



Results Software Messaging Framework

Version 1.0 | May 2025

Results Overview

30 Words:

Results is an all-in-one CRM for Service Operations and Field Service Management. The award-winning software streamlines operations, enhances customer relationships, centralizes information, and integrates with QuickBooks and other popular apps.

50 Words:

Results is an all-in-one CRM for Service Operations and Field Service Management. The award-winning software provides a 360-degree view of clients and other important business relationships. Streamline operations and enhance customer relationships by managing your contacts, sales, projects, processes, and billing with Results. Results offers seamless integration with QuickBooks and other popular apps.

100 Words:

Results is an all-in-one CRM for Service Operations and Field Service Management. The award-winning software provides a 360-degree view of clients and other important business relationships. Results efficiently manages contacts, sales, projects, processes, and billing, enhancing customer relationships. With its flexible and intuitive interface, the software becomes an indispensable asset for businesses across diverse sectors, facilitating efficiency, success, growth, and enhanced customer service. Seamlessly integrating with QuickBooks, Results eliminates double data entry and ensures users always obtain the most accurate and up-to-date information. Other integrations include QuickBooks, AvaTax, Zapier, Outlook, Gmail, SMS/Text, WhatsApp, and Calendly.

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Overview and Feature List:

Results is an all-in-one CRM for Service Operations and Field Service Management. This award-winning software provides a 360-degree view of clients and other important business relationships. Streamline operations and enhance customer relationships by managing your contacts, sales, projects, processes, and billing with Results.

Three Benefits:

1. Optimize operations.
2. Deliver exceptional service.
3. Grow business relationships.

Key Features: (6 or 8)

- **Business Relationship Management.** Keep your entire team on the same page with easy access to a 360-degree view of client and contact history, including communications, orders, project status, invoice and payment information, important documents, and all other essential relationship details.
- **Processes and Workflows:** Automate routine tasks and workflows to maintain consistency and efficiency. By standardizing processes, errors are reduced, policies are enforced, and service quality is assured.
- **Task Management & Service Delivery.** Stay on task and on time, with full visibility and access to individual and team calendars and to-do lists. Manage and organize follow-up tasks, projects, and service delivery schedules to maximize every opportunity and ensure nothing is overlooked.
- **Document Management.** Centralize essential documents to give users easy access to agreements, proposals, pictures, diagrams, equipment instructions, and user manuals. Ensure that no one ever spends time looking for important files or documentation.
- **Project Management:** Keep track of commitments and deadlines, ensuring that promises are fulfilled on time. Know the status, access any project's progress notes and details, and see the remaining steps to complete it.
- **Sales Management.** Effortlessly track and manage the lead to opportunity to the sales pipeline. Streamline the sales process by creating quotes that can be seamlessly converted into sales orders and invoices.
- **Time Billing and Invoicing.** Improve cash flow and ensure accuracy by seamlessly and instantly converting estimates, sales orders, and billable jobs to invoices.
- **QuickBooks & Other App Integration:** Results integrates seamlessly with popular applications, eliminating the need for double data entry and ensuring users always have access to the most up-to-date information. Integration options include QuickBooks (Online and Desktop), AvaTax, Zapier, Outlook, Gmail, SMS/Text, WhatsApp, and Calendly.



Results FSM Solution

30 Words

Results is an all-in-one CRM for Service Operations and Field Service Management. The award-winning software streamlines operations, enhances customer relationships, centralizes information, and integrates with QuickBooks and other popular apps.

For the Office

Results effortlessly bridge the gap between office staff and field operations, enabling real-time job monitoring and effective collaboration with field teams. Results FSM streamlines workflows to enhance productivity and ensure exceptional service delivery.

Field Crew Management: Results allows managers to dispatch crews efficiently and to track and distribute resources, including technicians, equipment, and materials. By optimizing resource allocation based on availability, technical skills, and locations, Results FSM ensures that office operations run smoothly and that jobs and projects stay on track to be completed on time.

- **Streamlined Communication:** Our FSM solution streamlines communication between the office and field technicians. Office staff can easily assign or re-assign tasks, send updates, and communicate instructions or change orders to field technicians in real time. From the field, technicians can update and make notes on jobs and send photos that are instantly available in the office. Such communication improves coordination and ensures everyone is on the same page, leading to more efficient service delivery and client satisfaction.
- **Improved Work Order Management:** Managers can create, track, and manage work orders, dispatch teams, and set appointments in Results. Prioritize tasks, distribute resources efficiently, and monitor progress, resulting in improved workflow management and prompt task completion.
- **Enhanced Customer Service:** Results FSM enables office staff to provide better customer service by providing a complete and up-to-date history of customer jobs and projects, service history, preferences, and all relevant data. Respond quickly to customer inquiries, provide correct information about service appointments, and address any issues or concerns that may arise.
- **Increased Productivity and Consistency:** Results FSM provides automated workflow management, ensuring consistency and efficiency by automating the assignment of routine tasks, effectively reducing manual errors, ensuring that nothing is overlooked, and enforcing best practices and company procedures.
- **QuickBooks Integration**
QuickBooks integration streamlines the billing process, reduces manual data entry, eliminates the need for double data entry, and speeds up the collection of receivables. Office users can see clients' billing and payment history without QuickBooks access.



For the Field

Results FSM enables efficient job performance by equipping field technicians with the necessary tools and information to carry out their tasks, ensuring high-quality service delivery through effective communication with office staff and customers.

- **View complete Account History.** Results FSM provides field technicians access to comprehensive account histories of customers they are servicing, including past service records, equipment installed, and any earlier interactions, enabling technicians to understand customer needs better.
- **Access Work Orders & Checklists Onsite.** Results FSM allows field technicians to access work orders, checklists, and schedules directly from their mobile devices. Additionally, they can capture signatures and pictures linked automatically to the job, aiding in documentation and record-keeping.
- **Create Quotes & Invoices:** Results FSM allows field technicians to generate and manage quotes and invoices directly from their mobile devices. Technicians can provide pricing information to customers on-site, streamline billing processes, and ensure accurate documentation of services delivered.
- **Communicate with Office Staff:** Results FSM facilitates communication between field technicians and office staff. Technicians can update job statuses, provide progress reports, and communicate issues or requirements to the office in real-time, ensuring seamless coordination and collaboration between field and office teams.
- **Record Signatures, Notes, and Photos:** Field technicians can easily record customer signatures, written or voice-to-text notes and upload photos directly within Results, automatically linking them to the client and project. This functionality enables technicians to document important information, capture evidence of completed work, and provide detailed reports to customers and office staff.
- **Communicate via SMS to Customers:** Field technicians can communicate with customers via SMS in Results, providing status updates, appointment confirmations, and other relevant information directly from the field, making customers feel informed and engaged throughout the service process.

Call-to-Action Options:

- Manage your business with Results! Get a Demo
- Start managing your company with Results! Get a Demo / Learn More
- Ready to learn more? See how companies experience growth with Results. Get a Demo