How AI sees Cedar Desk

Cedar Desk

Field-service software | November 2026

AI leaves Cedar Desk out of most software suggestions. When it does compare the brand with other options, price and setup often need a better explanation.

19.8%	14%	35/100
Answers that mention Cedar Desk or link to its website	Answers that link to its website	Score for how AI talks about the price

What we found

When people ask AI which software to use, how often does Cedar Desk come up?

How to read the numbers

How often the brand comes up

19.8% means Cedar Desk or its website appears in about 1 out of every 5 answers to questions asking for software suggestions.

How often the website gets a link

14% of those answers link to the website. An answer can both mention the brand and include a link.

What the scores mean

Scores run from 0 to 100. A lower score means AI talks more negatively about Cedar Desk. A higher score means it talks more positively. The price score of 35/100 shows that cost often comes up as a drawback.

Show how the software works, then answer the buying questions.

Cedar Desk appears in 7.5% of answers about online booking and 5% about repeat service visits. Buyers then need help comparing the price, understanding the contract and planning the move from another tool.

Where does Cedar Desk show up?

How often each AI tool mentions Cedar Desk or links to its website when asked for software suggestions.

AI tool	Answers including the brand or website
ChatGPT	1.0%
Google	11.0%
Perplexity	41.0%
Claude	26.0%

Where does AI leave Cedar Desk out?

What the buyer needs	ChatGPT	Google	Perplexity	Claude
Choosing a first tool	0%	0%	70%	70%
Taking bookings online	0%	0%	30%	0%
Managing jobs on site	0%	0%	50%	10%
Sharing jobs with the office	0%	10%	20%	0%
Comparing software costs	0%	50%	50%	70%
Moving from another tool	0%	0%	50%	30%
Managing several crews	10%	20%	60%	40%
Planning repeat visits	0%	0%	20%	0%
Sending quotes and invoices	0%	10%	30%	10%
Getting help	0%	20%	30%	30%

Each percentage shows how often Cedar Desk or its website appears in answers about that task. We also asked about alternatives to specific competitors. Cedar Desk or its website appears in 16.9% of those answers. We keep that result separate because the question already puts a competitor in the picture.

The three steps before buying

Finding options	Comparing choices	Deciding whether to buy
Left out of most software suggestions; Rarely mentioned for booking or repeat visits; Competitors come up more often.	Price often sounds like a drawback; Repeat visits and billing need explaining; Setup can sound harder than it needs to.	Small teams need to know if it suits them; Contract terms raise concerns; Help and moving records need explaining.

What happens before someone buys?

The user journey starts with finding options, then comparing them and checking the details before buying. Here is what AI says at each step.

Finding options

People ask AI for software suggestions. Cedar Desk needs to come up before they can consider it.

AI leaves Cedar Desk out of most suggestions.

What we checked	Result
Brand mentioned or website linked	19.8%
Brand mentioned	14.5%
Website linked	14%

Cedar Desk or a link to its website appears in 19.8% of answers asking for software suggestions. It comes up most often on Perplexity and least often on ChatGPT. These questions did not mention Cedar Desk or any of the competitors in this report.

Buyer question: Which software should a small service team shortlist?

AI rarely brings up Cedar Desk for booking or repeat visits.

What we checked	Result
Taking bookings online	7.5%
Sharing jobs with the office	7.5%
Repeat service visits	5%

Cedar Desk appears in 7.5% of answers about taking bookings online. The figure is also 7.5% for sharing jobs between the office and the crew, and 5% for repeat service visits. Those pages need to explain how the software handles each job.

Buyer question: Which tool handles customer bookings and crew schedules together?

Buyer question: Which software supports recurring service visits?

Competitors come up much more often.

What we checked	Result
Northbeam Work mentioned	82.8%
Juniper Suite mentioned	71.8%
Cedar Desk mentioned	14.5%

Northbeam Work is mentioned in 82.8% of the answers, Juniper Suite in 71.8% and Cedar Desk in 14.5%. These figures count brand mentions in the same software-suggestion questions. They show how often each brand comes up, rather than how often AI recommends choosing it.

Buyer question: What should I compare before choosing field-service software?

Which brands does AI mention most?

For the same software-suggestion questions, AI mentions Northbeam Work far more often than Cedar Desk. This chart counts brand mentions. The overview above also counts answers that link to the website without mentioning the brand.

Brand	Answers mentioning it	What is counted
Cedar Desk	14.5%	Brand mentioned
Northbeam Work	82.8%	Brand mentioned
Juniper Suite	71.8%	Brand mentioned
Pinecrest Cloud	54.2%	Brand mentioned
Silverline Ops	47.5%	Brand mentioned
Oakfield Hub	45.8%	Brand mentioned

Comparing choices

Once buyers have a few options, they compare the price, the features and the work needed to get started.

Price often comes up as a drawback.

What we checked	Result
Average score for price comparisons	35/100
Negative answers, among those scored	87%

AI talks negatively about the cost in 87% of the price-comparison answers that received a score. The average score is 35/100. The website needs to show what the whole team would pay, including extra users and add-ons.

Buyer question: What would three technicians and one office user cost each month?

Buyers need to know who handles repeat visits and payments.

What we checked	Result
Average score for repeat-service comparisons	39/100

Answers about repeat service plans average 39/100. The question behind this is simple. Can Cedar Desk schedule the visits, charge the customer and handle a failed payment, or does the business need another tool for some of that work?

Buyer question: Can a customer pause a maintenance plan without losing future visits?

AI can make getting started sound difficult.

What we checked	Result
Average score for office and crew comparisons	64/100

Answers comparing office and crew features average 64/100, which is more positive. AI likes the flexibility, but some answers make setup sound harder than choosing another product. Show the simplest way to get the first job into the system.

Buyer question: Can the office and a crew use the same job record without a custom build?

How does AI compare Cedar Desk with competitors?

AI describes Cedar Desk differently depending on the competitor and what the buyer needs. Higher scores mean more positive language about Cedar Desk. These are average scores for the answers with a score, not a count of which brand wins.

Compared with	What the buyer needs	Score / 100	What the answers say
Northbeam Work	Sharing jobs between office and crew	64/100	AI likes the flexibility, but gives mixed answers about setup and reports.

Compared with	What the buyer needs	Score / 100	What the answers say
Oakfield Hub	Cost for a growing team	35/100	The fixed cost often counts against Cedar Desk.
Meadowrun	Connecting online booking to other tools	63/100	AI likes the options for changing how it works, but says a simpler start may suit some teams.
Silverline Ops	Software for a growing service business	64/100	Cedar Desk can suit a growing team, but needs to show what its reports include.

What AI praises and questions

AI points a small team toward the cheaper option.

Concern | Google | 22/100

Cedar Desk vs. Oakfield Hub for a small team planning to grow.

Google favors Oakfield Hub because Cedar Desk's fixed costs can be hard to justify for a smaller business.

Show what the whole team would pay. See recommendation 07.

AI likes being able to tailor the software.

Positive point | Perplexity | 85/100

Cedar Desk vs. Meadowrun for connecting online booking to other tools.

Perplexity favors Cedar Desk for the options to change how it works. It also says Meadowrun may be easier to get started with.

Show the simple setup alongside the custom option. See recommendation 11.

Google says the reports may take more work.

Concern | Google | 25/100

Cedar Desk vs. Northbeam Work for reports covering office and crew work.

Google describes Cedar Desk as the harder option because connecting tools and preparing reports may take more manual work.

Explain which records move between tools. See recommendation 19.

Perplexity favors Cedar Desk for the same reporting question.

Positive point | Perplexity | 88/100

The same question about office and crew reports, answered by Perplexity.

Perplexity favors Cedar Desk for its reporting options. Google gives the opposite view. A worked example showing a job and its report would help answer that disagreement.

Show one job and the report it produces. See recommendation 01.

Deciding whether to buy

Before buying, people want to know what they are signing up for, who will help and how to move their records.

Would this work for a small team?

What we checked	Result
Average score for business suitability	46/100

Answers about which businesses Cedar Desk suits average 46/100. A small team needs to know whether it will use enough of the software to justify the cost and setup. Show a normal week for an owner with one or two technicians, including the admin they still need to do.

Buyer question: Would this suit a two-person team with no software specialist?

Buyers need the contract details before they sign.

What we checked	Result
Average score for contract questions	37/100
Negative answers, among those scored	68%

Answers about the agreement average 37/100. Of the answers with a score, 68% are negative. Explain when the plan renews, how to cancel, what a quiet season changes and how customers can get their records if they leave.

Buyer question: What happens to my records if I cancel?

Buyer question: Can I reduce seats during the quiet season?

AI gives mixed answers about customer support.

What we checked	Result
Average score for customer support	49/100

Support answers average 49/100. Some praise the help available; others describe slow replies or confusion about who is handling a problem. The support page should explain who to contact when a crew cannot work and how to get more help if the problem continues.

Buyer question: Who helps when the crew cannot open today's jobs?

Show buyers how to move without losing work.

What we checked	Result
Average score for moving to Cedar Desk	56/100

Answers about moving to Cedar Desk average 56/100. They raise practical questions about which records can move, who checks them and when to stop using the old system. A step-by-step moving guide would help buyers plan that work.

Buyer question: Can we move open jobs without losing deposits or customer history?

What AI praises and questions

AI focuses on extra charges.

Concern | Claude | 22/100

What might we pay beyond the base plan?

Claude spends the answer on extra charges and conditions. Those details overshadow the reasons to choose the plan.

Put the full cost beside the plan. See recommendation 14.

Support complaints put the brand in a poor light.

Concern | Perplexity | 18/100

What complaints should a small business check before buying?

Perplexity focuses on interrupted work, slow help and confusion about who is dealing with the problem.

Show who helps when a crew cannot work. See recommendation 16.

AI praises the help available to developers.

Positive point | Google | 88/100

What help is available if our business uses an outside developer?

Google praises the guides, explanations of errors and help for the developer. Keep that useful information and link to it from the pages about connecting other tools.

Connect the guides to the relevant feature pages. See recommendation 19.

What to change on the website

20 specific changes, with the page, the steps and a way to check each one.

01. Show a job from first request to final invoice.

Finding options | Priority: First | Likely benefit: High

cedardesk.example/

Can the office and the crew work from the same job?

What needs work

The homepage says Cedar Desk helps manage jobs. It sends visitors to separate pages to work out how the office and crew use it together.

What to change

Add five linked steps below the main heading. Show the customer request, accepted quote, assigned visit, completed work and final invoice. Explain who handles each step and show how the same job record carries through.

1. Use one residential repair job for all five steps.

2. Link each step to the page that explains the feature.

3. Show the office screen and the technician's phone screen for the same job.

One job from start to finish

Step	What to show
Request	Customer sends a repair request
Quote	Office prices and confirms the work
Visit	Dispatcher assigns the crew
Complete	Technician adds notes and photos
Invoice	Office sends the final invoice

How to check the work

A visitor can follow one job from request to invoice without needing a demo.

AI includes Cedar Desk in only 7.5% of answers about sharing jobs between office and crew. This page would explain that work in one place.

02. Show how a customer books a job online.

Finding options | Priority: First | Likely benefit: High

cedardesk.example/features/online-booking/

Can customers book work without calling the office?

What needs work

The site mentions booking, but does not show what happens between a customer asking for a visit and the office confirming it.

What to change

Create a booking page showing the service choice, address check, available times, customer details and confirmation. Explain when a customer is only requesting a time and when the booking is confirmed.

1. Show the customer form beside the request that reaches the office.

2. Explain how travel time and available crews affect the times offered.

3. Answer questions about changing a booking, duplicate requests and addresses outside the service area.

What the customer sends and the office receives

Part	What to show
Customer sees	Service, address, requested time and contact details
Office receives	Job request, service area and available crews; confirm the time or suggest another

How to check the work

The page shows what the customer sends and what the person scheduling jobs receives.

Booking questions rarely bring up Cedar Desk. A page about the full booking process would address that missing explanation.

03. Give repeat service visits a page of their own.

Finding options | Priority: Next | Likely benefit: High

cedardesk.example/solutions/maintenance-plans/

How do we keep recurring service visits from being missed?

What needs work

Repeat visits appear in a general feature list. Buyers cannot see how a service plan works over time.

What to change

Build a page around a twice-yearly inspection plan. Show how a customer joins, how visits get scheduled, who sends reminders and what happens at renewal. Explain the billing on a linked help page so readers can tell visits and charges apart.

1. Use a visit every six months as the example.

2. Show what happens when a customer skips or postpones a visit.

3. Link the visit schedule to the customer record and the billing guide.

How a service plan works through the year

Step	What to show
Join	Record the service and how often visits happen
Schedule	Set up the next inspection
Remind	Send the customer and crew a reminder
Renew	Review the plan before it renews

How to check the work

A reader can tell when visits happen and when the customer gets charged.

AI includes Cedar Desk in only 5% of answers about repeat service visits. This gives that task a full explanation.

04. Show how to add a second crew.

Finding options | Priority: Next | Likely benefit: Medium

cedardesk.example/guides/adding-a-second-crew/

What changes when we add our second crew?

What needs work

Cedar Desk comes up in 32.5% of answers about managing several crews. The product page lists access settings but does not show how an owner adds a crew.

What to change

Write a guide for an owner growing from one crew to two. Show the schedule, who can see each job, how to reassign work and what goes into a weekly report.

1. Walk through a day when a technician is absent.

2. Show which jobs a technician, scheduler and owner can see.

3. Finish with a first-week setup checklist and a link to the access settings guide.

Who can see and change a job?

Person	Can see	Can do
Technician	Assigned visits and job notes	Complete work
Dispatcher	Crew schedules and open jobs	Assign or reschedule
Owner	All jobs and operating reports	Manage access

How to check the work

The guide shows who changes a job assignment and who can see the change.

This is a topic where Cedar Desk already comes up more often. The guide would help buyers see how it works.

05. Show how a quote becomes an invoice.

Finding options | Priority: Next | Likely benefit: Medium

cedardesk.example/features/quotes-and-invoices/

Can we invoice the agreed work without entering it again?

What needs work

Quotes and invoices have separate feature descriptions. Cedar Desk appears in 12.5% of answers about this work.

What to change

Follow one job through the accepted quote, deposit, approved extra work and final invoice. Explain whether changing the work updates the original quote or creates a new version.

1. Use the same items and prices throughout the example.

2. Show how a deposit reduces the amount still owed.

3. Include an extra request the customer turns down and show what stays the same.

From agreed price to final bill

Step	Details to show
Accepted quote	Work agreed, price and customer approval
Extra work approved	Added item and the customer's approval
Final invoice	Agreed work minus the deposit already paid

How to check the work

The quote, approved changes, deposit and final invoice all add up.

Buyers would be able to see how the two features work together.

06. Help buyers compare ways to manage their jobs.

Finding options | Priority: Later | Likely benefit: Medium

cedardesk.example/guides/choosing-field-service-software/

When do we need specialist software instead of a calendar?

What needs work

Competitors come up much more often. The product overview does not help buyers compare Cedar Desk with other ways of managing work.

What to change

Publish a guide comparing a shared calendar, a general task tool and software made for service businesses. Give buyers a worksheet covering job volume, crew access, booking, downloading records and total cost. Give independent reviewers the same checked feature information.

1. Use the same questions to compare all three options.

2. Explain when a small team could keep the tool it already uses.

3. Give reviewers test access and facts they can check, then let them make their own judgment.

Three ways to manage the work

Part	What to show
Shared calendar	Book appointments; keep quotes and job records elsewhere
General task tool	Change how tasks work; allow time to set it up
Service software	Keep job details together; check the cost and work needed to move

How to check the work

The guide explains what each option does well, where it falls short and which teams it suits.

Buyers get a useful comparison even if Cedar Desk is not the right choice for them.

07. Show what the whole team would pay.

Comparing choices | Priority: First | Likely benefit: High

cedardesk.example/pricing/

What will our whole team pay, including the office?

What needs work

The pricing page shows a starting price. It does not add up the cost for the owner, office staff and technicians.

What to change

Add a cost worksheet for one owner, one office user and three technicians. Show included users, extra users, optional features and setup charges. Show monthly and annual billing separately, using confirmed prices for every item.

1. Explain which team members need a paid account.

2. List separate charges for booking, messages, storage or moving records, where they apply.

3. Show when payment is due and the total owed over a year.

Show every part of the cost

Cost	Amount to show	Details to explain
Base plan	Published price	When payment is due
Office and technician accounts	Included or charged extra	Number of people
Optional features	Included or charged extra	Features chosen
Setup or moving records	One-time charge or included	Work covered by the charge

How to check the work

A buyer can check every part of the total against the listed prices and payment terms.

AI often describes the price negatively. A full team total gives buyers the detail they need to compare costs.

08. Compare prices for the same five-person team.

Comparing choices | Priority: First | Likely benefit: High

cedardesk.example/compare/cedar-desk-vs-oakfield-hub/

Which option costs less for the features we need?

What needs work

The comparison lists features but does not calculate the cost for the same team on both products or say when the prices were checked.

What to change

Compare one owner, one scheduler and three technicians using booking, quotes and repeat service plans. Use the same payment schedule and include required extras and setup charges on both sides. Link each price to the page that supports it.

1. Keep the team size and required features the same in both columns.

2. Separate one-time charges from regular payments.

3. Add the date prices were checked and links to the supporting pages.

Use the same team and features

What to compare	Cedar Desk	Oakfield Hub
Team	5 people	5 people
Payments	Same payment schedule	Same payment schedule
Features	Booking, quotes and service plans	Booking, quotes and service plans
Total	Add the checked prices	Add the checked prices

How to check the work

A buyer can add up both totals using the prices and conditions shown.

The comparison would show which option costs less for that team and why.

09. Explain which plan suits each kind of team.

Comparing choices | Priority: Next | Likely benefit: Medium

cedardesk.example/pricing/plan-fit/

Are we paying for tools our team will not use?

What needs work

The plan table counts features. It does not help a two-person business decide whether it needs the larger plan.

What to change

Show three examples. Use an owner with one technician, an office with two crews and a seasonal team. Explain which features each team needs, what that costs and when a smaller plan would be enough.

1. Show the people, crews and features included in each example.

2. Link each example to the cost worksheet.

3. Explain how adding or removing a user changes the bill.

Which plan suits the team?

Part	What to show
Owner and technician	Quotes, visits and invoices
Office and two crews	Scheduling and access settings
Seasonal team	Changes to users and quiet months

How to check the work

Each example explains why a plan suits the team, including when to choose the smaller plan.

Buyers can judge whether they would use the features they are paying for.

10. Explain who handles repeat visits and payments.

Comparing choices | Priority: First | Likely benefit: High

cedardesk.example/help/maintenance-plan-billing/

Which recurring tasks happen automatically, and who handles failures?

What needs work

The site uses "recurring" for both visits and charges. Answers comparing repeat service plans score 39/100.

What to change

Add a table showing who schedules visits, sends reminders, gets permission to charge, follows up failed payments and handles plan changes. State what Cedar Desk does, what another connected tool does and what the office handles.

1. Show a payment that succeeds and what happens when one fails.

2. Explain whether pausing payments also pauses future visits.

3. Link to the setup guide for each other tool needed.

Show who handles each task

Task	Who handles it?	What to explain
Schedule a visit	Cedar Desk or office	What starts the process
Take payment	Connected billing tool or office	How the customer gives permission
Failed payment	Person or tool responsible	Who retries it and tells the customer
Pause or cancel	Person or tool responsible	What happens to future visits

How to check the work

Every task has a person or tool responsible for it, including when a payment fails.

Buyers can see whether they need another tool to run their service plans.

11. Show the simplest way to get started.

Comparing choices | Priority: Next | Likely benefit: High

cedardesk.example/get-started/

What is the shortest route to our first live job?

What needs work

The site explains advanced setup first. Some AI answers make Cedar Desk sound harder to start using than another product.

What to change

Show two ways to start. One uses standard job settings and uploaded records. The other connects the tools the business already uses. For the simple start, show the customer details needed, one service template, a test booking and the first assigned visit.

1. List what the business needs before it starts.

2. Mark which settings are required and which can wait.

3. Show what the owner, scheduler and developer each need to do.

Two ways to get started

Part	What to show
Simple start	Upload customers > add a service > test a booking > assign a visit
Connect other tools	Check the connection > match record details > test updates > approve the move

How to check the work

The simple option reaches a test job without needing a custom connection to another tool.

A small team can see the setup work before deciding it needs a developer.

12. Compare how much setup each product needs.

Comparing choices | Priority: Next | Likely benefit: Medium

cedardesk.example/compare/cedar-desk-vs-northbeam-work/

What would our team need to configure in each system?

What needs work

The comparison praises flexibility but does not show when a competitor would be easier to get started with.

What to change

Follow the same job through both products. Compare setup tasks, booking, technician access, access settings and custom work. Include a section explaining when a team should choose the simpler product.

1. Use one job from booking to invoice in both products.

2. List the required tasks without guessing how long they will take.

3. Show which features are included, which need another tool and which need custom work.

Compare the setup work

Task	What is included?	What needs setting up?
Booking	Included or needs another tool	Required steps
Crew access	Included or charged extra	Who can see and change jobs
Records	Upload or automatic updates	Details that must match
Custom way of working	What the product allows	Who does the work

How to check the work

The comparison explains which teams each product suits and the setup work they would need.

Buyers can weigh the extra flexibility against the work it takes to get started.

13. Show how a small team would use Cedar Desk.

Deciding whether to buy | Priority: First | Likely benefit: High

cedardesk.example/solutions/small-service-teams/

Can we use this without an office manager or software specialist?

What needs work

The product page addresses businesses of every size. Answers about whether Cedar Desk suits a business average 46/100.

What to change

Write a page for an owner with one or two technicians. Show a normal week, the setup work and who handles each task. Explain which features they can skip and when a simpler tool would be enough.

1. Follow five jobs through a sample week.

2. Show the tasks the owner still needs to do.

3. Link to the smallest suitable plan and the simple setup guide.

A week for a small team

Part	What to show
Before the week	Add jobs and assign visits
During a job	Save notes, photos and approved changes
Back in the office	Check completed work and send invoices

How to check the work

The page shows the work involved as well as what a small team would gain.

Smaller buyers can decide whether the software suits the way they work.

14. Explain renewal and cancellation beside the price.

Deciding whether to buy | Priority: First | Likely benefit: High

cedardesk.example/pricing/commitment/

What do we owe if we leave, and when must we give notice?

What needs work

The details about signing up and leaving are buried in the terms. AI answers about the agreement average 37/100.

What to change

Add a table beside the price explaining the length of the agreement, renewal date, notice needed to cancel, how to cancel and any charges still owed. Explain access to records after leaving. Link each answer to the relevant contract section.

1. Explain whether paying monthly still means agreeing to a full year.

2. Show where to send a cancellation and how the customer gets confirmation.

3. Have the people responsible for the product and contract check that both say the same thing.

Explain the agreement

Question	Answer to show
When does it renew?	Date and whether renewal is automatic
How do we cancel?	Notice needed and where to send it
What would we still owe?	Charges still due after cancellation
Can we get our records?	How to download them and how long access lasts

How to check the work

The summary and contract agree on dates, conditions and charges.

Buyers can understand what they are agreeing to before they sign up.

15. Explain what changes during the quiet season.

Deciding whether to buy | Priority: Next | Likely benefit: Medium

cedardesk.example/help/seasonal-teams/

Can we reduce the team during the quiet season?

What needs work

Buyers ask about seasonal use, but the pricing page assumes the team stays the same all year.

What to change

Explain how to add or remove users, what minimum payments apply and what happens to stored records. Show how to start again after the quiet season. Add a yearly cost worksheet with busy and quiet months.

1. Show when adding or removing a user changes the bill.

2. Explain what people can still see when their accounts are inactive.

3. Use the published pricing rules to calculate the yearly example.

From the busy season to starting again

Step	What to show
Busy months	Add the people the work needs
Winding down	Finish jobs and download reports
Quiet months	Apply the published rules for fewer users
Starting again	Restore access and check the schedule

How to check the work

A seasonal owner can work out the yearly cost and the steps needed to start again.

The business can judge whether the plan fits both busy and quiet months.

16. Show who helps when the crew cannot work.

Deciding whether to buy | Priority: First | Likely benefit: High

cedardesk.example/support/

Who do we contact when today's jobs will not load?

What needs work

The site promises helpful support but does not explain what to do when a problem stops work.

What to change

Add a table for login problems, missing jobs, booking errors and billing questions. State who to contact, when help is available, what details to send and who takes over if the first reply does not solve it. Use only response times the business has agreed to provide.

1. Put help for problems that stop work above the general contact link.

2. Ask for the job reference, device and error details needed to investigate.

3. Explain how the office can follow up after the first reply.

Make the right help easy to find

Problem	Who to contact	What to explain
Crew cannot work	Urgent support contact	Hours and who takes over if unresolved
Setup question	Setup support	Account details needed
Billing question	Account support	Invoice reference and what happens next

How to check the work

For each problem, the page gives a contact, available hours and a way to get further help.

An owner or technician can find the right help while a job is on hold.

17. Use customer stories that answer buying questions.

Deciding whether to buy | Priority: Next | Likely benefit: Medium

cedardesk.example/customers/

Has a team like ours made this work after onboarding?

What needs work

The site has general customer quotes. Buyers want to know what help is available after they start using the software.

What to change

Add approved customer stories about a small team, a business adding a second crew and a move from another tool. Explain how each team worked before, what setup involved, the help they received and what changed.

1. Get permission for the customer story and every quote.

2. Explain what the software changed and what the team changed itself.

3. Include a practical detail and something that still took work.

What a customer story should explain

Part	What to show
Before	Team, workload and how they managed it
Work involved	Setup, training and who keeps it running
After	What changed, over which period and what still needs work

How to check the work

Each result has the customer's approval and states what was compared and over which period.

Buyers can see how a business like theirs uses the software after setup.

18. Show how to move records and unfinished jobs.

Deciding whether to buy | Priority: First | Likely benefit: High

cedardesk.example/switch-to-cedar-desk/

Can we move without losing work already in progress?

What needs work

The upload guide covers customer records. It does not explain unfinished jobs, deposits or the last week using the old tool.

What to change

Add a moving checklist for customers, job history, open quotes, scheduled visits, files and unpaid invoices. Give each part a person responsible for it. Show a test upload before switching the business over.

1. List the file details the tool accepts and the records that need manual work.

2. After the test, check that job counts and unpaid balances match the old system.

3. Choose when to switch, keep a backup copy and agree who signs off on the move.

Check each kind of record before moving

Records	Work needed	How to check
Customers and addresses	Match the details	Look for duplicate records
Open quotes and jobs	Keep their progress	Check the counts match
Invoices and deposits	Match the balances	Review anything that differs
Files	Check accepted formats	Open a few files from each batch

How to check the work

For every kind of record, the checklist shows who moves it, the test result and how to confirm it is correct.

The owner and office can plan the move without losing track of work in progress.

19. Explain what happens when other tools connect.

Deciding whether to buy | Priority: Next | Likely benefit: High

cedardesk.example/integrations/

Will a changed invoice or visit update in both systems?

What needs work

The page shows logos of other tools. It does not explain which records pass between them or whether changes update both tools.

What to change

Create a page for each connection. List the records it shares, which way they move, when updates happen, the plan needed and what happens if an update fails. Start with accounting and calendar tools.

1. List customers, quotes, jobs, invoices and payments separately.

2. For each kind of record, explain which tool is used to make changes.

3. Show a failed update and how to try again or correct it by hand.

Explain what passes between tools

Record	Which way does it move?	Details to explain
Customers	One way or both ways	When it updates and who handles it
Visits	One way or both ways	What happens when a time changes
Invoices	One way or both ways	Changes and cancellations
Failed updates	Alert and another attempt	How to correct it by hand

How to check the work

Each connection explains what moves, when it moves and who fixes a failed update.

Buyers can check whether the tools they use will still work together after the move.

20. Explain what works without a phone signal.

Deciding whether to buy | Priority: Next | Likely benefit: Medium

cedardesk.example/help/mobile-connectivity/

What happens if the technician loses service at a job?

What needs work

The mobile page says technicians can work on site. It does not explain which actions need an internet connection.

What to change

Add a table covering opening a job, viewing directions, writing notes, adding photos, saving customer approval and finishing a visit. Explain what happens if the office and technician change the same job.

1. Mark what works without a signal, what waits to upload and what cannot be done.

2. Show how a technician checks that saved changes have reached the office.

3. Explain how to fix a duplicate record or two different changes to the same job.

Show what needs a connection

Action	What works?	Details to explain
Open a scheduled job	Without a signal or online only	Which saved jobs can be opened
Add notes or photos	Saved, waiting to upload or unavailable	How to see what is waiting
Save customer approval	Available or unavailable	What proof of approval is kept
Finish the visit	When changes reach the office	What happens if two people change the job

How to check the work

Every listed action matches what the app does when tested with and without a connection.

Crews can check what they will be able to do at a job with poor phone service.

What to do first

Start with the tasks marked First. Likely benefit is our estimate of how helpful each change could be.

Task	Priority	Likely benefit
[ ] 01. Show a job from first request to final invoice.	First	High
[ ] 02. Show how a customer books a job online.	First	High
[ ] 07. Show what the whole team would pay.	First	High
[ ] 08. Compare prices for the same five-person team.	First	High
[ ] 10. Explain who handles repeat visits and payments.	First	High
[ ] 13. Show how a small team would use Cedar Desk.	First	High
[ ] 14. Explain renewal and cancellation beside the price.	First	High
[ ] 16. Show who helps when the crew cannot work.	First	High
[ ] 18. Show how to move records and unfinished jobs.	First	High
[ ] 03. Give repeat service visits a page of their own.	Next	High
[ ] 04. Show how to add a second crew.	Next	Medium
[ ] 05. Show how a quote becomes an invoice.	Next	Medium
[ ] 09. Explain which plan suits each kind of team.	Next	Medium
[ ] 11. Show the simplest way to get started.	Next	High
[ ] 12. Compare how much setup each product needs.	Next	Medium
[ ] 15. Explain what changes during the quiet season.	Next	Medium
[ ] 17. Use customer stories that answer buying questions.	Next	Medium
[ ] 19. Explain what happens when other tools connect.	Next	High
[ ] 20. Explain what works without a phone signal.	Next	Medium
[ ] 06. Help buyers compare ways to manage their jobs.	Later	Medium