

MOBILETECH

Service Desk

macOS Setup and User Manual

Version 1.0.17

A current guide to installation, activation, company setup, language preferences, scheduling, Quick Invoice, service workflows, customer and vehicle or equipment records, inventory, expenses, CRM, reports, subscriptions, and backups.

Support: support@mobiletsd.com

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1. Install, activate, and update

System requirements

macOS 12 or later on an Apple silicon or Intel Mac. The universal installer supports both processor types.

Internet access is required for initial activation, periodic subscription verification, license recovery, and update downloads. Daily operational records remain local on the computer.

Install safely

1. Download **MobileTech-Service-Desk-macOS-universal.pkg** only from MobileTSD.com or the approved purchase email.
2. Open the package and follow the Installer prompts. MobileTech Service Desk is installed in **Applications**, and the user manual is copied to **Documents** when the PKG installer is used.
3. During the temporary unnotarized period, if macOS blocks the expected package, try once, then open **System Settings > Privacy & Security** and use **Open Anyway** only for the verified MobileTech download.
4. Open **MobileTech Service Desk** from Applications.

Stop if macOS says the software contains malware, will damage the Mac, is corrupted, or has been modified. Do not turn off Gatekeeper or other protections.

Activate the subscription

1. Enter the activation key from the purchase email and a recognizable computer name.
2. Select **Activate Computer**. One subscription activates one computer at a time.
3. After successful activation, complete Settings before entering live records.

The app can work offline for up to 30 days, without extending beyond the paid access period. If a key was lost, use mobiletsd.com/recover-license.

Install an update

- The app checks about once per day. When a newer release is available, a banner shows the installed and available versions.
- Open **Settings > Software Updates** to see the current version, the last-check date and time, or to select **Check for Updates** manually.
- Before installing, make a manual backup. Then download the update, close MobileTech Service Desk, run the installer, and reopen the app.
- An update with the same application identity normally retains local data, but a verified backup is still required before every upgrade.

2. Complete Settings

Open **Settings** in the upper-right corner. Save after making changes. Defaults generally affect new records; verify existing quotes and work orders individually.

Language and regional settings

Setting or field	Purpose
Application language	Select English, Spanish, French, Portuguese, German, Russian, Italian, Dutch, or Polish. Menus, messages, reports, invoices, and quotes use the selected language.
Customer-entered information	Company names, contacts, addresses, service notes, part descriptions, and other entered records are preserved exactly as typed and are not translated.
Currency	Select a common local currency. USD is the default. Changing currency formats existing values but does not convert their amounts.

After changing the language, review one screen, report, invoice, and quote before using the app with customers.

Company and document identity

Setting or field	Purpose
Application name and description	The title and optional subtitle displayed in the app.
Company and technician	Company name used on documents and the technician suggested on new work.
Phone, email, and mailing address	Customer-facing contact and remittance information printed on invoices and quotes.
Primary and highlight colors	Brand colors used in the app and on printed documents.
Invoice and quote logo	PNG, JPEG, WebP, or SVG up to 20 MB. A transparent PNG or SVG usually prints most cleanly.

After uploading a logo, select **Save Settings** and print one test quote and invoice to verify size, contrast, and alignment.

Billing defaults

Setting or field	Purpose
Standard, PM, and Shop labor rates	The work type applies the matching default rate. Any repair line can still be adjusted.
Default parts markup %	When unit cost is entered for a new inventory or non-inventory part, the suggested sell price is calculated automatically.
Sales tax and payment terms	Defaults copied to new work orders and invoices. Confirm tax treatment with a qualified professional.
Shop supplies and trip charge	Preset amounts available from work-order and quote buttons.
Credit card and ACH fees	Optional percentage added after tax only when the matching payment method is selected.

Scheduling, numbering, and terminology

Setting or field	Purpose
Scheduling window	From 1 through 31 calendar days, including today, that a technician can schedule.
Daily schedule hours	Set the dashboard schedule start and end times in 30-minute increments. The default is 8:00 AM - 4:30 PM. Existing appointments outside a newly selected range remain visible.
Next work order and quote numbers	Starting values for new records. The app prevents reuse below existing numbers.
Equipment or Vehicle	Changes asset wording throughout forms, reports, and documents. Vehicle mode also shows a Year field.
Hours or Miles	Changes meter wording. Existing readings are not converted.
Serial Number or VIN	Changes the identifier label. Existing values are preserved.

3. Protect data and manage access

Where records are stored

The working database is stored locally in the current macOS user's private Application Support folder. Customer, service, invoice, inventory, expense, CRM, schedule, settings, signature, and logo data are not automatically synchronized to another device.

Use operating-system sign-in security, device encryption, supported system updates, and physical access controls. MobileTech does not replace those protections.

Automatic and manual backups

- The desktop app refreshes **MobileTech-Service-Desk-Automatic-Backup.json** in **Documents/Service Desk Backups** when it starts, after each successfully saved change, and when it detects a new day while remaining open. This is one rolling file that replaces the previous automatic copy.
- Each **Download Backup** action saves a separate timestamped **MobileTech-Service-Desk-Manual-Backup-...** JSON file in the same folder. Manual backups are not replaced by the automatic process.
- Automatic and manual copies stay on the same computer unless you move them. They do not protect against disk failure, theft, ransomware, or loss of the user account, so copy important manual backups to an encrypted off-device location.
- A backup includes operational records, settings, numbering, and the uploaded logo. Treat it as confidential business data.

Restore a backup

1. Download a fresh backup of the current data when possible.
2. Open **Settings > Backup & Restore** and select **Upload Backup**.
3. Choose a trusted MobileTech JSON backup and confirm replacement of current working data.
4. Immediately verify customers, assets, work orders, invoices, expenses, settings, and numbering.

Inactive subscription and read-only access

- If paid access ends, existing local records remain available to view, search, print, report, export, and manually back up.
- Creating, editing, deleting, scheduling, changing payment status, and other mutations remain disabled until the subscription is active again.
- Select **Reactivate** or **Check Again** after correcting billing. Use mobiletsd.com/manage-subscription for the Paddle customer portal.
- Deactivating a computer releases that activation; uninstalling the app does not cancel billing. Cancel through the subscription portal.

4. Dashboard and schedule

The Dashboard is the daily starting point. Summary cards and expandable lists highlight work requiring attention.

Setting or field	Purpose
Open jobs	Work orders not marked Complete.
Needs parts	Work orders currently marked Waiting on Parts.
Low stock	Inventory at or below its reorder point, excluding parts deliberately removed from dashboard alerts.
Past Due PM	Asset PM dates earlier than today, with a shortcut to create a PM work order.
Past Due Invoices	Unpaid invoice balances past their calculated payment-term due date.
CRM reminders	Open CRM activities with a follow-up date.

Use the schedule

- The schedule shows the number of days and daily start and end times selected in Settings.
- Assign an existing open work order to a slot, or create a customer appointment that can later become a work order.
- For someone who is not yet a saved customer, choose **Schedule guest customer...** from a time slot. Enter the company or customer name, contact details, address, asset, and service request.
- A guest appointment card can create a work order, create a Quick Invoice, save the person or company as a regular customer, or cancel only the appointment.
- Guest information is kept with the appointment and backup data but does not appear in the regular Customer list unless **Create Customer** is selected.
- Open scheduled work directly from its card. Use the appointment or work-order cancellation action to remove only the scheduled assignment.
- Creating or changing an appointment preserves the current schedule scroll position.

Use reminders

- Select an inventory alert to expand its details, then use the Inventory tab to adjust or reorder stock.
- Use **New PM order** from a due or overdue item. Completing PM work advances the next PM date when an interval is configured.
- Open past-due invoices to review or mark them paid. Open CRM reminders or mark completed activities Done.

5. Customers and equipment or vehicles

Create a customer

1. Enter company, primary contact, phone, email, billing contact, billing email, service address, and operational notes as needed.
2. Add the customer's equipment or vehicles before or after saving the customer.
3. Select **Save Customer**. Use Search, Edit, or Delete from the Records list as needed.

Add and maintain assets

Setting or field	Purpose
Year	Visible only when Vehicle terminology is selected.
Make and model	Manufacturer and model used in selectors and service history.
Serial Number or VIN	Identifier label follows the Settings selection.
Customer equipment or vehicle #	The customer's internal unit, fleet, or asset number.
PM interval and next PM	Controls upcoming and past-due PM reminders.

When editing an existing customer, selecting **Add Equipment** or **Add Vehicle** saves the new asset to that customer immediately. Use the asset list to edit or remove it.

Review repair history

Select **Equipment history** or **Vehicle history** from a customer card. The compact report summarizes each completed repair, meter reading, labor, technician, and parts without storing a second copy of the full invoice.

6. Inventory and parts

Create and price a part

1. Enter part name, part number, quantity, reorder point, unit cost, sell price, truck bin, and vendor.
2. When cost is entered, the configured markup suggests a sell price. Review the price before saving.
3. Check **Exclude this part from low-stock dashboard alerts** for intentionally non-stocked or special-order items.
4. Select **Save Part**. Sort the inventory list by part name or part number.

Each inventory row shows part number, part name, and quantity on one line. Select the row to expand reorder level, cost, sell price, bin, vendor, and alert details.

Use parts on work orders and quotes

- Selecting an inventory part fills description, part number, cost, and sell price. Confirm quantity and price before adding it.
- For a non-inventory part, enter both unit cost and sell price so parts-profit and month-end reports remain meaningful.
- Inventory quantities are reconciled when saved work-order part usage changes. Check physical stock regularly and use the -1 and +1 controls for corrections or receiving.
- Printed customer invoices and quotes show a summarized Parts line and do not print internal part numbers. Detailed cost and profit remain internal to reports.

7. Expenses

Record an expense

1. Select **Expenses** and enter the date, category, vendor, amount, and payment method.
2. Add a useful description and internal receipt, job, or reference notes.
3. Select **Save Expense**. Use Search, Edit, and Delete to maintain the list.

Available categories include Parts, Fuel, Tools, Software, Subcontractor, Supplies, Vehicle, Insurance, Office, and Other.

Use expense reporting

The Expenses report totals spending, categories, and largest expense for the selected dates. The Month-End Summary groups expense categories with paid invoices, parts cost and profit, processing fees, open receivables, and an estimated net figure.

MobileTech provides operational summaries, not a general ledger, bank reconciliation, payroll, accounts payable, or tax return. Export or enter the needed totals in your accounting system and consult a qualified professional.

8. Quotes

Build a quote using the repair-first workflow

1. Select the customer and saved asset, then enter quote date, valid-until date, and Draft or Sent status.
2. Create the first repair with title, status, labor hours, labor rate, and repair details, then select **Save Repair**.
3. After the repair is saved, add inventory or non-inventory parts specifically to that repair. Add shop supplies or trip charge where appropriate.
4. Use **Add Another Repair** for separate repair choices. Each repair can be Pending, Approved, or Declined so the customer can accept only selected work.
5. Add customer-facing notes and keep internal pricing or follow-up information in Internal notes. Save and print the quote.

Approve, decline, and archive

- Record decision by, decision date, customer PO, and decision notes or decline reason.
- Use **Approve + Work Order** to approve selected repair options, create a work order, and remove the quote from the active Quotes list.
- Use **Decline + Archive** to remove a declined quote from the active list without creating work.
- Both outcomes remain available in the Archived Quotes report with decision details and any generated work-order number.

Printed quotes summarize Parts and Labor rather than listing part numbers, and omit internal status and schedule lines. Always preview a customer copy before sending.

9. Work orders

Create and schedule work

1. Select the customer and saved asset, then enter the current meter value.
2. Choose status, work type, date, scheduled time, customer PO, customer work-order number, and payment terms.
3. Enter the complaint, work performed, labor, technician, parts, and any fixed charges.
4. Capture the customer signature and printed name when appropriate, then save before printing or completing the order.

Work types and labor rates

Available work types include Field, Shop, PM, Leaks, Tires, Avoidable, Rework, Electrical, Hydraulic, Brakes, Battery, Attachments, Safety, and Other. PM uses the PM labor-rate default, Shop uses the Shop rate, and other types use the Standard rate. Rates remain editable per repair.

Put multiple repairs on one work order

- Leave **Add Additional Repairs** unchecked for the standard single-repair form.
- Check it to add repairs for the same or different assets while keeping one work-order and invoice number.
- Each additional repair has its own asset, meter reading, work type, complaint, work performed, labor, rate, and parts list.

Completion and payment

- Use Complete only after service details, parts, labor, charges, signature, and customer references have been reviewed.
- Select Unpaid or Paid and record payment date and method. A check number appears for Check; configured processing fees apply to Credit Card or ACH.
- Completed work moves from Active Orders to the Invoices tab. Paid invoices are grouped separately from unpaid invoices.

10. Invoices and printing

Standard invoice workflow

1. Complete the associated work order, including customer, asset, labor, parts, charges, tax, payment terms, and payment details.
2. Open **Invoices** and search by customer or work-order information.
3. Select **Print** to print or save a PDF. Use Edit to correct the underlying work order and Mark Paid after funds are received.

Create a Quick Invoice

1. Open **Invoices** and select **Quick Invoice**.
2. Choose an existing customer or leave **One-time customer** selected and enter the company or customer name plus any needed phone, email, service address, and equipment or vehicle information.
3. Enter the date, complaint, work performed, labor hours and rate, and an optional non-inventory part with quantity, unit cost, and sell price.
4. Select payment status and method, and add configured shop supplies or trip charge when appropriate.
5. Check **Save as a regular customer** only when the one-time customer should be added to Customer records, then select **Save Quick Invoice**.

Quick Invoice uses normal work-order and invoice numbering, tax, configured payment fees, reports, printing, backups, and payment tracking. For inventory parts, multiple parts, additional repairs, signatures, or a detailed service workflow, create a standard work order instead.

Printed invoice and quote format

- Parts are combined into one Parts line and labor into one Labor line, followed by subtotal, tax, any payment processing fee, and total.
- Individual part numbers and internal unit costs do not print on the customer document.
- Scheduled and Status lines are omitted from printed invoices and quotes.
- Company name, contact details, remittance address, colors, logo, and terms come from Settings. Logos remain proportionally scaled in the original left-side position.

Before sending, confirm customer and billing contact, customer PO and reference number, asset and meter, service description, totals, payment terms, and that private notes are not in customer-facing fields.

Printing troubleshooting

- Use the app's Print button, not a browser-style print command from another screen.
- In the system print dialog, use Letter paper and 100% or Fit to printable area if the printer clips borders.
- If a blank page appears, close the dialog, reopen the saved record, and print again. Reports must be printed from the Reports tab.

11. CRM

Manage potential customers

1. Create a Potential Customer with company, contact, phone, email, status, and notes. Follow-up dates are added through CRM activities after the prospect exists.
2. Use New activity to record calls, emails, visits, follow-ups, leads, and notes with status and priority.
3. Review each prospect's activity history. Convert a won prospect to a Customer, then complete service, billing, and asset information.

Track customer and prospect activity

- An activity can belong to an existing Customer or Potential Customer.
- Open activities with follow-up dates appear as Dashboard reminders. Mark completed activity Done and create another activity when a new follow-up is required.
- Use Edit and Delete carefully; delete confirmations identify the record type and cannot be undone without restoring a backup.

12. Reports

Choose a report, set any applicable start date, end date, customer, or asset filters, and review both the summary cards and table.

Setting or field	Purpose
Open Work Orders	Open job status, work type, totals, waiting-parts count, and PM count.
Unpaid Invoices and Invoice Aging	Open balances plus 0-30, 31-60, 61-90, and 90+ day aging.
PM Due	Upcoming and overdue PM service by customer and asset.
Inventory Reorder List	Low-stock items excluding parts removed from alerts, plus inventory and reorder values.
Revenue	Paid invoices, subtotal, tax, processing fees, total paid, balances, and average invoice.
Parts Revenue	Quantity sold, cost, revenue, profit, and margin by part.
Expenses	Expense detail and totals by category.
Month-End Summary	Paid billing, tax, fees, receivables, parts profit, expenses, and estimated net.
Customer Report	Customers, asset count, work orders, quotes, revenue, balance, and last service.
Equipment or Vehicle Repair History	Compact completed-repair history by customer and asset.
Inventory Usage	Parts quantity, cost, billed amount, and profit across work orders.
Quote and Archived Quotes	Active quote outcomes and archived approved or declined decisions.
Payment Report	Payment date, method, check number, paid amount, and balance.

Export and print

- Select **Export CSV** to save the current report data for a spreadsheet or accounting workflow.
- Select **Print** from the Reports tab to print the report or save it as a PDF. Report printing uses its own report layout, not an invoice layout.
- Clear or change filters if results appear incomplete. Reports that use transaction dates respect the selected date range.

13. Subscription, support, and troubleshooting

Manage the subscription

- Open **mobiletsd.com/manage-subscription** to access Paddle billing, update the payment method, or cancel future renewal.
- Use Settings > Software License to review the masked key, customer, computer, and offline-access date, or to deactivate this computer before moving the license.
- Uninstalling, deleting local data, or no longer using the app does not cancel billing.

Troubleshooting checklist

1. Make a current manual backup before changing or reinstalling software whenever the app is usable.
2. Note the MobileTech version shown in the top window area and the operating-system version.
3. Repeat the exact action and record the expected and actual result.
4. Restart the app. If activation or updates are involved, confirm internet access and select Check Again.
5. Email **support@mobiletsd.com** with the version, steps, and redacted screenshots. Never email live passwords, payment details, or an unprotected full backup.

Uninstall

Quit the app and move it from Applications to the Trash. Removing the app may leave its private Application Support data to protect against accidental record loss.

Export and verify a manual backup before deleting any residual application-data folder. Removing residual data is permanent and separate from canceling the subscription.

The PKG installer copies this PDF to the current user's Documents folder and also includes it in the application resources.

14. Operating checklist

Daily

- Review schedule, open work, waiting-parts jobs, PM due and past due, invoice reminders, low stock, and CRM reminders.
- Update complaints, work performed, parts, labor, status, payment information, and customer signatures before closing each job.
- Create a manual backup after material work sessions or before a risky change.

Weekly

- Review unpaid invoices, invoice aging, inventory reorder needs, PM schedules, CRM follow-ups, and expenses.
- Reconcile important physical inventory and confirm custom parts include unit cost for profit reporting.
- Copy at least one recent backup to an encrypted location outside this computer.

Monthly

- Review Month-End Summary, Revenue, Parts Revenue, Expenses, Payments, and Archived Quotes.
- Provide needed exports to the accounting system or accountant and reconcile against bank and merchant records outside MobileTech.
- Test a restore on a non-production user account or test computer, then verify the data.
- Review language, rates, markup, tax, fees, terms, contact information, logo, numbering, scheduling window, daily schedule hours, terminology, and software updates.

Documentation status

This manual describes MobileTech Service Desk version 1.0.17 for macOS. Screens and options can change in later releases. Current installation and support information is available at **MobileTSD.com**.