

MOBILETECH

# Service Desk

macOS Quick Setup Guide

From installation to a ready-to-use service desk

Use this visual guide for the first setup. Gold numbered circles identify buttons to press. Teal outlines identify fields to review. The full User Manual explains daily workflows, reports, backups, subscriptions, and troubleshooting.

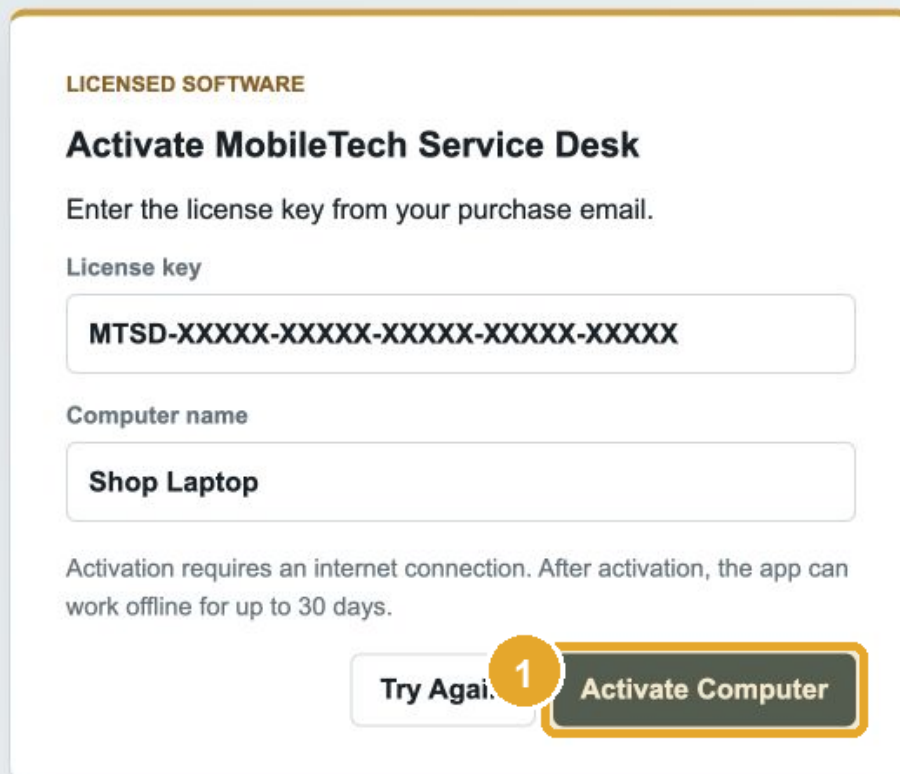
**Have ready:** your activation key, company contact information, labor rates, tax and payment defaults, preferred schedule hours, and a transparent-background company logo.

**Support:** [support@mobiletsd.com](mailto:support@mobiletsd.com)

# 1. Install and activate

Install **MobileTech-Service-Desk-macOS-universal.pkg** from MobileTSD.com or the approved purchase email. Open the downloaded package and follow the Installer prompts. If the temporary unnotarized-app warning appears, open **System Settings > Privacy & Security** and use **Open Anyway** only for the verified MobileTSD.com download.

Stop if the computer reports malware, a damaged file, or a source other than MobileTSD.com. Do not disable system security protections.



**LICENSED SOFTWARE**

## Activate MobileTech Service Desk

Enter the license key from your purchase email.

License key

MTSD-XXXXX-XXXXX-XXXXX-XXXXX

Computer name

Shop Laptop

Activation requires an internet connection. After activation, the app can work offline for up to 30 days.

Try Again **1** **Activate Computer**

1. Enter the license key and a recognizable computer name, then press **Activate Computer**. Internet access is required for activation.

One subscription activates one computer at a time. Keep the purchase email and activation key with your business records.

## 2. Open Settings

After activation, the dashboard opens. Complete Settings before entering live customers, quotes, work orders, or expenses.

The screenshot shows the MobileTech Service Desk dashboard. At the top, there's a header with the title "MobileTech Service Desk" and a "Settings" button with a "2" badge. Below the header is a navigation bar with tabs: Dashboard, Work Orders, Invoices, Quotes, Inventory, Expenses, Customers, CRM, and Reports. The main content area features six summary cards: Open jobs (1), Needs parts (0), Low stock (0), Past due PM (0), Past due invoices (0), and CRM reminders (0). Below these is a "5-Day Schedule" table with columns for Time, Sat, Aug 29 / Today, Sun, Aug 30, Mon, Aug 31, and Tue, Sep 1. Each time slot (8:00 AM - 9:00 AM, 9:00 AM - 10:00 AM, 10:00 AM - 11:00 AM, 11:00 AM - 12:00 PM) has a dropdown menu labeled "Assign job". To the right of the schedule is an "Inventory Alerts" section with a "Review" button and a message "Nothing here yet.". Below that is a "PM Due Soon" section with a "Customers" button and a message "No PM service due in the next 30 days."

| Time                | Sat, Aug 29 / Today | Sun, Aug 30 | Mon, Aug 31 | Tue, Sep 1 |
|---------------------|---------------------|-------------|-------------|------------|
| 8:00 AM - 9:00 AM   | Assign job          | Assign job  | Assign job  | Assign job |
| 9:00 AM - 10:00 AM  | Assign job          | Assign job  | Assign job  | Assign job |
| 10:00 AM - 11:00 AM | Assign job          | Assign job  | Assign job  | Assign job |
| 11:00 AM - 12:00 PM | Assign job          | Assign job  | Assign job  | Assign job |

2. Press **Settings** in the upper-right corner.

- Settings control branding, rates, scheduling, terminology, document numbering, backups, and update information.
- Defaults normally apply to new records; review existing records individually after changing a setting.

### 3. Set language, currency, and company details

**MobileTech Service Desk**

**APPLICATION PREFERENCES**  
**Settings**

**Language & Region**

Language & Region  
English

Choose the language used for menus, messages, reports, invoices, and quotes. Customer-entered information is never translated or changed.

**Company**

Company

Application name: MobileTech Service Desk  
Header description:  
Company name: Your Company  
Default technician:  
Phone:  
Email:

Restore Defaults Cancel Save Settings

- Choose the application language and local currency. Currency changes formatting only; it does not convert existing amounts.
- Enter the application name, company name, technician, phone, email, and mailing address exactly as customers should see them.
- Review one screen and one printed document after changing the language.

Customer-entered names, addresses, notes, and part descriptions remain exactly as typed and are not translated.

## 4. Enter billing defaults

The screenshot shows the 'MobileTech Service Desk' interface with a 'Billing Defaults' settings window open. The window is titled 'APPLICATION PREFERENCES Settings' and has a close button (X). It contains several input fields for contact information (Phone, Email) and a 'Mailing address for checks' field. Below these is a 'Billing Defaults' section with a blue header. This section includes fields for 'Currency' (set to 'USD — US Dollar'), 'Standard labor rate' (120.00), 'PM labor rate' (120.00), 'Shop labor rate' (120.00), 'Default parts markup %' (0), 'Sales tax %' (7), 'Payment terms' (NET 30), and 'Default quote validity (days)' (Leave blank for manual s). There is also a 'Customer fine print (optional)' field with an example text: 'Example: Final invoice totals may vary by up to 10% from the quoted price.' At the bottom of the window are three buttons: 'Restore Defaults', 'Cancel', and 'Save Settings'.

MobileTech Service Desk

Settings

Dashboard Work Order

Open jobs  
1

5-Day Schedule

| Time                | Sat, Aug 29 / |
|---------------------|---------------|
| 8:00 AM - 9:00 AM   | Assign job    |
| 9:00 AM - 10:00 AM  | Assign job    |
| 10:00 AM - 11:00 AM | Assign job    |
| 11:00 AM - 12:00 PM | Assign job    |

CRM Reports

CRM reminders  
0

Review

Customers

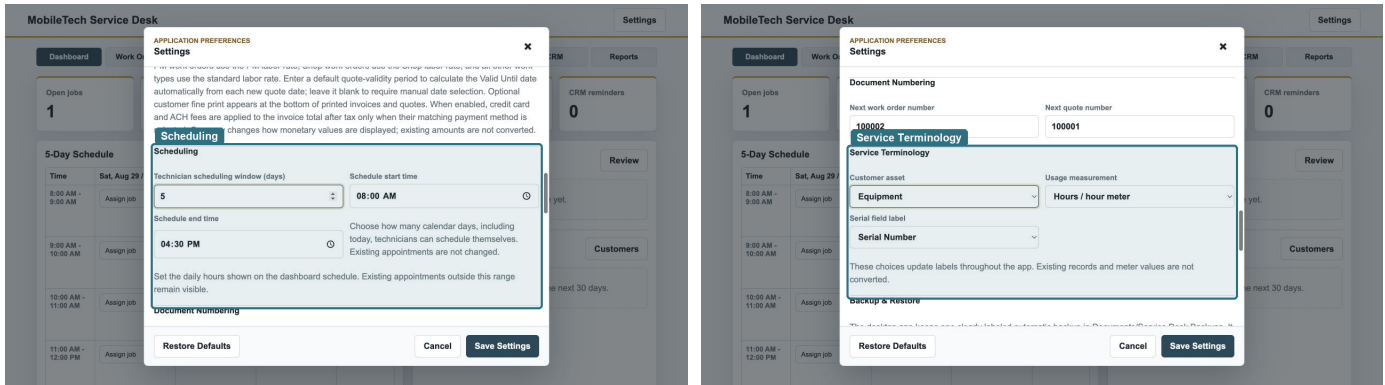
Example: Final invoice totals may vary by up to 10% from the quoted price.

Restore Defaults Cancel Save Settings

- Enter the standard service, PM, and shop labor rates.
- Set parts markup, sales tax, payment terms, trip charge, and shop-supplies defaults as needed.
- Enable card or ACH processing fees only if your agreements and local rules allow them.
- Optionally set default quote-validity days and customer fine-print notes.

Confirm tax, fee, and accounting treatment with a qualified professional for your location.

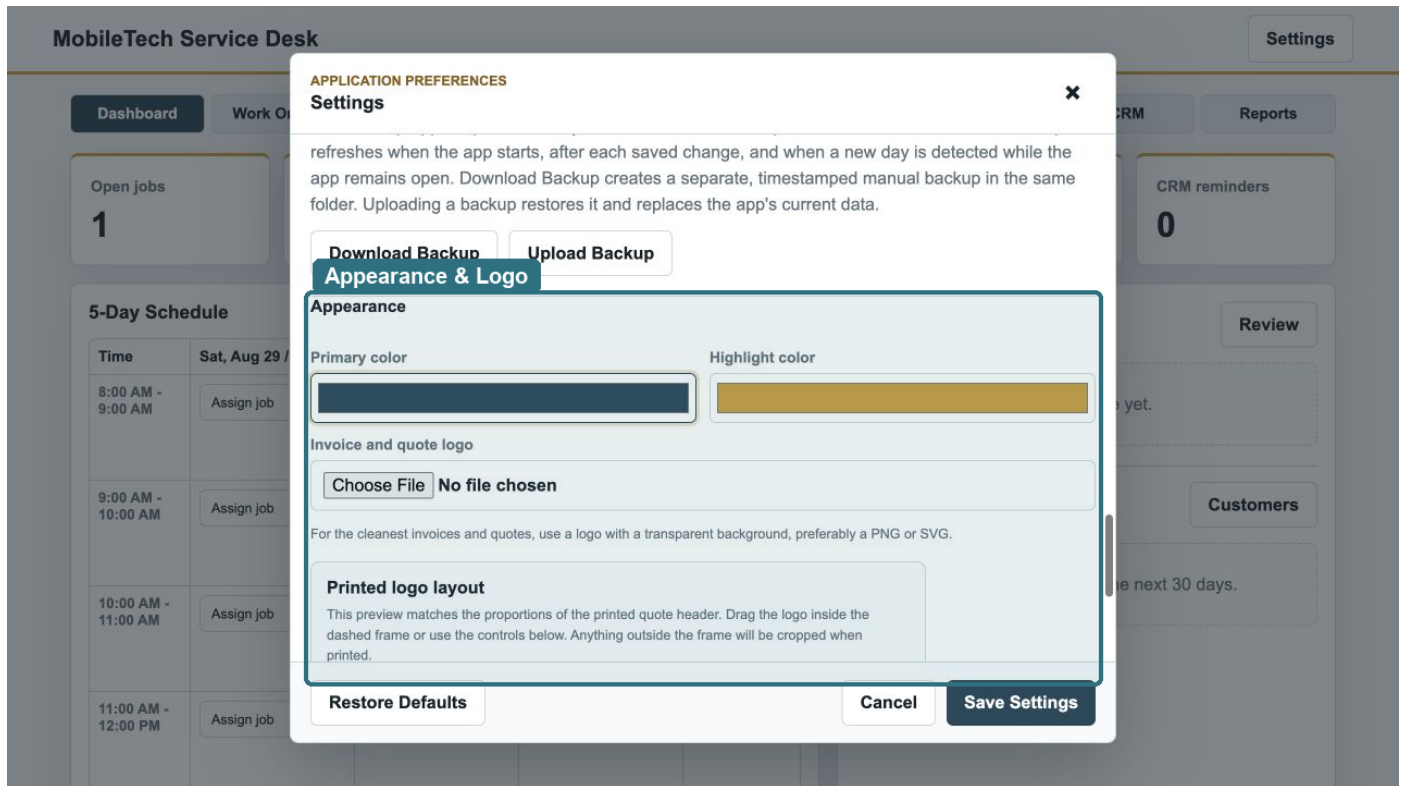
## 5. Set scheduling and service terminology



- Choose how many calendar days technicians may schedule themselves.
- Set the start and end times shown on the dashboard schedule. Existing appointments outside a changed range remain visible.
- Choose **Equipment** or **Vehicle**, **Hours** or **Miles**, and **Serial Number** or **VIN** to match your business.
- Check the next work-order and quote numbers before creating the first live record.

Vehicle terminology also exposes the vehicle Year field.

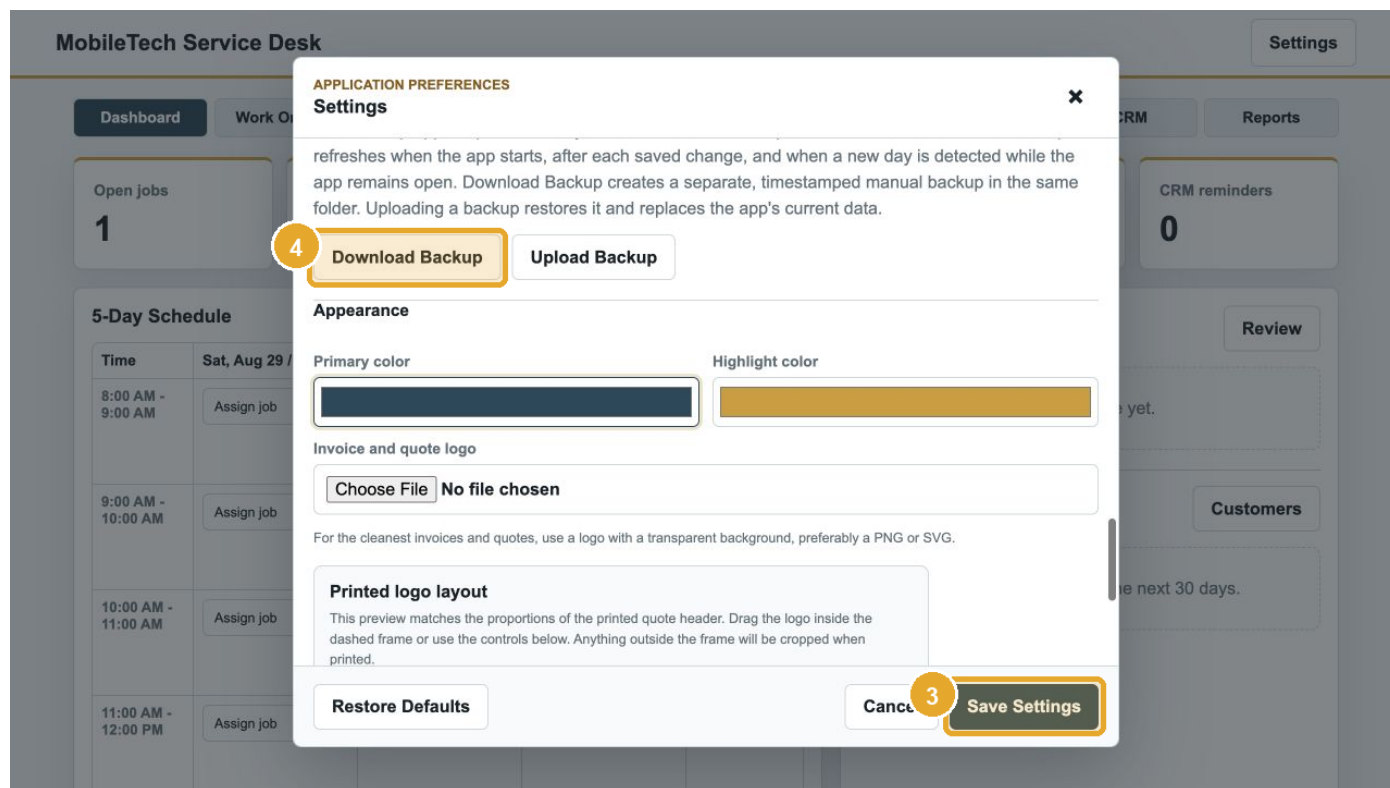
## 6. Add and adjust the company logo



- Upload a PNG, JPEG, WebP, or SVG logo. A transparent PNG or SVG usually prints most cleanly.
- Use the preview controls to adjust size and horizontal or vertical position without changing the original file.
- After saving, print one test quote and invoice. Confirm that the logo is centered as intended, readable, and not cropped.

If a logo has large blank margins inside the image file, crop those margins before uploading for the best result.

## 7. Save, back up, and verify



3. Press **Save Settings**. Reopen Settings once to confirm the company information and logo remained saved.

4. Press **Download Backup** and store the dated manual-backup JSON file somewhere protected, preferably on a second drive or approved cloud-storage folder.

**Ready-to-use check:** Create one sample customer, add one vehicle or piece of equipment, make a test quote or Quick Invoice, print it to PDF, and confirm totals, logo, company details, terminology, and currency.

For updates: make a manual backup, download the new installer, close MobileTech Service Desk, run the installer, and reopen the app. Use **Settings > Check for Updates** to see current and available versions.

For full instructions, open **MobileTech Service Desk User Manual.pdf** or contact [support@mobiletsd.com](mailto:support@mobiletsd.com).