cheaper and easier to maintain and upgrade
* SaaS vendors have a vested interest in providing you with good service since they get paid on an ongoing basis
* More upgrades and faster customer service
* More user-friendly programs.
* Security for data hosted in a web-based program is the responsibility of the SaaS vendor.
* Security from external attacks for data stored with hosted applications is actually greater than a company could manage on-premise.

Saas Disadvantages

* Less control over the software and how it’s implemented
* Company well-being becomes intimately tied with theirs
* Importance of Internet connection reliability takes on a higher degree of importance
* Paying periodic subscription fees could be more expensive in the long term
* You risk losing your data if the third party becomes insolvent

Installed Software Advantages

* More customizable
* Allows for stronger and more in-depth integration with other IT and operational systems
* Directly control the data, security and processes relating to the software

Installed Software Disadvantages

* Large upfront costs
* Suffers from time constraints. Time spent training users on the system and integrating it with existing IT structures can be costly
* Not accessible everywhere

I feel SaaS will continue to grow and expand in the coming years. I believe the disadvantages don’t cancel out the advantages and we’ll be in a better spot if we start with SaaS.

Thanks

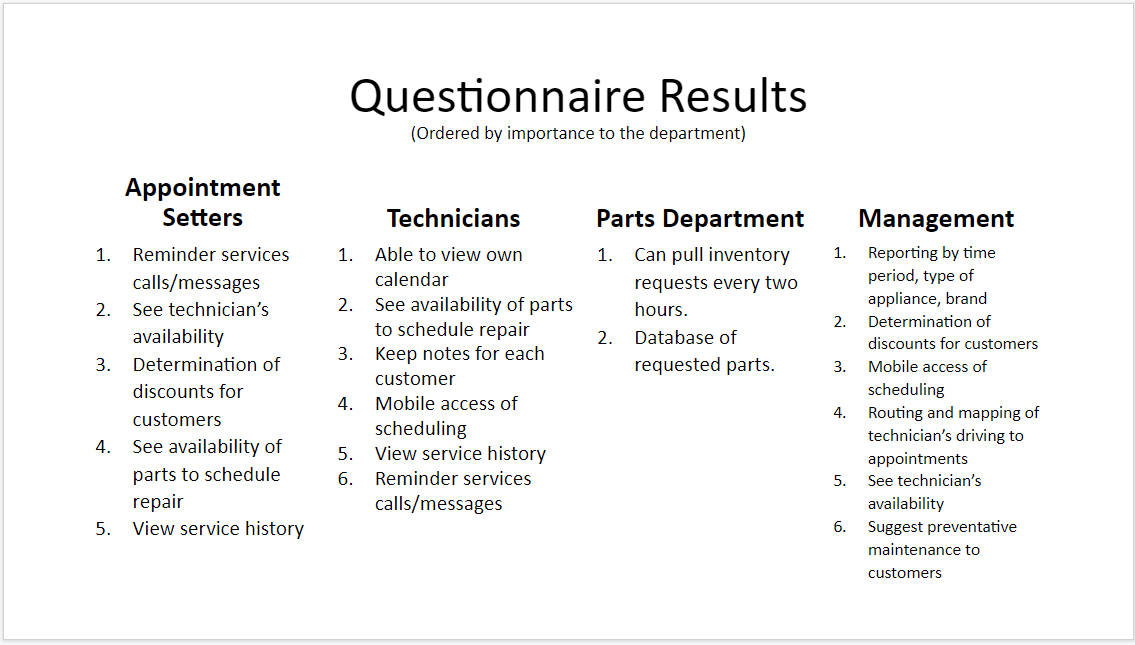
Leah

**System Functionality Must Haves and Nice to Haves**

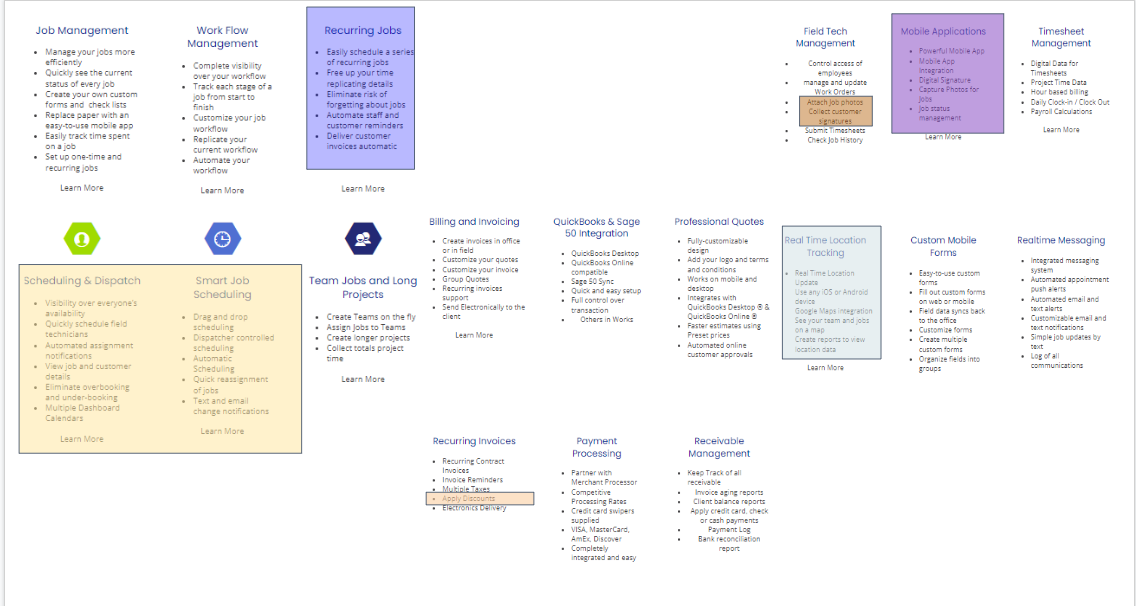
| Must Haves | Nice to Haves |
| --- | --- |
|  |  |
| Reminder services calls/messages | Customer portal for online booking |
| See tech availability | Automate workflow |
| Discount calculations for customers | Reduce paper |
| Parts availability | Create quote/invoice in field |
| Service history | Google calendar integration |
| Ability to see schedule calendar | Print and scan barcodes |
| Note taking for each customer | 24/7 live support |
| Mobile access of scheduling | In person training |
| Pull inventory requests every 2 hours | SaaS |
| Parts database |  |
| Customizable reporting |  |
| Routing/mapping of tech driving to appointments |  |
| Suggest preventative maintenance |  |
| Realtime messaging between office and field |  |
|  |  |

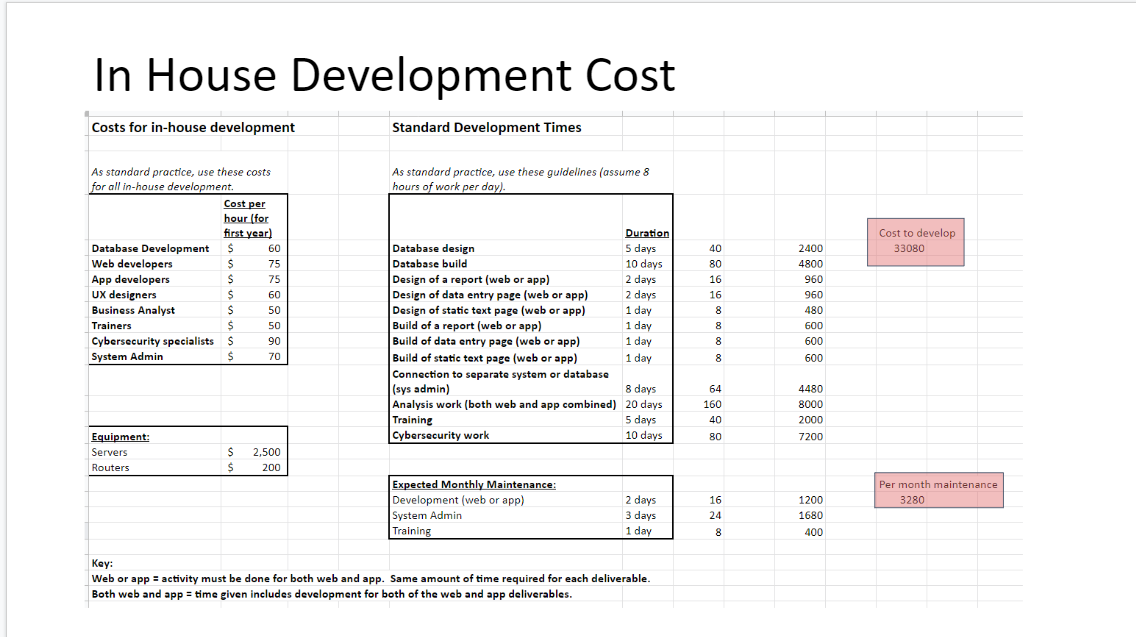
**Software Presentation**

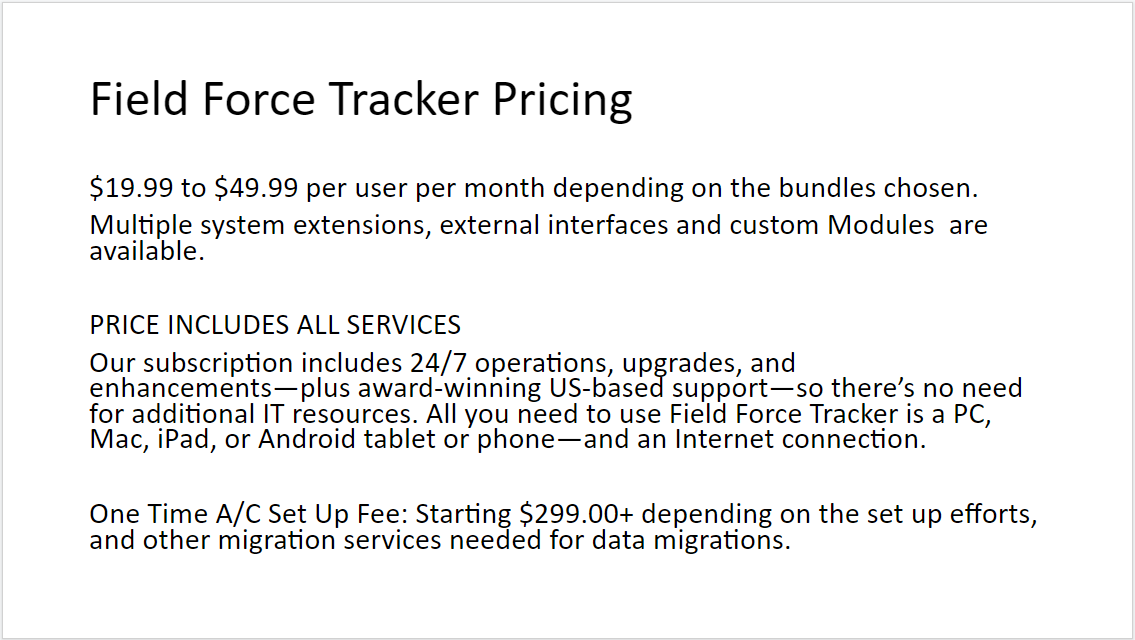
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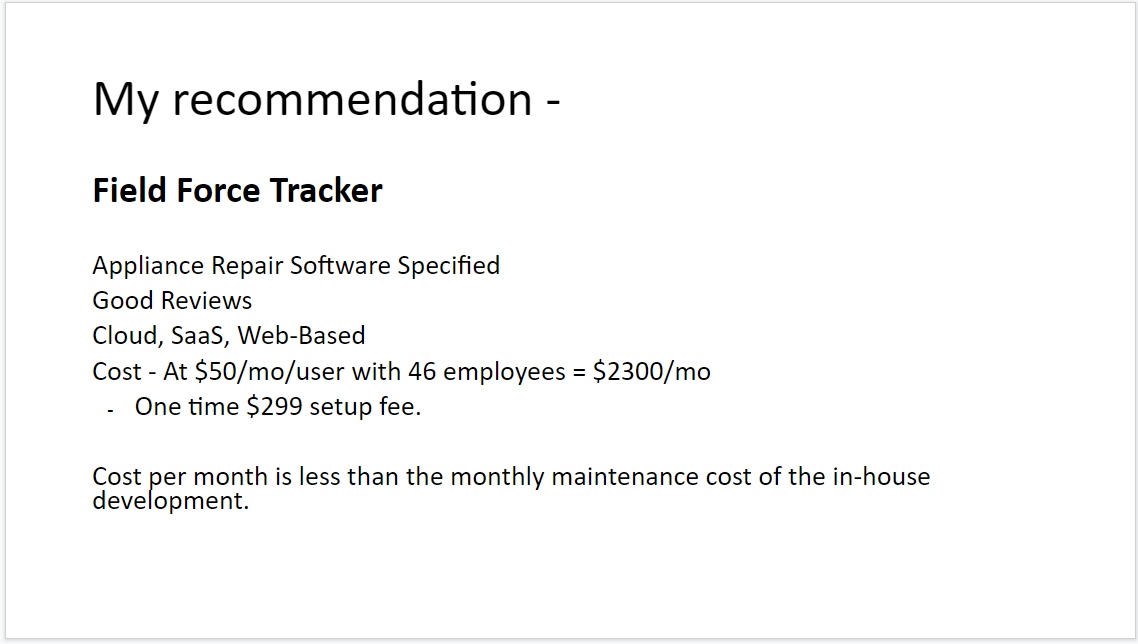
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