Service Fusion

Implementation Quick-Start Guide

Discovery
During the initial Discovery call, your Implementation Manger will learn about your business and help you prepare to go-live with Service Fusion.

Data
We understand the importance of getting your historical information into Service Fusion. Your Implementation Manager will help you understand what we can import and provide easy-to-use import templates to help.

Training
Learn the core workflow of Service Fusion by taking part in live, pre-recorded, or one-on-one training.

A firm understanding of the following foundational items will ensure you get off to a great start!

Admin / Setup (Things to do)

- ☐ Adjust your company information and settings
- ☐ Upload your logo
- ☐ Add employees and adjust permissions
- ☐ Add payment gateway
- ☐ Adjust email notifications
- ☐ Edit or create communication templates
- ☐ Create taxes, job categories, and referral sources
- ☐ Create warehouses (if needed)
- ☐ Create job templates (if needed)
- ☐ Complete data import
- ☐ Connect to QuickBooks (if needed)

Core Workflow Training (Things to know)

- ☐ Creating and managing your customer list
- ☐ Creating and managing estimates and jobs
- ☐ Managing the dispatch grid and calendar
- ☐ Adding to and adjusting your product/service catalog
- ☐ Logging technician drive and labor time
- ☐ Creating invoices and taking payments
- ☐ Running reports
- ☐ Using the field worker app

Ready to get started?

Training   **Setup Resources**   **Knowledge Base**