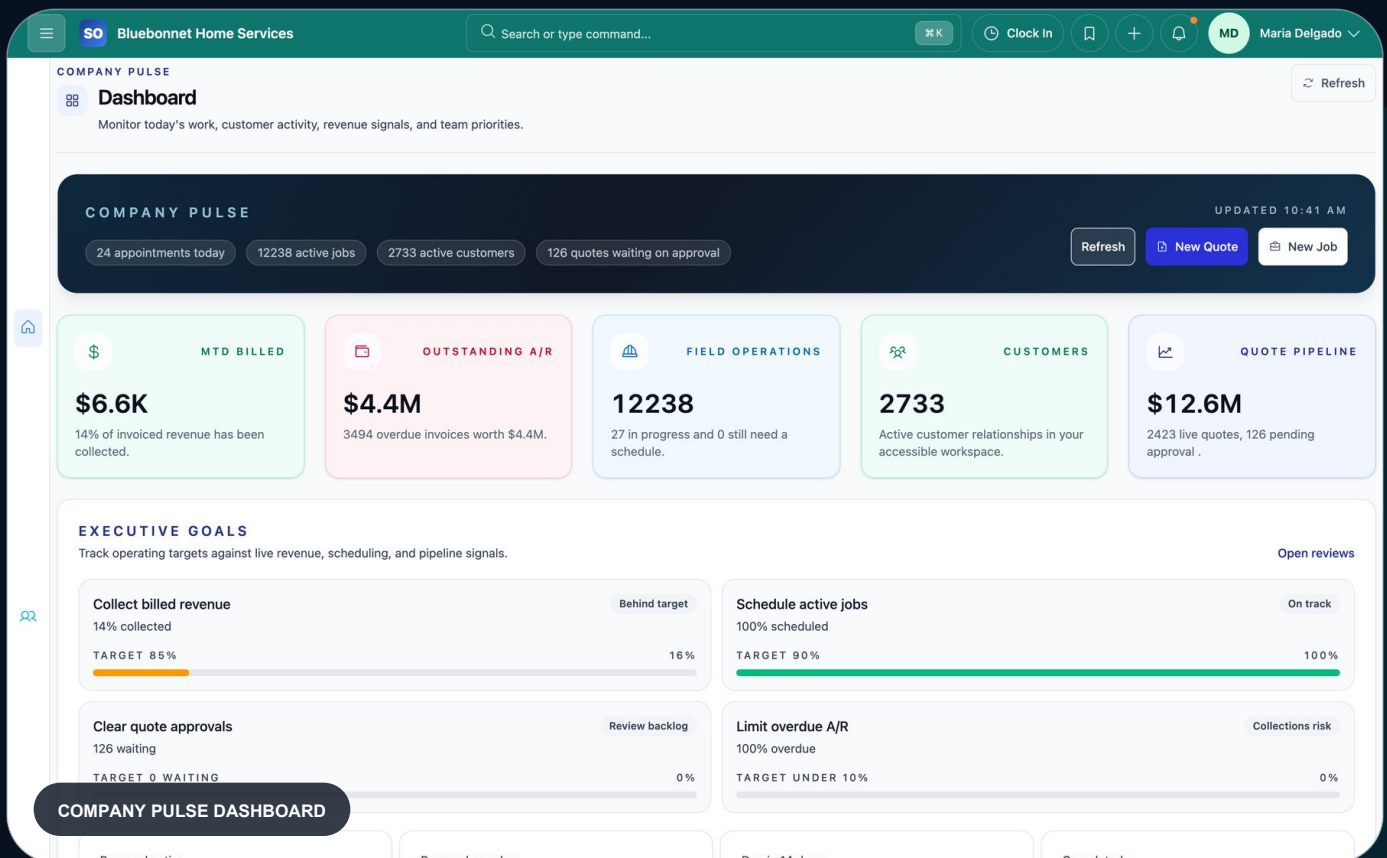


# Run the whole service business. One connected system.

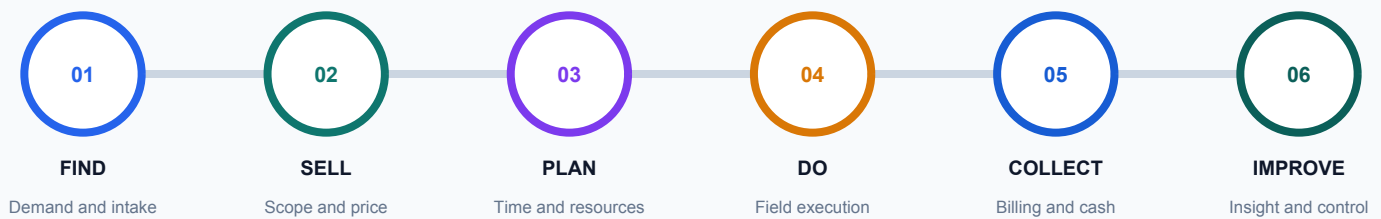
Customers, sales, dispatch, field work, inventory, billing, people, and reporting - connected around the work your company performs.



THE CONNECTED SERVICE DAY

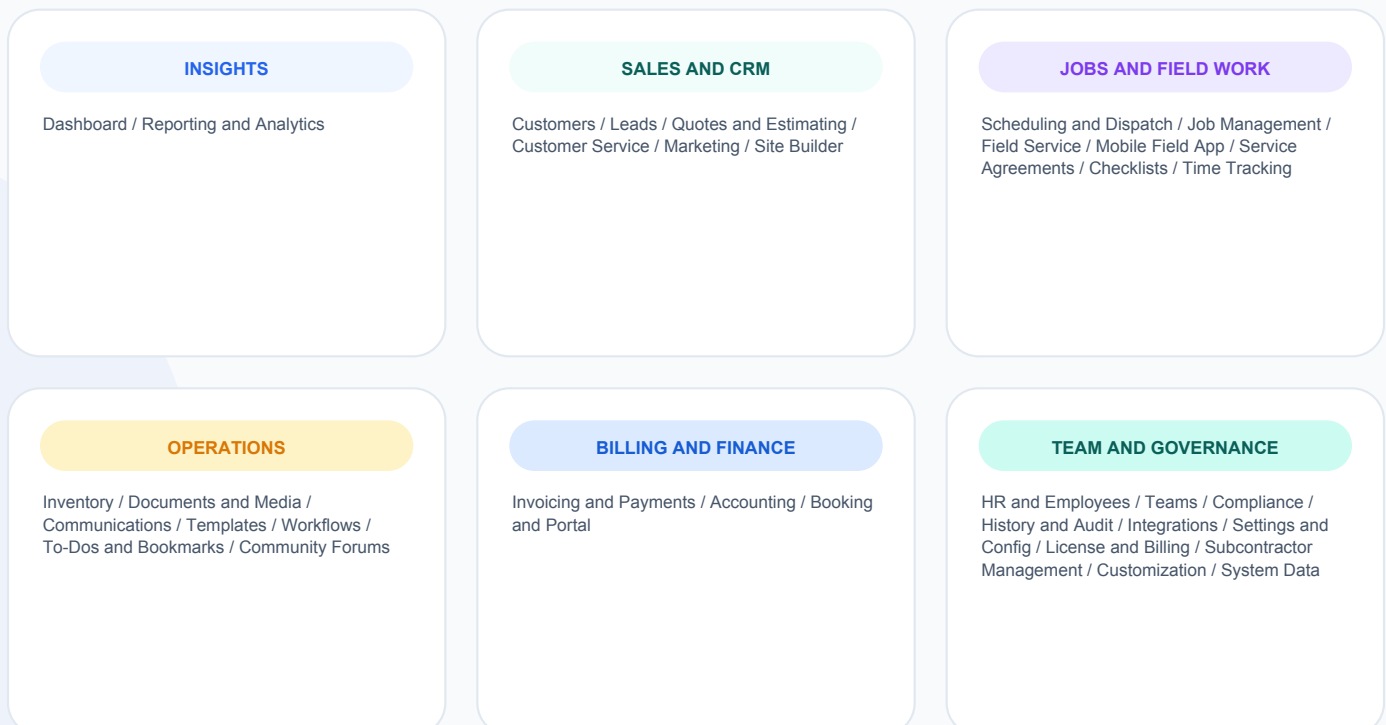
# One system from demand to insight.

Each team works from the same customer, scope, schedule, job, financial, and audit context instead of rebuilding the story at every handoff.



## 35 feature areas. One operating model.

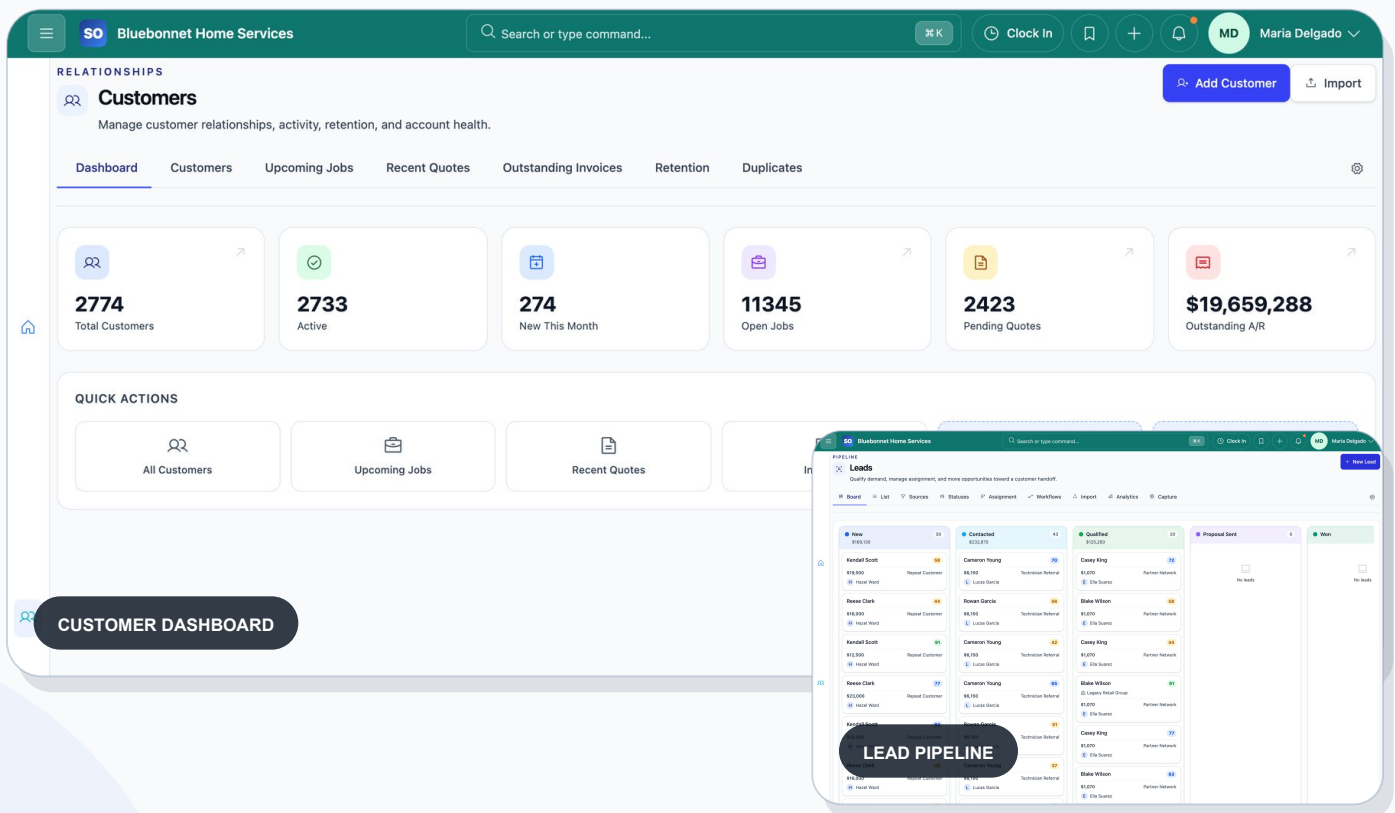
Current product catalog



## CUSTOMERS AND DEMAND

# Know the customer. Own every follow-up.

Keep account history, new demand, service issues, and growth activity connected to the people responsible for the next action.



## KEY

**Customer context**

Customers, contacts, sites, equipment, jobs, quotes, invoices, balances, relationships, retention, and duplicate review.

## KEY

**Demand ownership**

Lead capture, source attribution, scoring, pipelines, assignment, follow-up, and conversion into real work.

## KEY

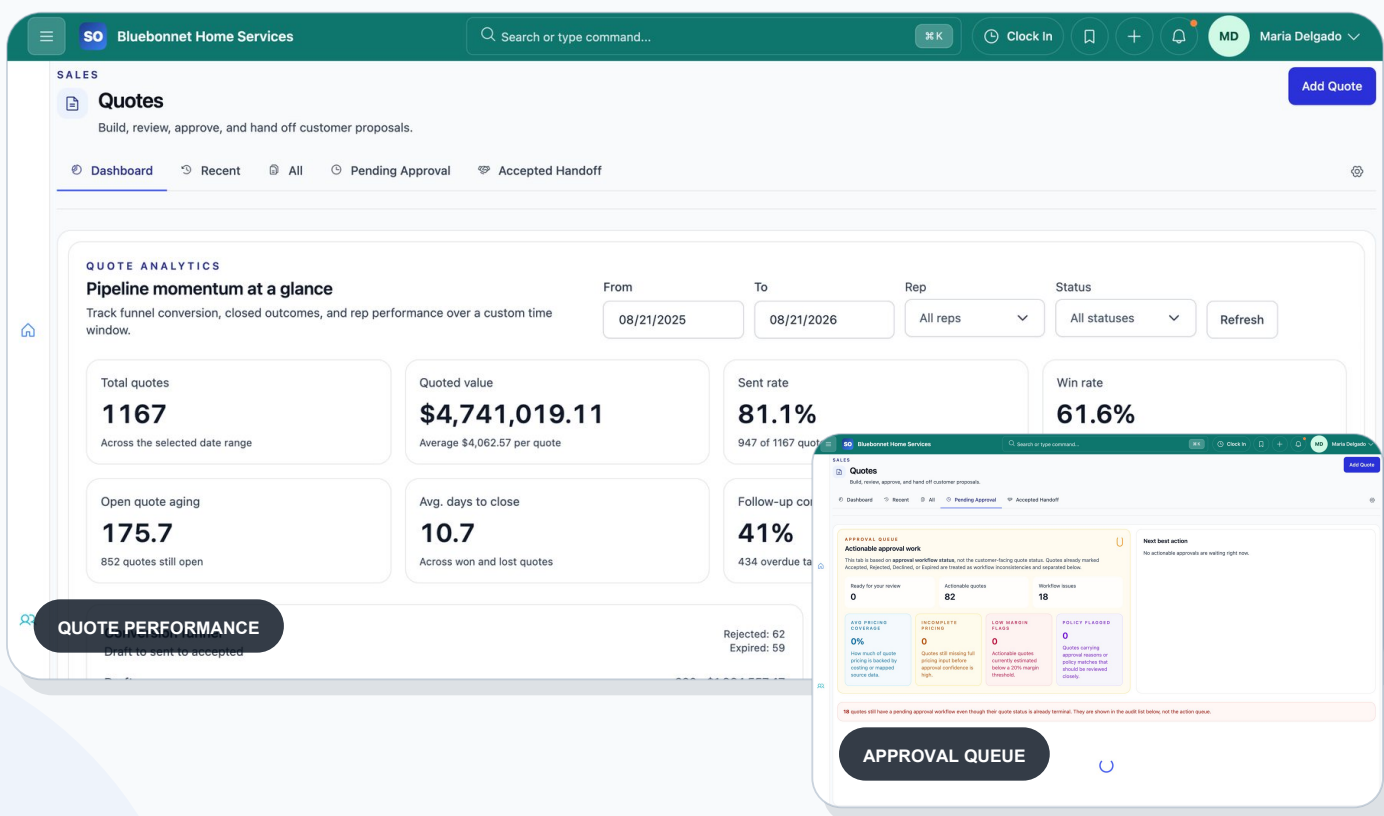
**Service and growth**

Customer service queues, priorities, callbacks, campaigns, landing pages, referrals, reviews, and communication preferences.

## QUOTES AND RECURRING REVENUE

# Sell clear scope at the right price.

Build proposals customers can understand and operations can deliver, with reusable content and approval controls behind the promise.



### KEY

#### Quotes and estimating

Itemized scope, pricing, options, margin context, version history, delivery, acceptance, and conversion into jobs.

### KEY

#### Standards and control

Quote, invoice, receipt, document, onboarding, and checklist templates with internal approval policies.

### KEY

#### Repeatable revenue

Service agreements, recurring maintenance commitments, renewals, customer history, and schedule-ready follow-on work.

## SCHEDULING AND BOOKING

# Build a schedule that can survive the day.

Balance demand, skill, time, location, resources, and customer commitments across the office, technicians, and public booking experience.

| Name                                      | Description                                              | Duration | Price     | Status | Actions                             |
|-------------------------------------------|----------------------------------------------------------|----------|-----------|--------|-------------------------------------|
| Cooling Precision Tune-Up over: 1         | Seasonal preventive maintenance for cooling systems.     | 1h 30m   | \$125.00  | Active | <a href="#">✎</a> <a href="#">✖</a> |
| Heating Safety Check over: 2              | Seasonal heating inspection and combustion safety check. | 1h 30m   | \$135.00  | Active | <a href="#">✎</a> <a href="#">✖</a> |
| No-Cool Diagnostic over: 3                | Diagnostic visit for cooling outage or poor performance. | 2h       | \$185.00  | Active | <a href="#">✎</a> <a href="#">✖</a> |
| No-Heat Diagnostic over: 4                | Diagnostic visit for heating outage or poor performance. | 2h       | \$185.00  | Active | <a href="#">✎</a> <a href="#">✖</a> |
| Water Heater Replacement over: 5          | Tank or tankless water heater replacement.               | 3h       | \$2850.00 | Active | <a href="#">✎</a> <a href="#">✖</a> |
| Electrical Panel Upgrade over: 6          | Panel replacement or service upgrade.                    | 3h       | \$4800.00 | Active | <a href="#">✎</a> <a href="#">✖</a> |
| Whole-System Replacement over: 7          | Complete system replacement.                             | 10h      | \$9800.00 | Active | <a href="#">✎</a> <a href="#">✖</a> |
| Drain and Sewer Stoppage clearing over: 8 | Drain and sewer stoppage clearing service.               | 2h       | \$125.00  | Active | <a href="#">✎</a> <a href="#">✖</a> |

## KEY

## Planning views

Scheduler, calendar, list, analytics, capacity context, technician jobs, and personal agendas for a shared plan.

## KEY

## Resource fit

Working hours, skill fit, availability, time off, routes, duration, buffers, blackouts, and appointment conflicts.

## KEY

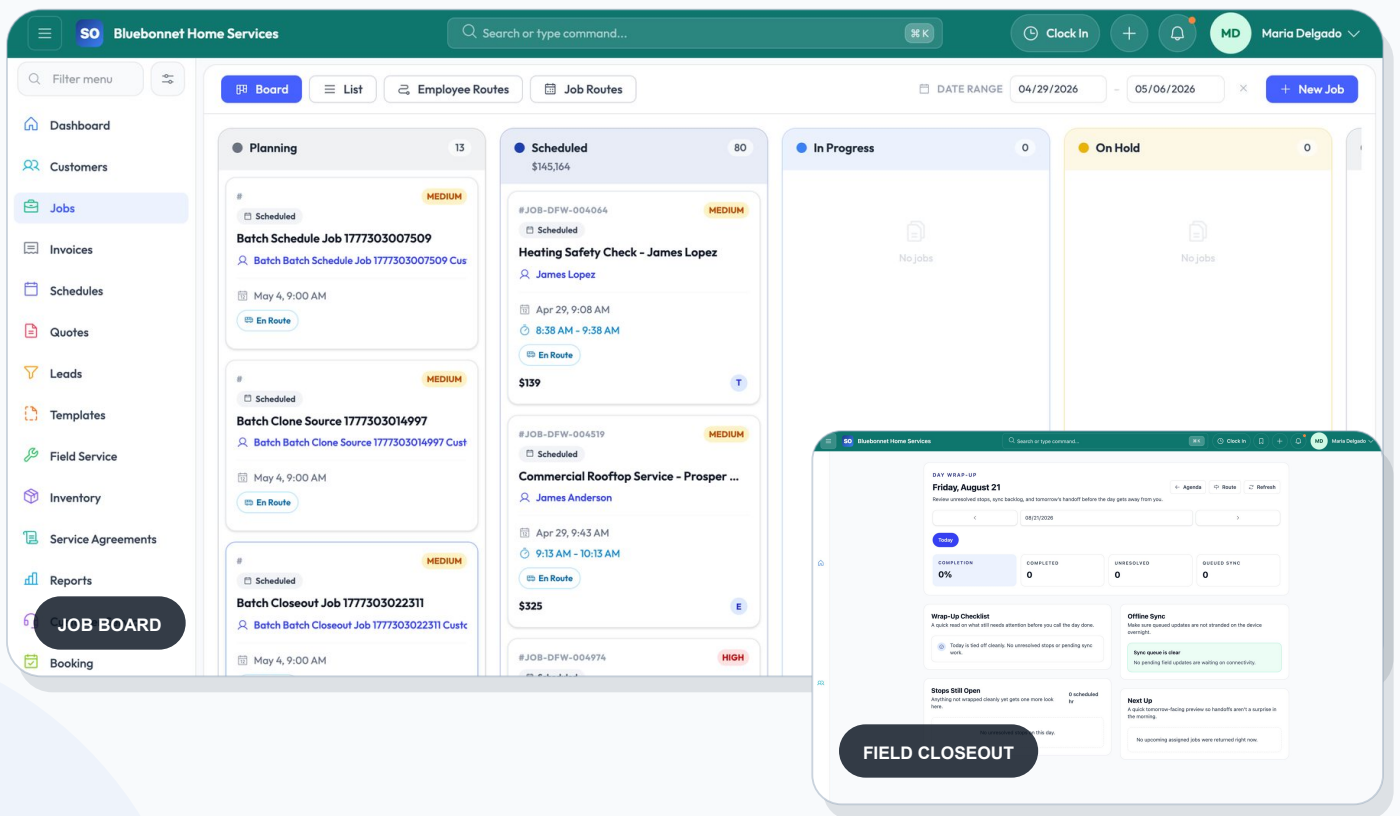
## Customer booking

Service types, fixed-price offers, booking controls, portal requests, and real resource-ready self-scheduling.

JOBS AND FIELD EXECUTION

# Give the field the full job story.

Carry the promise into the truck with scope, customer history, site context, materials, safety, proof, and closeout requirements intact.



KEY

## Job management

Work orders, status boards, routes, crews, scope, notes, materials, subcontractors, dependencies, and billing readiness.

KEY

## Mobile field work

Assigned jobs, route order, offline-friendly updates, photos, notes, safety capture, status, proof, and customer closeout.

KEY

## Repeatable execution

Checklists, time tracking, approvals, documents, media, customer messages, internal coordination, and task follow-up.

## Keep parts and operations ready.

[illegible]

Items, categories, units, warehouses,  
truck stock, stock levels, bundles,  
serials, batches, and location transfers.

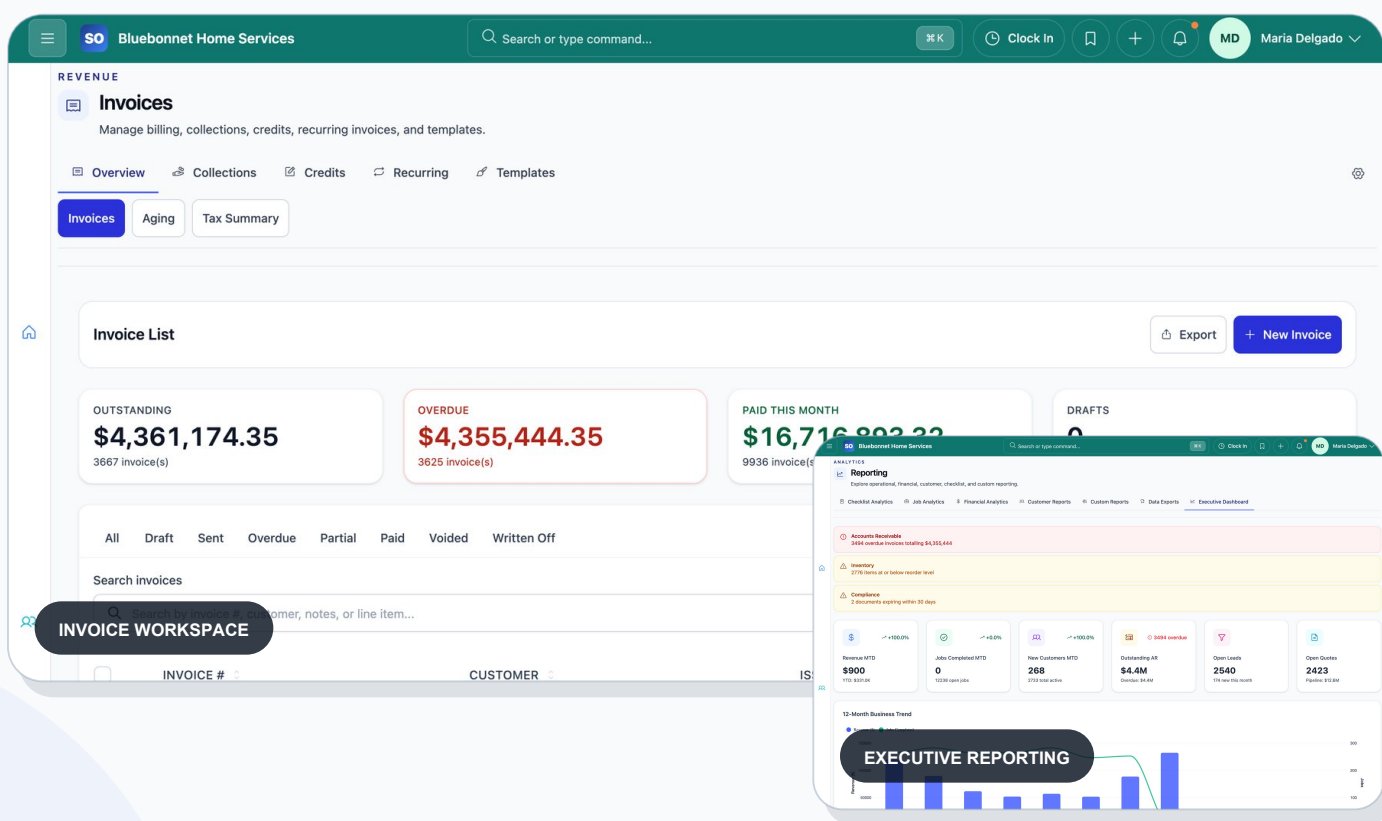
Vendors, RFQs, quote comparison, purchase orders, receipts, replenishment signals, and job-readiness context.

Documents, media, templates, communications, workflow rules, to-dos, bookmarks, and searchable community knowledge.

## BILLING, ACCOUNTING, AND INSIGHT

# Move completed work into cash.

Carry clean job detail into billing, reconcile the exceptions, and give leadership an operating and financial view of the business.



## KEY

## Billing control

Invoices, payments, aging, reconciliation, refunds, write-offs, credit notes, tax summaries, and recurring billing.

## KEY

## Accounting choice

Use native accounting or coordinate QuickBooks Online and Xero connections, mappings, dimensions, exports, and sync logs.

## KEY

## Decision support

Checklist, job, financial, customer, custom, and executive reporting for throughput, cash flow, retention, and trends.

PEOPLE, GOVERNANCE, AND CONFIGURATION

# Run the team with control.

Keep workforce readiness, risk, audit history, permissions, settings, and external handoffs visible without turning the system into a black box.

The screenshot displays the Service Opus interface for 'Bluebonnet Home Services'. The main section is 'HR & People', which includes a search bar and a navigation menu with options like Time Off, My Timesheets, Approvals, Expenses, Safety, Payroll, Time Analytics, Holidays, Training, Announcements, and Certifications. The 'Certifications' section is active, showing a summary of employee certifications: 0 expired, 8 expiring within 90 days, and a total of 8 items. Below this is a table of certification items.

| EMPLOYEE         | CERTIFICATION                             | ISSUING AUTHORITY                            |
|------------------|-------------------------------------------|----------------------------------------------|
| Victor Santos    | Texas Journeyman Electrician #CERT-000028 | Texas Department of Licensing and Regulation |
| Cameron Joyce    | Texas Journeyman Electrician #CERT-000035 | Texas Department of Licensing and Regulation |
| Daphne Jefferson | EPA Section 608 #CERT-000042              | EPA                                          |
| Janeiro Flores   | Texas Journeyman Electrician #CERT-000049 | Texas Department of Licensing and Regulation |

An overlay titled 'COMPLIANCE DASHBOARD' is shown, providing a detailed view of compliance risks. It includes a summary of 4493 expired items, 76 critical expiring within 7 days, 236 warning expiring within 30 days, and 59 upcoming expiring within 60 days. Below the summary is a table of compliance items.

| ID   | NAME                                 | ENTITY             | ISSUE       | EXPIRY DATE   | STATUS  | ACTIONS |
|------|--------------------------------------|--------------------|-------------|---------------|---------|---------|
| 4493 | Liberty Organics Urgent Care         | Quinta Q-OFW-01640 | Feb 6, 2024 | 90% completed | Expired | View    |
| 4494 | Aria Parker                          | Quinta Q-OFW-01640 | Feb 6, 2024 | 90% completed | Expired | View    |
| 4495 | Mia Quintero                         | Quinta Q-OFW-01640 | Feb 6, 2024 | 90% completed | Expired | View    |
| 4496 | Caleb Bennett                        | Quinta Q-OFW-01640 | Feb 6, 2024 | 90% completed | Expired | View    |
| 4497 | Canyon Grand Prairie Sports Medicine | Quinta Q-OFW-01640 | Feb 6, 2024 | 90% completed | Expired | View    |
| 4498 | ...                                  | ...                | ...         | ...           | ...     | ...     |

KEY

## People readiness

Employees, teams, time off, expenses, payroll review context, safety, training, certifications, announcements, and org structure.

KEY

## Risk and audit

Compliance expirations, evidence, incidents, history, retention, activity trails, permissions, and subcontractor oversight.

KEY

## Company controls

Integrations, company settings, calendar and approval rules, license billing, customization, and controlled system data.

## GROWTH + EXTENSIBILITY

# Build demand. Let customers book. Keep the work connected.

Use Site Builder, public forms, fixed-price self-scheduling, integrations, and the Service Opus community to extend the same operating system beyond the office.

## Bluebonnet Home Services

Reliable service. Clear pricing. Book online.

### Drain cleaning

# \$189

[CHOOSE A TIME](#)

### Tuesday

[8:00 AM](#)[10:30 AM](#)[1:30 PM](#)

#### SITE BUILDER

Pages, forms, domains, SEO, previews, and publishing checks.



#### SELF-SCHEDULING

Fixed-price offers with live, resource-ready appointment times.



#### EXTENSIBLE PLATFORM

Integrations, forums, documentation, settings, and mobile workflows.

## See Service Opus with your own workflow.

[SERVICEOPUS.COM](https://SERVICEOPUS.COM)[CARE@SERVICEOPUS.COM](mailto:CARE@SERVICEOPUS.COM)

Self-scheduling reserves appointments; payment collection is not part of the current release.