



Home Watch Business Management App for Method:CRM Version 4.20

We've tried to list our major features here in a table so you can easily compare this to your needs or other software packages. We hope this helps make your selection process easy!

Feature	HWIT App 4.20	Your Comparison Column
Reporting Software based on your requirements	HWIT offers two integrated reporting options so that whatever your needs are they can be met. You have specific needs so why force them into a solution that may not cover your needs?	
Synchronized with QuickBooks	Fully synchronized two-way with QB; what you change in QB is changed in HWIT and what you change in HWIT is changed in QB. This is very important to assure that your data is always in sync and balances and that you don't have to make double entries.	
Uses QuickBooks for accounting	QB is known to be one of the best accounting programs so why try to duplicate it? An "all-in-one" solution can never have the same level of capabilities as a dedicated program.	
Scheduling your work	Schedules are automatically created and driven based on when customers come/go. You enter the customer's schedule (when they come/go) and the rest is automatically scheduled for you.	
Planning your Routes	You can manage routes by neighborhood, by day, and even optimize your driving directions.	
Customer scheduling	You can track who is coming/going through the customer schedule; customers can also enter and update their own schedules through the Customer Portal.	
Easy to modify scheduling	You can move schedules by a day, a week, or any number of days and adjust all future dates at the same time -- with 3 mouse clicks!	
Automatic Invoicing	Easy and one-click invoice creation, all invoices are created based on the work performed and synchronize directly to QuickBooks so that your books are always up to date for your accountant's review.	
Price Changes Management	Do you know when you raised/changed prices? The system keeps track of when each price change occurred as well as the old rate and new rate. You can change rates for any date in the future at any time without worry.	

Manage Open Tasks/Issues/Projects	There is an Issue Management App that allows you to track open items on a property and manage the work associated with it. Never lose track of the open tasks your clients want you to do. And, of course you can communicate about these tasks directly through the Customer Portal.	
Customer Portal	It's there and it's optional -- you are not required to use it if you don't want to. Customers can review their reports, see their upcoming schedule, manage when they are coming/going, and pay their invoices. You can also communicate with the client through the portal and these communications are logged in the system along with emails, phone calls, and other notes. You can even prompt your user to purchase additional services when they make portal entries.	
Vendor Portal	Vendors can also see their schedule (housekeepers, handyman, etc.) and update you when the work is complete. They can see bills and what you owe them.	
Vendor Bills	Enter vendor bills directly when you meet them to perform the service. Update what your client gets billed and the vendor bill is automatically posted to QuickBooks for tracking and payment purposes.	
Assign work to Employees or Vendors	Or both, such as when you go to meet a vendor and open the property for them.	
Prepayments handled easily	You can enter prepayments in QB or in HWIT (or both) -- as the systems are synchronized they will be in balance irrespective of where you enter things. In addition, as they are synchronized QB will always show the proper liability amount and automatically put revenue into the months where it belongs.	
Many integration points	The software is integrated with a number of packages already and can be integrated to something else if you have a special requirement. Currently it is integrated with iAuditor for reporting, Google for calendar/email/activity tracking, Outlook for email/activity tracking, MailChimp and QuickBooks of course.	
Built on a fully functional CRM system	If you want to connect it to your website; if you want to track all interactions with leads and customers alike; if you want to manage sales pipelines; all of this and more is available. The most popular CRM system for QuickBooks, it is used by thousands of users so you know it works!	
Field Technician App	Your field employees will only see what you want them to see. You can adjust what they see and when they see it. And of course, no financial info is shown to them unless you want to! Allow them to enter vendor bills, see who is in residence, add additional charges, or communicate directly with your clients -- configurable by employee.	
RBOs (eg AirBNB, Evolve, etc.)	Manage bookings, schedule housekeeping and inspections automatically; send welcome letters automatically -- everything you need to service your clients' rental properties. And you can provide that information to your client via the portal if you wish.	
Flexibility and Security	Lists and views of data can be configured by you;	

	<p>they can be easily exported as well. In addition, each of our client's data is in a separate database -- not shared like many cloud software providers. This means improved security!</p> <p>You can select your own credit card provider to find the best rates.</p>	
Calculate the Best Route	You can calculate the least-distance route for the properties you need to visit in a day easily and visually in the system. Cut down on excess mileage!	
Regular updates	We issue updates approximately every 6 months!	
Manage all Customer Data in One Place	<p>Don't bury your customer data into a checklist or use offline file storage -- keep everything in one location. Contracts, files, notes about what to do in the home, etc. are all stored in one easy-to-user place.</p> <p>But...if you do want to keep a cloud-based folder of information, we can link to it as well! In fact, we can even put the link on the customer portal for your customer to access if you want.</p>	
Scalable	We have clients running with over 400 properties and 8+ field technicians, fully synchronized with QuickBooks and Google Suite.	