



Klipboard- Key Functionality Summarised

This document summarises the features and functions available within Klipboard.

Klipboard is field service management software that provides support for businesses who perform service jobs, project and maintenance management. Klipboard is available on a SaaS basis and can be licenced under a selected plan. Each plan provides access to a set of the Klipboard features, as listed below:

Job Management

	Starter	Innovator	Professional
Job creation	✓	✓	✓
Job status dashboard	✓	✓	✓
Job history, search and advanced filtering	✓	✓	✓
Recurring job management	✗	✓	✓
Job PDF documents notes and images	✗	✓	✓
Job reports	✗	✗	✓

Client & Supplier Management

	Starter	Innovator	Professional
Client management	✓	✓	✓
Add contacts, reminders, PDF documents and notes	✓	✓	✓
Client history and search	✓	✓	✓
Automated Client job confirmations	✓	✓	✓
Supplier history and search	✗	✓	✓
Supplier management	✗	✓	✓
Add sites and locations	✗	✓	✓
Automated Client feedback survey	✗	✓	✓
Automated Client servicing reminders	✗	✗	✓

Scheduling & Planning	Starter	Innovator	Professional
Drag and drop and dispatch	✓	✓	✓
Timeline view (Day, Week, Month)	✓	✓	✓
Events (sickness, holiday etc)	✗	✓	✓
Live GPS map tracking	✗	✗	✓
Allocate a job to multiple field team members	✗	✗	✓
Skills Categories & Advanced filtering	✗	✗	✓

Mobile Workflow Forms & PDF Template Designer	Starter	Innovator	Professional
Template Job form	✓	✓	✓
Forms library and industry templates	✗	✓	✓
Complete forms offline via the Klipboard mobile app	✗	✓	✓
Drag and drop custom form builder	✗	✗	✓
Pre-populated form fields	✗	✗	✓
Spell check and voice dictation	✗	✗	✓
Drag and drop PDF template designer	✗	✗	✓
Design PDF output of your custom form	✗	✗	✓

Asset Management, Planned Maintenance & Contracts	Starter	Innovator	Professional
Asset Register & QR Code Tagging	✗	✗	✓
Customisable Asset Register Templates	✗	✗	✓
Asset History, Photos, Documents & Contact	✗	✗	✓
Automated Customisable Asset Servicing Reminders	✗	✗	✓
Planned Maintenance Scheduler	✗	✗	✓
Planned Maintenance Dashboard	✗	✗	✓
Create Client Contracts	✗	✗	✓
Contracts Management Dashboard	✗	✗	✓

Quotes, Invoices & Purchase Orders	Starter	Innovator	Professional
Send quotes, invoices and purchase orders with your brand	✗	✓	✓
Convert quotes to purchase orders	✗	✓	✓
Convert quotes to jobs	✗	✓	✓
Monitor costs and job margins	✗	✓	✓

One click job to invoice	✗	✗	✓
Attach additional PDF documents when sending	✗	✗	✓
Select products or service items from inventory for quick creation	✗	✗	✓
Add products delivered from purchase orders to your inventory	✗	✗	✓
Monitor inventory allocation and stock levels			

Inventory Management	Starter	Innovator	Professional
Import products catalogue	✗	✗	✓
Set stock level alert	✗	✗	✓
Monitor actual vs allocated stock levels	✗	✗	✓
Create multiple inventory stock locations	✗	✗	✓
Allocate and track products parts	✗	✗	✓
Export excel reports	✗	✗	✓

Field Team Mobile App	Starter	Innovator	Professional
Native iOS and Android mobile apps	✓	✓	✓
Works offline	✓	✓	✓
Capture photos, notes and signatures	✓	✓	✓
View job history & job documents	✓	✓	✓
Job routing	✓	✓	✓
Notifications	✓	✓	✓
Schedule and dispatch jobs	✓	✓	✓
Create Quotes	✗	✓	✓
Create Invoices	✗	✓	✓
Accept Credit Card Payment	✗	✓	✓
Live GPS Tracking & Status Updates	✗	✗	✓
Siri and Google voice dictation	✗	✗	✓
Complete multiple custom workflow forms	✗	✗	✓
Asset management and asset creation	✗	✗	✓
Inventory management and creation	✗	✗	✓
Record job and travel time tracking	✗	✗	✓

Software Factsheet

Client Communications

	Starter	Innovator	Professional
Automated client SMS text alerts and reminder	✗	✓	✓
Client follow up emails and feedback surveys	✗	✓	✓
Client portal	✗	✗	✓
Client quote acceptance	✗	✗	✓
Client work requests	✗	✗	✓
Automated client email alerts and reminders	✗	✗	✓

Live Tracking & Timesheets

	Starter	Innovator	Professional
GPS real time tracking	✗	✗	✓
Live job status updates	✗	✗	✓
Record travel and job time	✗	✗	✓
Automatically invoice travel and job time	✗	✗	✓
Timesheet management dashboard	✗	✗	✓
Download timesheet data via excel	✗	✗	✓

Management & Team

	Starter	Innovator	Professional
Operational dashboards	✓	✓	✓
Company branding	✓	✓	✓
Finance and performance dashboard	✗	✓	✓
Planned servicing dashboard	✗	✓	✓
Team roles and permissions	✗	✓	✓
Payments, taxes and rates	✗	✓	✓
Excel reports	✗	✗	✓
Team notifications management	✗	✗	✓
Custom categories	✗	✗	✓

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Contact Kerridge Commercial Systems SA

Tel: +27 (0) 11 707 3333

marketing@k8.co.za

www.kerridgecs.co.za