



Case Study

Work Order Management

Purpose Built Software: \$920 / yr

QuickTemplate: \$108 / yr



Oscar

Overview

Oscar runs a small mobile auto detailing business. His employees drive out to customers' houses and clean their cars up in their driveways.

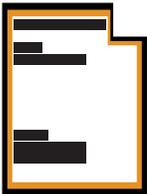
Problem

Oscar is having problems collecting and sending information to his mobile workforce in an organized way. They are currently using a combination of text and E-mail to communicate but things are getting lost and there is a lot of confusion.

QuickTemplate Solution

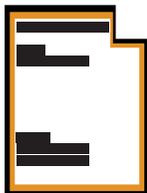
We created two templates and workflows to allow Oscar and his team to communicate in a structured organized way. This helps them to work more efficiently and do more business. See below for a description of each.

Work Order Template



The work order template is filled out by Oscar when a customer calls and requests detailing service. The form contains information about the customer, the job, and the car. It has all the information a tech needs to get the job done. Oscar uses the built in E-Sign capabilities to assign the work order to one of his techs

New Customer Template



Offentimes while a tech is performing his work he will encounter another person who wishes to have their car detailed. Oscar would like to add these people to his marketing lists. To accomplish this a new customer template was created for the tech to capture all of the prospects information. Once complete the tech uses the built in E-Sign capability to send those details to Oscar.