

— OPERATING MODEL + CUSTOM SOFTWARE · SERVICEM8 CASE STUDY

We make ServiceM8 do what it *can't* *do* out of the box.

How we extended ServiceM8 for Tom's Pest Control with three custom-built add-ons, and how we design software around the way a business actually runs, not off the shelf.

SMS DASHBOARD

PROXIMITY SCHEDULER

CLIENTCONNECT PORTAL

— WHY INFINIKEY CONSULTING

Software is where we finish, not where we *start*.

Infinikey Consulting is an operating-model and process-improvement consultancy. Before we build anything, we work out how your business should actually run, then build the software that makes it run that way, whether that is a ServiceM8 add-on, a custom app, an integration or an AI workflow. Tailored to your business, never off-the-shelf.

01

Understand the business

We map how your business really works, and where time, margin and admin are quietly leaking.

02

Design the right process

We design the best way for your business to run, the right process, not a generic template dropped on top.

03

Build the software that fits

Then we build what fits, ServiceM8 add-ons, custom apps, automation or AI, that lock that better way of working in.

Most developers start at step three. *That is why so much custom software never quite pays off.*

— THE CLIENT

A national pest control business, already on *ServiceM8*.

Tom's Pest Control runs a multi-technician operation across seven Australian cities, Melbourne, Sydney, Brisbane, Perth, Adelaide, Canberra and the Gold Coast, all on ServiceM8. With 800+ five-star reviews across residential and commercial work, the platform handled the fundamentals well. But as the business scaled nationally, three everyday things kept costing time and money that ServiceM8 alone couldn't fix.

- **Two years working together.** We know their operation from the inside, not from a brief.
- **Fit-for-purpose, not off-the-shelf.** Each add-on was built for a specific gap in how the work flowed.
- **Built on ServiceM8, not around it.** Everything reads and writes live ServiceM8 data.

GAP 01

Manual updates &
SMS cost

GAP 02

Dispatch & drive
time

GAP 03

Admin & client
comms

— WHERE SERVICEM8 STOPPED SHORT

Three everyday jobs the platform couldn't *finish*.

01

SMS was automated, but expensive

Messaging already ran automatically inside ServiceM8. The problem was the bill: SMS is charged per message beyond plan allowances, and national volume made it climb fast.

The cost: thousands of dollars a month, every month.

02

Dispatch was guesswork

Allocating jobs across cities meant eyeballing who might be near and free. Wrong calls meant wasted travel and slower days.

The cost: kilometres and hours, every single day.

03

The office was the bottleneck

Customers rang for invoices, past service history, documents and job status. Every question became a phone call and an admin task.

The cost: admin that grows with every new customer.

These are not ServiceM8 faults. They are the point where a good platform meets a business that has outgrown its defaults, exactly where the right custom software pays for itself.

— ADD-ON 01 · THE FLAGSHIP · COST AND AUTOMATION

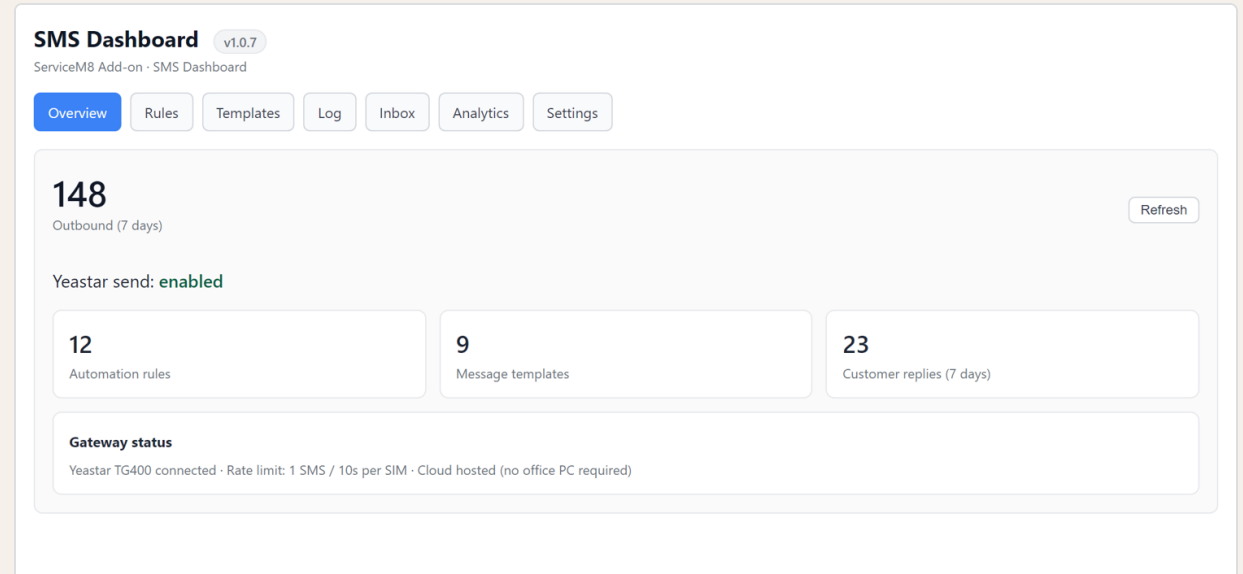
SMS *Dashboard.*

~\$5,000 / month

SAVED ON SMS COSTS, EVERY MONTH

Tom's Pest Control already had SMS running automatically inside ServiceM8. The issue was never effort, it was the bill. Messaging is charged per message beyond plan allowances, around 10c each, and at national volume that ran into thousands every month. We did two things at once: rebuilt the automation to be smarter about what sends and when, and moved delivery onto the business's own Yeastar gateway and SIM. Better messaging, roughly \$5,000 a month back.

- **Not just a cheaper pipe.** We rebuilt the automation rules and templates, so the right message fires on the right job event.
- **Two-way inbox** matches customer replies back to the right job by number.
- **Your own numbers and SIMs** via a Yeastar gateway, not a shared SaaS sender.



LIVE ADD-ON: SMS OVERVIEW, AUTOMATION STATUS AND VOLUME

SMS DASHBOARD · AUTOMATE AND REPLY

Automatic updates out, customer replies *in*.

SMS Dashboard v1.0.7
ServiceM8 Add-on · SMS Dashboard

Overview
Rules
Templates
Log
Inbox
Analytics
Settings

Automation rules
Choose when to send SMS and which template to use.

+ Add rule

Rule name	When	Status match	Template	On
Booking confirmed	Job created	—	booking_confirmed	Yes
Technician on the way	Technician en route	En Route, Dispatched	en_route	Yes
Job completed thank you	Job completed	Completed	job_complete	Yes
Quote follow-up	Status changed	Quote	quote_followup	Yes

When: Job created · Status changed · En route · Job completed

Save rules

AUTOMATION RULES: THE RIGHT TEMPLATE FIRES ON THE RIGHT JOB EVENT

SMS Dashboard v1.0.7
ServiceM8 Add-on · SMS Dashboard

Overview
Rules
Templates
Log
Inbox
Analytics
Settings

Inbox
Numbers on the left · full conversation on the right

Refresh

CONVERSATIONS

0412 345 678
IN Yes thank you, gate code is 4521
10:42 am

0487 221 009
OUT Hi Jane, our technician is on the way...
Yesterday

0433 998 110
IN Can we reschedule to Thursday?
Mon

0412 345 678
Matched to job J-1042 · Jane Smith

Hi Jane, our technician is en route to 12 Oak St for job J-1042. ETA ~20 mins.
Sent · Today 10:18 am

Yes thank you, gate code is 4521
Received · Today 10:42 am

TWO-WAY INBOX: REPLIES MATCHED TO THE RIGHT JOB, FULL DELIVERY LOG

Booking confirmations, en-route alerts and completion messages send themselves on job events, while manual send is one click from any job. Replies come straight back into a matched inbox, so the whole conversation stays tied to the work, and none of it depends on an office PC being left on.

INFINIKEY CONSULTING · OPERATING MODEL + CUSTOM SOFTWARE

CONFIDENTIAL · PREPARED FOR A PRIVATE CLIENT PRESENTATION

ADD-ON 02 · DISPATCH & DRIVE TIME

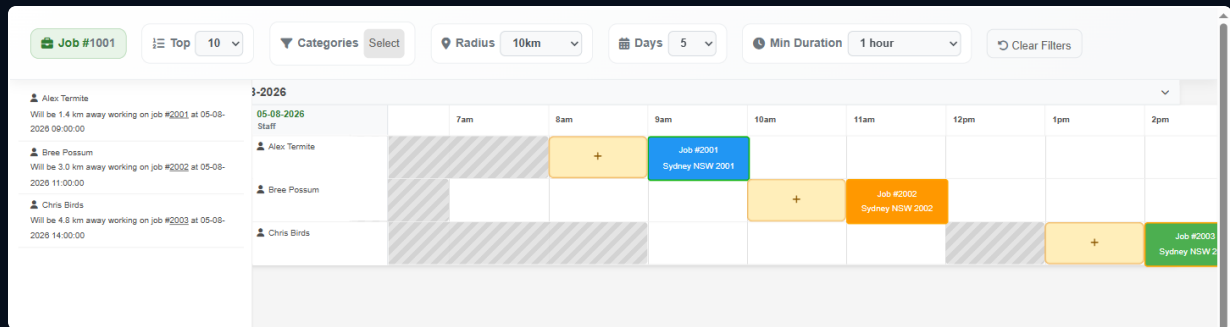
Proximity *Scheduler*.

20–40%

MORE JOBS ALLOCATED · EARLY ESTIMATE

Opens from any ServiceM8 job card and turns dispatch into a distance-aware decision. It ranks technicians by real road distance against their live schedule and leave, then allocates into a suggested slot in one click, written straight back into ServiceM8. Early estimates point to 20–40% more jobs allocated through tighter, smarter scheduling.

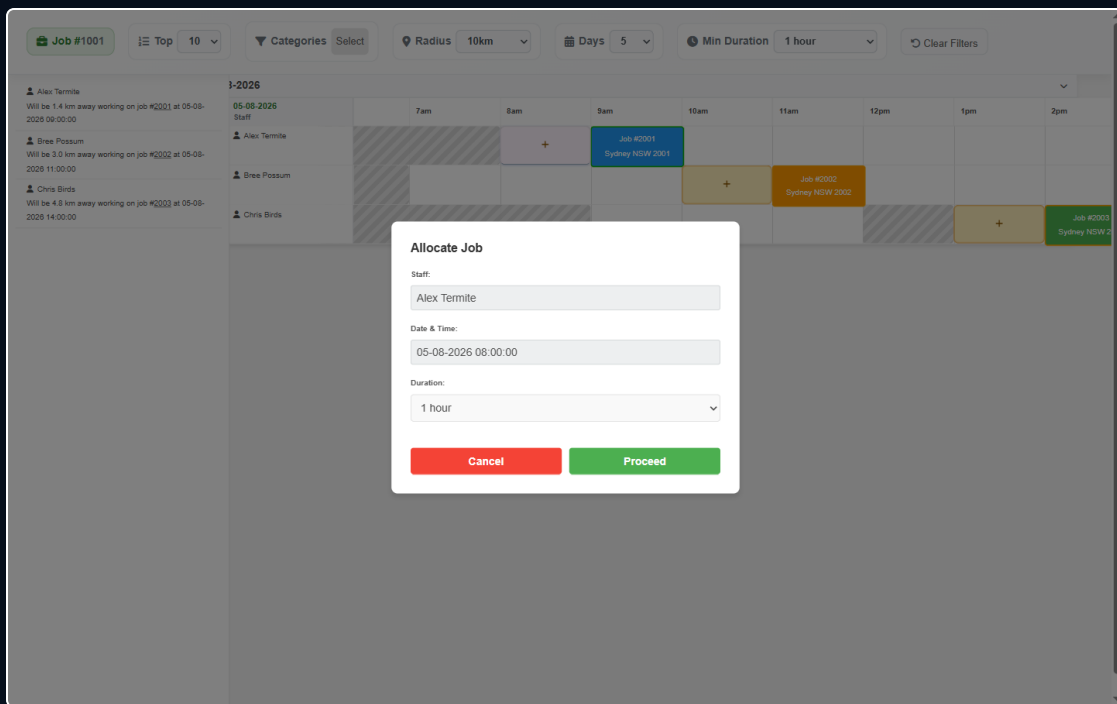
- **Road-distance ranking** using Google Routes, so closest means less actual driving.
- **Leave-aware schedule grid** so you never offer an unavailable slot.
- **One-click allocate** writes the appointment back into ServiceM8 instantly.



LIVE ADD-ON: TECHNICIANS RANKED BY ROAD DISTANCE WITH SCHEDULE GRID

PROXIMITY SCHEDULER · IN USE

Pick the closest free tech, and *book them*.



ALLOCATION VIEW: SUGGESTED SLOTS SIZED TO THE JOB, NEXT TO NEARBY WORK

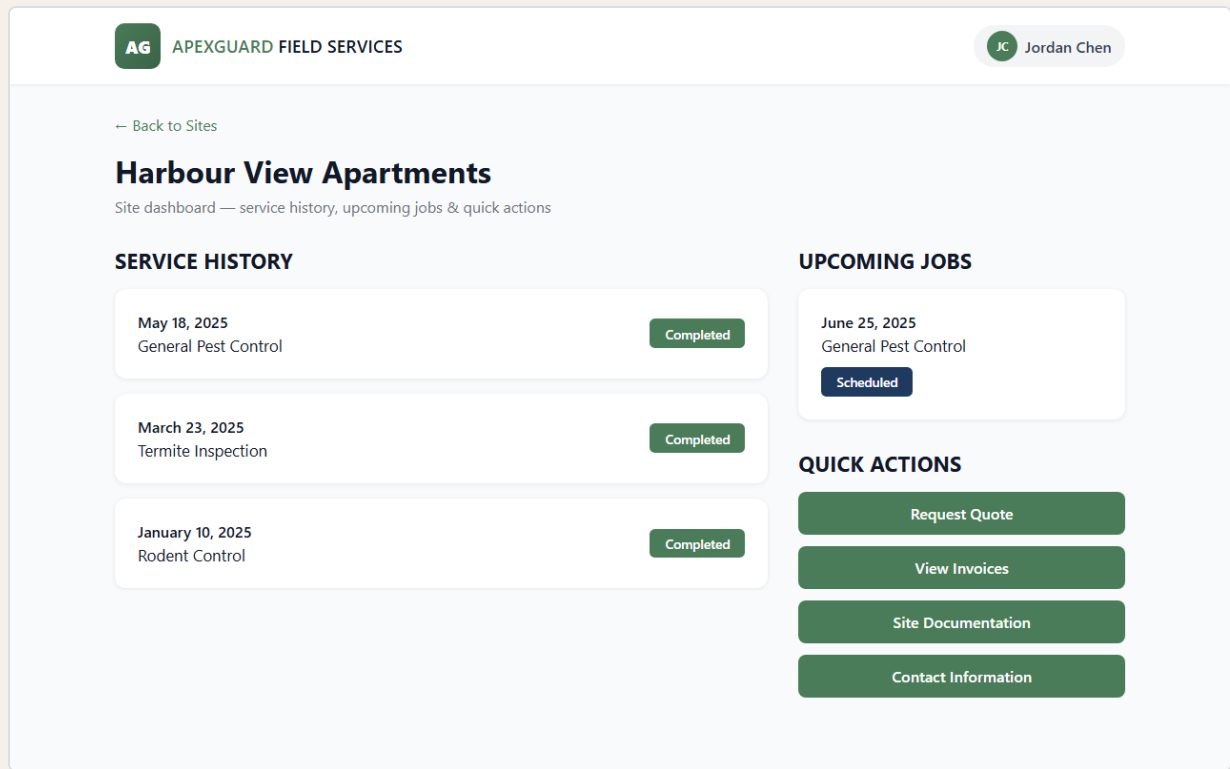
- **See the impact before you commit.** Each technician shows how far they'll be from the new job based on their nearby work.
- **Suggested slots** are sized to the job duration and favour times next to existing jobs, tightening the route automatically.
- **Fewer mistakes under pressure.** On a busy morning, allocation that meant flipping between calendars becomes filter, pick, done.
- **Built for multi-city teams** who feel every extra kilometre of windscreen time.

IDEAL FOR PEST, TRADES AND ANY MULTI-TECH FIELD TEAM

ClientConnect *Portal*.

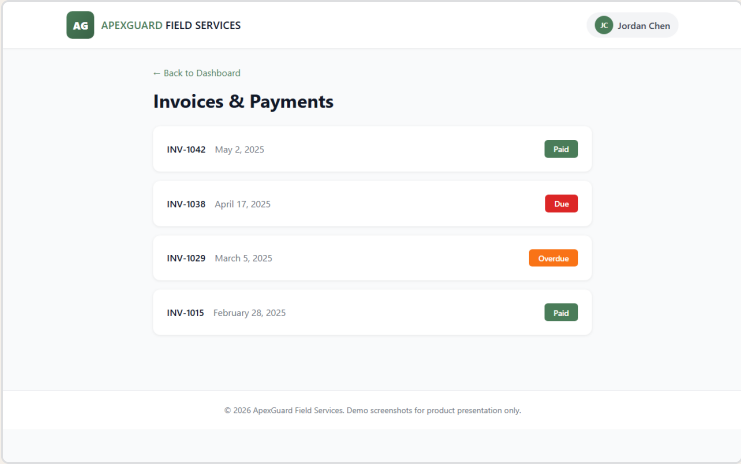
A branded, white-label self-service portal wired live to ServiceM8. Customers manage their own service relationship online, while staff run a back office over live ServiceM8 data. The routine questions that used to tie up the office become self-serve.

- **Multi-site customers** pick the location they need and see its full history.
- **Invoices with Paid / Due / Overdue** status, downloadable any time.
- **Service history and upcoming jobs** pulled live from ServiceM8.
- **Document library** for site docs plus public licences, SDS and accreditations.

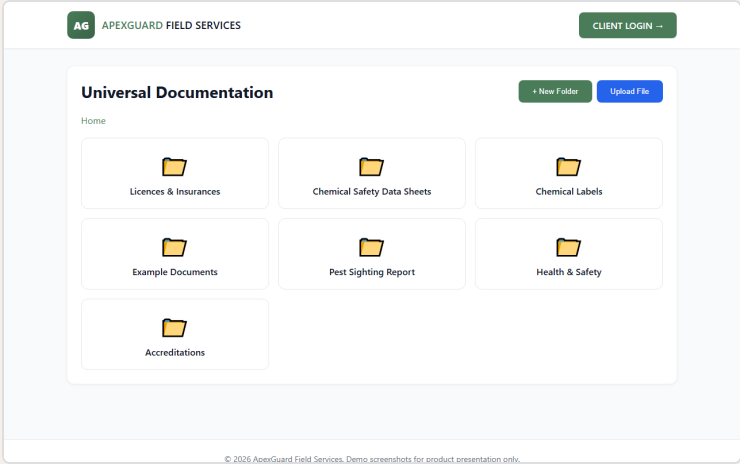


LIVE ADD-ON: CUSTOMER SITE DASHBOARD, HISTORY AND UPCOMING JOBS

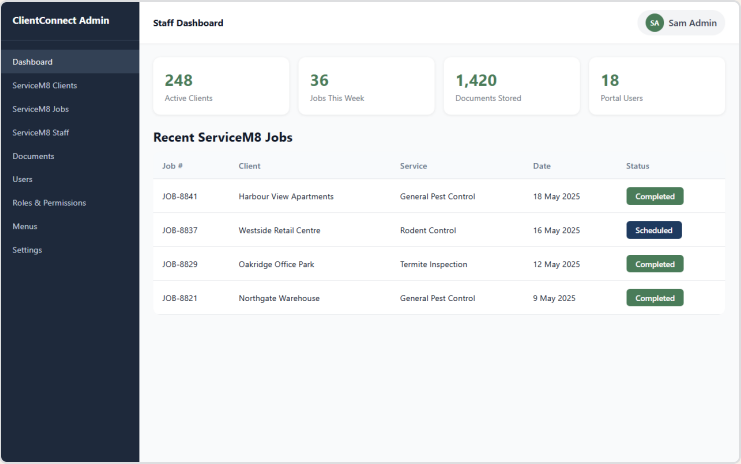
CLIENTCONNECT PORTAL · WHAT CUSTOMERS AND STAFF SEE



CUSTOMER VIEW: INVOICES WITH PAID / DUE / OVERDUE



CUSTOMER VIEW: SITE AND UNIVERSAL DOCUMENT LIBRARY

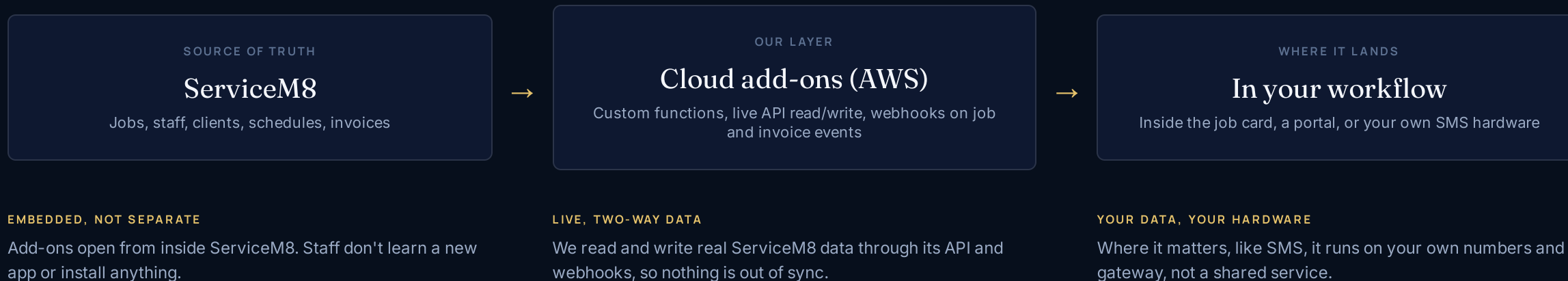


STAFF BACK OFFICE: LIVE SERVICEM8 CLIENTS, JOBS AND USERS

One portal, three audiences: customers self-serve, staff manage from a permission-gated back office over live ServiceM8 data, and public visitors can browse universal documentation. Fully white-label, brandable to any field-service business.

— HOW IT CONNECTS TO SERVICEM8

Real integration, not a *bolt-on*.



— THE PART MOST PEOPLE MISS

The software worked because it was aimed at the *right gaps*.

Plenty of businesses buy add-ons that never quite pay off, because they automate a step that shouldn't exist, or polish a process that's broken underneath. These landed because we started by understanding how Tom's Pest Control actually runs, then built only where it was genuinely leaking.

That's the difference between buying software and fixing the business. The build is the easy part. Knowing exactly what to build is the work, and it's what makes the spend worth it.

OUR APPROACH IN ONE LINE

Find the gaps first. *Then build what fits.*

- We map how work really flows, booking to payment.
- We rank where time, margin and admin are leaking.
- We build the software that seals the biggest gaps first.

— END TO END, WITH YOU THE WHOLE WAY

From finding the gap to your team *using it.*

Every engagement runs our four-phase methodology. Nothing gets built before we understand the work, and nothing is finished until your team is actually using it.

01 Diagnose

2-4 WEEKS

We sit with the people doing the work, map how work really flows today, and find where time, margin and admin are actually leaking.

YOU GET

Process map and ranked gaps

02 Redesign

JOINT WORKING

We design the better way the business should run, then spec the software against that process, so what gets built supports the right way of working.

YOU GET

Designed process and build spec

03 Implement

BUILD AND ROLL OUT

We build it, wire it live into ServiceM8 and your wider systems, test it on real work, then roll it out and train your team on it.

YOU GET

Working software, in your team's hands

04 Hold

AFTER GO-LIVE

Most consulting and development stops at handover. We stay, with structured check-ins, until the new way of working is genuinely how the business operates.

YOU GET

Adoption that lasts

Most developers hand over the code and disappear. *Hold is the phase that makes the spend actually pay off.*

WHAT WE CAN BUILD FOR YOU

Proven products, or built *from scratch*.

START FROM WHAT'S PROVEN

SMS Dashboard, Proximity Scheduler and ClientConnect Portal are real, working add-ons. We adapt them to your trade, workflow and branding, faster and lower-risk than starting from zero.

OR BUILD FULLY BESPOKE

Every business leaks in different places. Where you need something new, integrations, automations, AI, reporting, custom job flows, we design and build it against your actual requirements.

SERVICEM8, OR BEYOND IT

We are not a single-platform shop. Whether the right answer is a ServiceM8 add-on or a custom solution across your wider systems, we build what fits your business.

PROCESS FIRST, SENIOR-LED

We design the process, then build the software. The people who scope your work deliver it. No juniors, no offshoring, no learning on your project.

— LET'S FIND YOUR GAPS

See what the right software could do for *your business*.

We start with a short, senior-led look at how work flows through your business and where it's leaking, then show you exactly what to build first. You get a clear plan, whether we build it or you do.

BOOK A DISCOVERY CALL →

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