



Welcome to ServiceM8!

Here's a checklist to help you get started with ServiceM8.

Welcome to ServiceM8, the job management app for contractors & home services. We've put together a checklist of steps & resources for you to learn the basics and help your field service clients transform their businesses with ServiceM8 & QuickBooks Online.

1 Check out the ServiceM8 basics

- Learn how ServiceM8 & QuickBooks Online can [help you & your clients](#).
- Take the [ServiceM8 Tour](#) to see what it can do across a field service business.
- Need a list? Check out the full [ServiceM8 feature overview](#).
- Learn [how the integration works](#) with QuickBooks Online.

2 Try ServiceM8 out yourself

- Create a trial account through QuickBooks Online Accountant.
- Check out the [Getting Started Guide](#) to see how a job moves through ServiceM8 from start to finish.
- Don't want to create a trial account? Drop straight into a demo of the [Online Dashboard](#) and [iOS app](#) (download app and tap 'Try Demo').
- Check out the ServiceM8 [Help Centre](#) for help articles & videos covering setup through to advanced features.

3 Talk to clients who need a solution

- Identify field service clients you know are struggling with the kinds of productivity, service & cashflow problems ServiceM8 can help with.
- Suggest they check out the ServiceM8 [Tour](#) or watch a [Webinar](#).
- Schedule a demo or call with clients to discuss & assess whether ServiceM8 could be a good fit. TIP: showing is better than telling - use our [7-day demo accounts](#).
- Consider becoming a [ServiceM8 Partner](#) to access more resources & diversify your offering to include ServiceM8 setup & training services.

4 Get your clients set up

- Create ServiceM8 accounts for your clients through QuickBooks Online Accountant (preferential pricing available!).
- After an account is created via QuickBooks Online Accountant, setup the [client's ServiceM8 access](#).
- Assist clients with further setup & training yourself, send them to the ServiceM8 [Getting Started Guide](#) for self-implementation, or refer them to an independent [ServiceM8 Partner](#) offering setup & training services.

HAVE A QUESTION?

Check out the ServiceM8 [Help Centre](#), send us an email at support@servicem8.com, or get in touch via live chat at www.servicem8.com.