



Adding a Customer and Service is **EASIER** than 1-2-3 !

Set Up the Customer

1

ServMax auto fills service information. Change only if necessary.

Select a default route. Select a property type.

Set Up the Service

2

Select the Start date and time. Choose the type of service. Choose the frequency that suites your customer. Click on the Setup Initial Service button.

You are done!

ServMax supports every service frequency and automatically reschedules their next service.

It also supports multiple technician services. Each additional technician gets a service on their schedule!

Initial setup cost different than the regular cost per service? No problem! Just fill in the initial service cost.

ServMax is a **Service** oriented software program, unlike other accounting oriented software programs. What does this mean? This means that ServMax doesn't treat customers as accounts receivable and services as invoices; it lets you see your customers as customers and your services as services. It's more like the way **you** do business.

ServMax was **originally developed** in conjunction with a pest control company who wanted a software program that worked the same way as his business did. Wanting to see his customers and most everything about them on one screen was important. He didn't want a service for a customer to slip through the cracks as it had with his previous software program. Juggling accounts for customers who had more than one service and with different frequencies was a major problem. Invoices and scheduling should be generated automatically to eliminate the human error factor. Most of all, it needs to be to be easy to use and in a way that makes sense.

ServMax since then, with a little help from our customers, has grown into one of the most power products in the industry today. You'll find many of the same features on other products costing thousands of dollars more.

ServMax customers enjoy our no cost technical support, no charge upgrade within version, a half price new version policy, there is no forms to buy and best of all no yearly maintenance fees.



Add-On Products:

Technician Portal - Runs from any device with an internet browser over the internet to your PC. Techs can print Work Orders & Invoices. Add chemicals used and complete jobs done.



Customers:

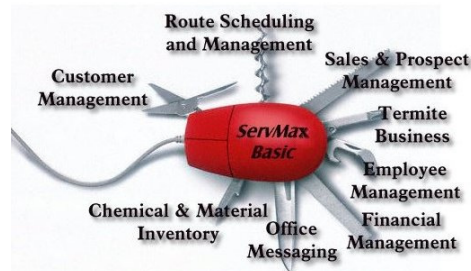
View All Customer Information on One Screen
Condo/Apartment, Real Estate & Property Mgmt. View by Group
Separate Service, Billing and Alternate Address with Multiple Contacts
Skip a service and automatically generate next service
Unlimited Customers, Services, Notes, photos, etc.
Automatic Service Re-Schedule and Invoicing
Attractive Invoices, Work Orders and Statements
Unlimited Types of Services with Flexible Frequencies per Customer
WDO Inspections, Agreement Contracts and Proposals with Images
Automated Advance Payment Handling/Invoicing
Attach Maps, Letters and Images to Customer Account

Scheduling & Employee Management:

Multiple Technician Service Scheduling
Employee Management Including Flexible Payroll Commissions
Management Color Coded Monthly Calendar
Print Service Notes and Past Chemical Usage on Schedule/Work Order
Print either Technician Schedule or Work Order
Technician Text Messaging

Reporting:

Customer Aging, Services not completed, Cancelled and Skipped
Services Completed and Paid
Commissions and Sales Tax
Termite Renewals
Customer Pre-Notification
Post Card Generation
Expense Handling/Reporting
Receipts for any period of time
Report of customer source/referral
Service Analysis Report



Other:

Email Integrated
Chemical (Label & MSD Info), Vehicle and Materials Inventory
Security -turn off ability to view, change, delete or add info anywhere by logon ID
Import/Export with Microsoft Office
Termite Baiting Management with Materials & Services Handling
Graph program with insects, animals, bait stations, doors, windows, etc.
Print Chemicals, dosage, % EPA # on Work Orders
Internet Interface for any device (iPad, Tablet, Netbook, iPhone, Smartphone)
MapPoint Interface
Print Business Cards, Door Hangers and Service Cards with Logo

Your Customer Information All on One Screen

The screenshot displays the ServMax PCO software interface, titled "ServMax PCO - Software for the Pest Control Industry - [Browse Customers]". The interface includes a menu bar (File, Edit, Browse, Maintenance, Window, Help) and a toolbar with various icons for Office Management, Reporting, Setup Tables, Help, Customers, Groups, Route Sheet, Multi-Route, Monthly View, Chemicals, Materials, Employees, Vehicles, Routes, Notes, Messages, Attachments, Agree/Proposals, Inspections, Advance Payments, and Chemicals Used. A contact information section shows "Home: 386-248-6927" and "Work: Cell".

The main area is divided into three sections:

- Customers:** A table listing customer details.

Code	Customer Code	Service Name	Service Address	Balance	Billing Address	Condominium	Service Com
25	25	Archibald, Edith	2294 Ocean Shore Blvd. , Ormond	\$65.00	Archibald, Edith , 1319 Royal Palm		
2	2	Archibald, Peter	1319 Royal Palm Dr. , Edgewater	\$0.00	Archibald, Peter , 1316 Royal Palm		
13	13	Ballantine, Linda	24 Beach Shore Drive , Daytona B	\$0.00	Ballantine, Linda , 24 Beach Shore		
1	1	Beachmont, Karen	57 High Ridge Rd. , Daytona Bea	\$230.00	CLF Property Management Comp		
21	21	Faucets R Us,	901 N. Halifax Ave. , Daytona Bea	\$163.25	Faucets R Us , 901 N. Halifax Av		
22	22	Glick, Leo Palm Tree Golf C	1900 Broadway Building #3, Daytc	\$82.10	Glick, Leo Palm Tree Golf Club, 15		Palm Tree Golf Club
14	14	Harbor Property Manager	36 B Beach Shore Drive , Daytona	\$360.00	Harbor Property Management, 4		
11	11	Harrington, Bruce	805 High Point Dr. , Post Orange f	\$0.00	Harrington, Bruce , 805 High Point		
33	33	James, Malcome	502 N Grandview Ave. , Daytona	\$0.00	James, Malcome , 502 N Grandvi		
- Services:** A table listing service history.

Status Date	Route	Stat	Service	Total Amount	Amount Paid	Balance	WKO #	Discount Amount	Tax Amount	Date Paid	Pd By	Check Numbers	svccd
5/03/12	RTE-3	✓	General Pest Control	\$40.00	0.00	40.00	11-00022	\$0.00	0.00		Du		11120425111344
2/02/12	RTE-3	✓	General Pest Control	\$40.00	40.00	0.00	11-00020	\$0.00	0.00	7/7/2012	Ch		11120111121048
11/03/11	RTE-3	✓	General Pest Control	\$40.00	40.00	0.00	11-00019	\$0.00	0.00	3/2/2011	Ch		11120111121015
8/04/11	RTE-3	✓	General Pest Control	\$40.00	40.00	0.00	11-00018	\$0.00	0.00	4/2/2011	Ch		11110725171900
5/05/11	RTE-3	✓	General Pest Control	\$40.00	40.00	0.00	11-00017	\$0.00	0.00	4/2/2011	Ch		11110725170553
2/03/11	RTE-3	✓	General Pest Control	\$40.00	40.00	0.00	11-00015	\$0.00	0.00	3/2/2011	Ch		11769106150056
- Recurring:** A table defining recurring services.

Service	Frequency	Week	Day	Amount	Other
General Pest Control	Quarterly	1	Thu	40.00	

At the bottom, there is a note: "Services that are done on a recurring basis should be defined above. Only Do Once per Service. This info is used as a template to generate the actual services shown on schedules/WKO's." The status bar shows "Tuesday, September 25, 2012" and "1:15PM".

View customer information - Name, address, phone numbers, balance, prior plus due services, recurring service & frequency, etc. all on this one screen.

View customers by last name, street address, phone #, account code or group. Use the keyboard to enter the customer info and the customer will automatically scroll into view and be highlighted.

Set up a Group. Enter individual service address as a customer. Group service addresses for billing a single person or company (Mortgage company, Property Management company, etc.). View at any time any group with all service addresses showing you if there is any balances or due services.



Personalizing Invoices

We let you set up messages to print on all invoices. We also let you put special messages on a customer's invoice. We let you change the title from Invoice to what you wish to call it. We let you put specials or advertising on your invoices. You can also use this space to warn customers of seasonal pests or wish holiday greetings. You can print happy birthday or anniversary messages on customer Work Orders. In addition, you can print a graphic image to go along with the message.



Other Invoice Options

You can choose whether or not to show prior balances, payments, chemical usage, or even a credit card form for the customer to fill out. You can choose to print/not print invoices where the balance is \$0 (credit card payment or paid in advance). You can also choose to print the customer's next service date on the invoice. If you belong to different association and wish to print their logo, you have a place to show up to 3 logos.

Invoices can be printed with the schedule and/or work orders so you can deliver the invoice at the time of the service.



Work Order Options

Here you can pre-print a chemical list to be completed. These can be set up to be printed differently depending on the service. Print special messages or reminders depending on the service being rendered. Print Maps and/or directions. Print/don't print customer charge and customer signature line. If you use the work order as an invoice also, you can change the name of the form to imply both. You can print prior chemical usage and/or the service grid from the agreement showing the 12-month service schedule. You can print the next service date on the work order if you wish. You can print a Bait Station Summary report for the tech to complete. Also optionally, print the previous Bait Station Activity on the work order.



Route Sheets

Because some companies choose to use Route Sheets instead of Work Orders, this option is available. Here you can also print directions and/or maps. You can print prior chemical usage and/or the service grid from the agreement showing the 12-month service schedule. You can also choose whether to print the customer charge and signature line.



RT-1
4/ 6/2005 thru 4/ 7/2006
Customer Signatures

Service Name: Joseph Devos
3520 Horseshoe Drive N.
239-666-1579
Signature: _____
Com-Commercial P.C.

Service Name: Richard Briggs
12345 West Kingdon Way
5098963
Signature: _____
Gnp-General House.Pc

Service Name: Sue Allen
4040 Orion Rd
239-099-4304
Signature: _____
Law-Lawn P.C.

Service Name: Joseph Schelder
4505 Coral Palms Lane
239-353-2932
Signature: _____
Gnp-General House.Pc

Service Name: Steve Ellis
1100 My Steel
7569
Signature: _____
Law-Lawn P.C.

Service Name: George Phillips
1785 Outshore Blvd. N.
239-252-2245
Signature: _____
Gnp-General House.Pc

Service Name: Earl Rudolf
2630 14th St. N.
239-454-2870
Signature: _____
Law-Lawn P.C.

Service Name: Nantigha Echols
88 Bermuda Road
239-334-
Signature: _____
Lif-Lawn/Foundation

Service Name: Sue Allen
4040 Orion Rd
239-099-4304
Signature: _____
Law-Lawn P.C.

Service Name: Joseph Schelder
4505 Coral Palms Lane
239-353-2932
Signature: _____
Gnp-General House.Pc

Service Name: Steve Ellis
1100 My Steel
7569
Signature: _____
Law-Lawn P.C.

Service Name: George Phillips
1785 Outshore Blvd. N.
239-252-2245
Signature: _____
Gnp-General House.Pc



RT-1
4/ 6/2005 thru 4/ 7/2006
RT-1
Odometer Out: _____ In: _____
Gas Gallons: _____ Gallon Price: _____

Service Name: Jennifer Shore
On The Gulf Breeze Rd., 280
Vanderbilt Beach Rd., Naples FL 34108
1:00 PM 239-789-2211 239-235-3350
Signature: _____
Com-Commercial P.C.

Service Name: Lucile Carter
1234 Tamiami Trail, Naples FL 34102
11:00 AM
Signature: _____
Com-Commercial P.C.



Work Order/Invoice
7590-00012

Account # 7680
Home: 239-255-7281 Work: Jason Newell Cell: 239-495-4148 Page: 841-2828

Service Address:
Neil Simpson
830 108th Ave. N.
Naples, FL 34108

Any information you wish to present to customer may be applied here for each service. e.g. Please water your lawn within 24 hours of this service...

Date	Chemical	Prior Chemical Usage Service	Amount	Measured In
6/30/2005	MAX FORCE FIRE ANT KILLER	Fire Anti Control	1.00	POUNDS
5/27/2005	CORO II	Law-Lawn P.C.	0.50	gallons
5/27/2005	TALSTAR ONE	Gnp-General House.Pc	0.25	GALLONS

ANY TERMS INFORMATION HERE
ANY WARRANTY INFORMATION HERE

ANY INFORMATION YOU WANT HERE AS A FOOTER e.g. a checklist for used chemicals...

QTY	Product	QTY	Product	QTY	Product
___	Suspend	___	Bond	___	Liquid Inert
___	Terra/Outsmart	___	Mon. Stations	___	Liquid Fat
___	Strike Force	___	Fl 365	___	Talcum Granulate
___	Max Force	___	Orthene	___	Weed & Feed
___	Dannon	___	Permethrin Pro	___	Sticker
___	PhosorFlas	___	Malathion		

Notes to Customers:

Thank You!
Balance Forward: \$0.00
Service Total: \$29.25
Tax: \$0.00
Total Due: \$29.25
Amount Paid: _____

Signature: _____ Paid by Cash/Check # _____

Jason Newell 841-2828
FL 34108 239-495-4148
Projected Charge: \$30.00 Tax: \$0.00 Due: \$29.26
Gnp-General House.Pc 0.25 GALLONS
Law-Lawn P.C. 0.50 gallons
Fire Anti Control 1.00 POUNDS
Projected Charge: \$30.00 Tax: \$0.00 Due: \$29.60
Last Date of Service: 12/23/2005
West, Bonita Springs FL 34136 239-5551
Projected Charge: \$45.00 Tax: \$0.00 Due: \$44.00
Last Date of Service: 12/23/2005
L 34103
Projected Charge: \$110.00 Tax: \$0.00 Due: \$110.00
By Phone 1 Week
Location: ORANGE 79
W Back 0.25 GALLONS
Gnp-General House.Pc 0.50 GALLONS
Law-Lawn P.C. 1.00 gallons
Last Date of Service: 2/ 1/2006



Signature Sheets

Some companies want customers to sign that they received services but don't want the customer to sign the work order or route sheet, so we provide a print-out of all the customers being serviced with a place for them to sign. It looks very much like the route sheet except it doesn't have a price or any of the chemicals, directions, maps, or technician comments.



Service Contracts

ServMax has customizable service contracts. There is an Interior, Exterior, Generic, Termite Warranty & Control and a Termite Soil Treatment available for use. The Interior and Exterior contracts have areas where you can provide the service information you need. If you prefer a more generic approach, we have a generic style where you can specify what you want it to say.

Your Logo Goes Here!

Service Contract Interior

Your Company Name Here
Your Address, Second Address Line
Your City, FL 12345
999-555-1111 FAX 555-333-4444 youremail@yourwebsite.com

Customer Name & Service Address: Ms. Nakesha Adams, 625 2nd Ave. N, Naples, FL 34103
Billing Address: Mr. Sue Allen, 4040 Grayton Rd, Naples, FL 34103

Home Phone: 239 355 2580 Work Phone: Contact: Nakesha Adams
Pager: 239 355 5919 Cell Phone: FAX: EMail: support@irissystems.biz

Service Location: 625 2nd St. N. This Contract is Effective for 1 Year Beginning 1/8/2004
Number and Type of Structures to Service

YOUR COMPANY NAME HERE will provide service to achieve control of the following pests:
Ants, Roaches, Silverfish and Spiders

Not to include wood destroying organisms.

YOUR COMPANY NAME HERE will provide continuous service throughout the period contracted. This will include the minimum services stated, plus as many services as may be necessary to maintain pest control. The customer agrees to make the premises available for service and accept such service as indicated. Should premises not be made available, Exterior services will be substituted.

SERVICES TO BE PERFORMED ACCORDING TO THE FOLLOWING SCHEDULE:

	JAN.	FEB.	MAR.	APR.	MAY	JUN.	JUL.	AUG.	SEP.	OCT.	NOV.	DEC.
1	X		X		X		X		X		X	
2												
3												

Your Logo Goes Here!

Service Contract Generic Style

Your Company Name Here
Your Address, Second Address Line
Your City, FL 12345
999-555-1111 FAX 555-333-4444 youremail@yourwebsite.com

Customer Name & Service Address: Ms. Nakesha Adams, 625 2nd Ave. N, Naples, FL 34102
Billing Address: Ms. Nakesha Adams, 625 2nd Ave. N, Naples, FL 34102

Home Phone: 239 355 2580 Work Phone: Contact: Nakesha Adams
Pager: 239 355 5919 Cell Phone: FAX: EMail: support@irissystems.biz

Service Location: 625 2nd St. Palm Ct. This Contract is Effective for 1 Year Beginning 1/8/2004
YOUR COMPANY NAME HERE will provide service to achieve control of the following pests: Service Frequency:
Ants, Roaches, Silverfish and Spiders

Pests To Be Controlled

Services To Be Performed

Your Logo Goes Here!

Service Contract Lawn & Foundation

Your Company Name Here
Your Address, Second Address Line
Your City, FL 12345
999-555-1111 FAX 555-333-4444 youremail@yourwebsite.com

Customer Name & Service Address: Ms. Nakesha Adams, 625 2nd Ave. N, Naples, FL 34102
Billing Address: Ms. Nakesha Adams, 625 2nd Ave. N, Naples, FL 34102

Home Phone: 239 355 2580 Work Phone: Contact: Nakesha Adams
Pager: 239 355 5919 Cell Phone: FAX: EMail: support@irissystems.biz

Service Location: 625 2nd St. N. This Contract is Effective for 1 Year Beginning 1/8/2004

YOUR COMPANY NAME HERE will provide continuous service throughout the period contracted. This will include the minimum services stated, plus as many services as may be necessary to maintain pest control. The customer agrees to make the premises available for service and accept such service as indicated. Factors outside the company's control may affect the condition of the lawn, including, but not limited to, mowing practices, irrigation, supplemental feeding. The company, therefore, in no event shall be responsible for any landscape replacement.

SERVICES TO BE PERFORMED ACCORDING TO THE FOLLOWING SCHEDULE:

	JAN.	FEB.	MAR.	APR.	MAY	JUN.	JUL.	AUG.	SEP.	OCT.	NOV.	DEC.
Insect												
Weeds												
Fertilizer												
Foundation												

Condition of Lawn: Weeds Approx. Sq. Ft.:

Ornaments

	JAN.	FEB.	MAR.	APR.	MAY	JUN.	JUL.	AUG.	SEP.	OCT.	NOV.	DEC.

INITIAL PROBLEMS:

SPECIAL INSTRUCTIONS
Any special instructions may be entered here. If more room is needed, a supplemental page is automatically printed.

Initial Service Cost	Per Service Cost	Total Contract Value	Discount %	Discount Amt.	
\$0.00	\$0.00	\$0.00	0.00	\$0.00	\$0.00

This Contract is Self-Renewing from Month to Month at End of First Year Unless 30 Days Written Notice is Given

Representative _____ Customer _____

Your Logo Goes Here!

Service Agreement Contract

Your Company Name Here
Your Address, Second Address Line
Your City, FL 12345
1-999-NO-PEST FAX 1-555-NO-PEST youremail@yourwebsite.com

Customer Name & Service Address: Mr. and Mrs. Peter Savage, 124 Green St, Naples, FL 34116
Billing Address: Mr. and Mrs. Jacob Scheider, 4505 Coral Palms Lane, Naples, FL 34116

Home Phone: 239-278-6890 Work Phone: Contact: Peter Savage
Pager: Cell Phone: FAX: EMail:

Service Location: 124 Green St. This contract is in effect for 1 year(s) beginning: 12/16/2005 Monthly

This agreement is made by and between the above named Customer and YOUR COMPANY NAME HERE to provide the services as set forth below:

- YOUR COMPANY NAME HERE, hereby agrees to provide service for the following pests:
- YOUR COMPANY NAME HERE, shall service the above stated premise. All areas requiring attention shall be treated as deemed necessary by YOUR COMPANY NAME HERE.
- This agreement shall be effective for the period indicated above and shall renew itself for month to month thereafter until terminated by either party upon sixty (60) days written notice. For multiple year agreements, YOUR COMPANY NAME HERE shall have the right to increase the service charges effective any time after the anniversary date of the initial treatment. Notice of said increases shall be given to the customer in writing at least thirty (30) days prior to them becoming effective, and the customer shall have the right to terminate this contract by giving written notice within ten (10) business days of the receipt of the notice of the increase. If no timely termination notice is given by the customer, the increase rate shall go into effect on the date specified in the notice.
- The cost of the services described herein are shown below. You will receive a monthly invoice. Payment will be due upon receipt of the invoice.
- The materials, chemicals and pesticides are used to provide the services set forth herein shall conform to federal, state and local laws and ordinances, and shall be acceptable to the customer. Materials shall be used in accordance with the Labels and specifications.
- The customer agrees that YOUR COMPANY NAME HERE is not responsible for insect or rodent damages to the premises or its contents, or for personal property, or for personal injury, and the customer specifically releases YOUR COMPANY NAME HERE, from liability for any such claims.
- The customer agrees to cooperate with YOUR COMPANY NAME HERE to ensure success of the pest control services. This shall include making the premises available to YOUR COMPANY NAME HERE, as necessary, take appropriate sanitation measures as recommended by YOUR COMPANY NAME HERE, and take all steps to correct whatever conditions are conducive to the breeding and harborage of pests covered by this contract. If such measures are not taken, any and all guarantees and/or promises made by YOUR COMPANY NAME HERE, shall become null and void.
- It is the customer's responsibility to notify YOUR COMPANY NAME HERE of any and all health conditions of any persons occupying the premises that may be affected by the use of pesticides and/or chemicals used in the extermination of insects or pests set forth in this agreement.
- The customer agrees to use any leased materials of YOUR COMPANY NAME HERE in a proper manner and upon cancellation of this agreement to properly return said materials in good condition, usual wear and tear excepted, to YOUR COMPANY NAME HERE. Any and all materials or equipment lost or destroyed on the customer premises shall be replaced by the customer.
- YOUR COMPANY NAME HERE, has required liability insurance and shall furnish to the customer proof of said insurance upon request.
- At customer's request, YOUR COMPANY NAME HERE will provide information about the chemicals and/or pesticides to be used in treating the premises.
- Any modification or change to the terms and conditions of this agreement must be set forth in writing, signed by either party, prior to the changes being effective.
- This agreement shall be interpreted and be subject to the laws of the state of YOUR STATE

Initial Service Cost	Cost Per Service	Total Contract Value	Discount %	Discount Amount	State/Local Tax
\$0.00	\$0.00	\$342.00	5.00	\$0.00	0.00

This contract will not self-renew. It is in effect for one (1) year.

Customer Signature _____ Company Rep. Signature _____



Time and Materials

We give you the ability to bill time and materials.



Taxable Services

We have a very flexible tax structure. You can set up a company wide tax that will automatically tax all services. You can tax a single customer. You can tax a service depending on the county the customer lives in. You can tax customers depending on their property type (commercial or residential); the type of service and it could change depending on the county the customer lives in.



Customer Documentation

With a click of a mouse, document phone call conversations. Record bait station activities for termite warranty customers. You can also attach any other document, map, work sheet, etc. that you have made up using another program with the ability to launch the attachment from the main customer screen. We provide the technician with an area to document problems or comments with a service. We also provide a means to communicate any problems or comments to the customer on their invoice.



Other Customer Options

We automatically manage and invoice customers who pay for their services in advance.

Customer invoices fit in a standard #10 window envelope. If you do not use a window envelope we can also print a standard #10 non-window envelope for mailing.

With a click of a button, launch MapQuest and get directions and view a map.

Print labels for 1 or more customers.

Use the Search Facility to find customers having the same information such as the same zip code, type of service, renewal date, area code, street address, same service due date, route, property type, etc. When grouped on your screen, you can print the list of customers with their name, address, account number and balance due.

View and find customers with only a few key strokes by entering either the first few letters of their last name, street name, numbers of their home phone number, work phone number, cell phone number, customer account number or letters of their group name.



Route Sheet Window Features

This window provides not only the technicians scheduled services but has y other convenient features.

- Re-Route, Skip or Re-Schedule services
- View customer information with a click of a button
- View directions with a click of a button
- Change service time on a due service
- Print post cards
- Use the MapPoint interface



Employee Optional Features

- Print business cards with or without photo images
- Print ID badges

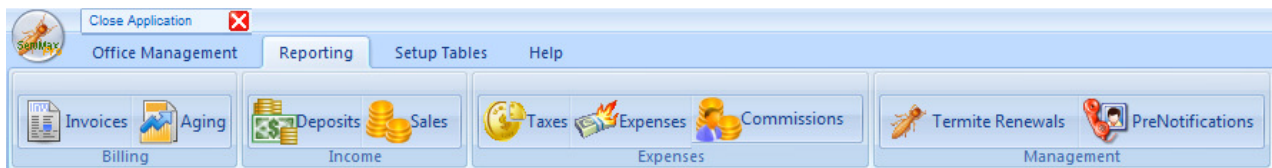


Inventory Features

- Download or enter chemical URL for instant MSDS and Label viewing
- Enter chemical purchases and print report
- Enter and report vehicle maintenance information
- Enter and report vehicle inspection information
- Enter and report expenses related to inventory



Reporting Features



- These reports are available for any period of time not just the current month or year.
- Print Invoices for your regular, advanced payment and your group payment customers.
- Review overdue accounts, print statements and Aging Reports.
- View/ print a report of Termite Warranty Renewals due. Print Post Cards.
- Print Sales Tax report.
- Use the Pre-Notify window to call your appointments. Send Post Cards.
- Print a deposit report for your banking needs.
- View and report of cancelled services, due services, completed services and skipped services.