



Datasheet

# Sage Field Operations for service

Sage

# Table of Contents

## Page 3

Sage Intacct for Construction

## Page 4

Example process

## Page 5

Single source of truth

## Page 6

Reduce administrative work and increase accuracy

## Page 7

Optimize resource scheduling

## Page 8

Know where you stand with work orders and schedule changes in the field

## Page 9

Capture time worked in the field

## Page 10

Holistic service organization visibility



# Sage Intacct for Construction

Sage Field Operations, integrated with Sage Intacct accounting and customer data, gives service-providing companies a superior tool to manage the work order life cycle.

Office staff have “to-the-minute” information for seamless scheduling and can collaborate with field staff to manage service assignments using the critical information needed onsite. This streamlines communication between the field and the office and helps deliver higher quality work with improved efficiency and maximum profitability from field operations. Use Sage Field Operations with Sage Intacct to deliver excellent customer service, improve client retention, and win new business.

## Benefits

**Simplify service operations** and reduce time-to-invoice by accurately and efficiently tracking time, materials, billing amounts, and more—in the office or on site.

**Improve office-to-field communication in real time** by capturing hours, documenting equipment repairs, generating purchase orders and invoices for Sage Intacct, and more.

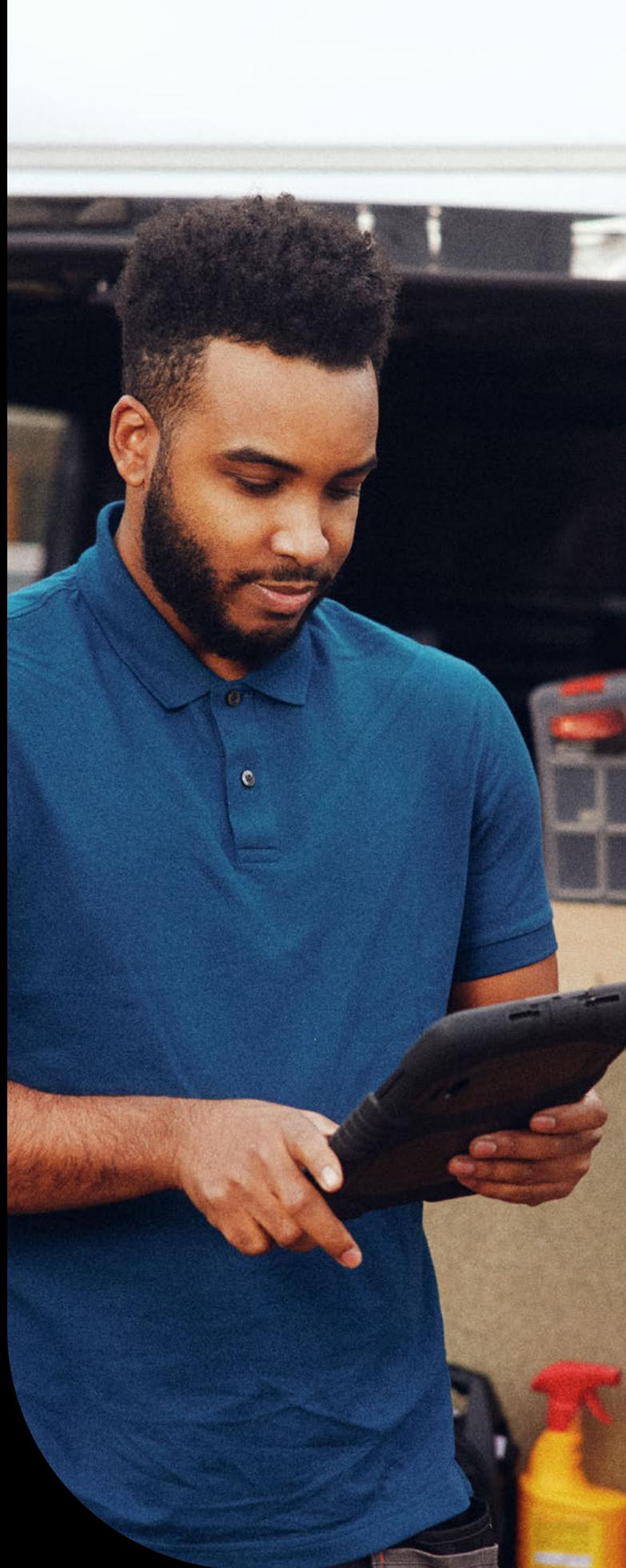
**Integrate workflows and critical information** like invoices, purchase orders, AR customers, and inventory directly to Sage Intacct.

**Optimize new business opportunities onsite** by creating, tracking, and following up with quotes from right where you are.

**Create and manage service agreements** for customers, schedule service work based on agreement terms and timetables, and oversee cost and revenue for all service agreements.

**Cut down on paperwork and administrative overhead** by eliminating duplicate data entry and reducing errors caused by misread technician and field supervisor notes.

**Manage work order parts, materials, and pricing and leverage inventory and stocking locations** to keep cost information consistent and maintain data integrity.



# Example process



## Service manager

Ensure accuracy of your work orders and relieve your staff from hours of manual data entry.



### Technician goes out to provide a quote

Technicians can check accurate work order details and up-to-date schedules and generate quotes in the field to improve productivity and deliver outstanding customer service.

### Taking calls, dispatching, and scheduling

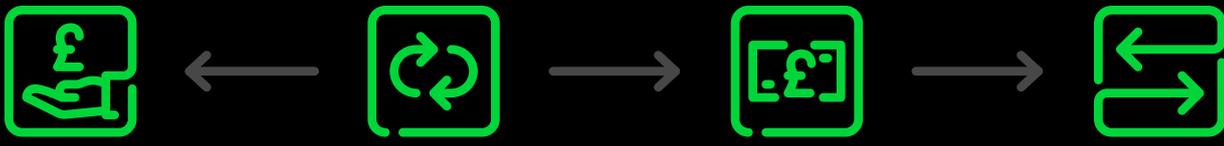
Improve communication between technicians and office staff while reducing paperwork and manual errors.

Technician travels to customer job site.



### Technician completes work, gets approval from customer

Enhance your customers' overall experience by giving them the ability to electronically schedule a job or appointment and securely access account information anytime, anywhere.



Invoice generated from SFO; billing managed in Intacct.

Work order details automatically sync with Sage Intacct for Construction.

Accounts payable enters payroll time, updated inventory, and generates purchase orders.

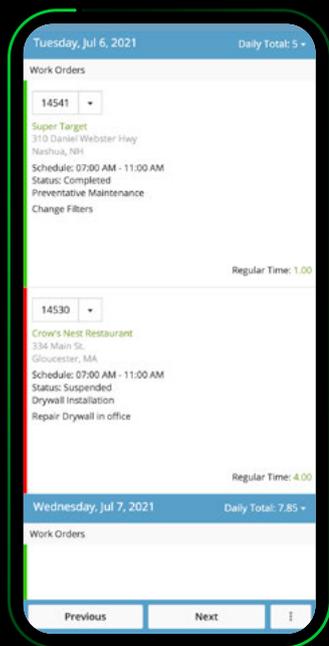
An invoice is generated by Sage Field Operations, updating inventory and the billing is managed in Intacct.



# Single source of truth

The comprehensive integrated solution for back-office and field team functionality coupled with Sage Intacct, a leading accounting platform is what makes Sage Field Operations unique.

All employees are working with the same data at the same time, so your team will always have the latest information available.







**Field Operations**

- Emp. Center
- Dispatch
- Assignments**
- Jobs

## Assignments

Monday, Jul 5, 2021
Daily Total: 9 -

Miscellaneous Assignments

231	Holiday PTO	Schedule: 07:00 AM - 03:00 PM Status: Completed	Regular Hourly Pay: 8.00
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Work Orders

14542	<b>Super Target</b> 310 Daniel Webster Hwy Nashua, NH	Schedule: 07:00 AM - 11:00 AM Status: Completed Preventative Maintenance	Chemical Clean System Holiday Double: 1.00
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Tuesday, Jul 6, 2021
Daily Total: 5 -

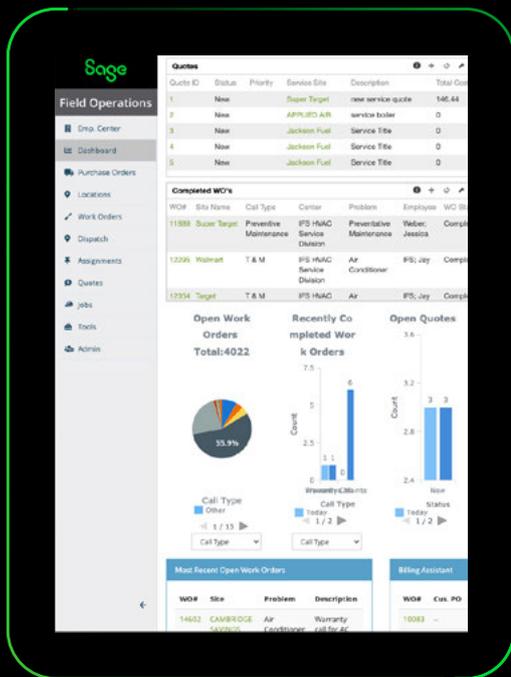
Work Orders

14541	<b>Super Target</b> 310 Daniel Webster Hwy Nashua, NH	Schedule: 07:00 AM - 11:00 AM Status: Completed Preventative Maintenance	Change Filters Regular Time: 1.00
14530	<b>Crow's Nest Restaurant</b>	Schedule: 07:00 AM - 11:00 AM Status: Suspended	Auto populate standard task Regular Time: 4.00

# Reduce administrative work and increase accuracy

Relieve your dispatcher, service manager, and accounting staff from hours of manual data entry and ensure the accuracy of your work orders, billing, and payroll.

- Generate service tickets with predefined work descriptions so documentation is professional and detailed for billing and customer review.
- Create Intacct-integrated purchase orders from the field to order material and speed up job completion.
- Simplify payroll with immediate capture of work order and miscellaneous time from the field.
- Enable technicians to take payments, collect signatures, and email receipts from the service location.



# Optimize resource scheduling

The Sage Field Operations Dispatch Scheduler offers many flexible views to suit your business and make dispatching your resources a breeze.

- View assignments by day, week, or month, or use the Priority View to organize assignments by importance.
- Schedule and view all service resources including equipment and vendors.
- Create custom Dispatch Groups and team views for additional flexibility.



**TUFNEL construction**

**DISPATCH REPORT**

WORK ORDER: 14530

DATE: 01/09/2021

**CUSTOMER:** Dave's Best Restaurant (204-238)    **NAME:** Raymond (RM) 11076

**STREET:** 300 Main St    **CITY:** Gloucester, MA 01930

**CONTACT:** Eric

**CALL TYPE:** Warranty Call

**TRUCKS REPORTED:** Dropped Installation

**WORK PERFORMED:** Completed the Dropped repair for this client on 01/09/2021

**ASSIGNMENTS**

DATE	LABOR	TECHNICIAN	UNIT	TOTAL
01/09/2021	1	Barry, John (Service Labor)	930.00	930.00

**EQUIPMENT**

DATE	LABOR	TECHNICIAN	UNIT	TOTAL
01/09/2021	1	Barry, John (Service Labor)	930.00	930.00

**SALES AMOUNT:** \$785.00  
**SALES TAX:** \$27.85  
**BALANCE:** \$812.85

**IS JOB COMPLETE? —**

**Customer:** Name: jay@tufnel.com, Date: 01/09/2021 04:44 PM, Comments: jay@tufnel.com

**Employee:** Name: jay@tufnel.com, Date: 01/09/2021 04:44 PM, Comments:

**TUFNEL construction**

**SERVICE REQUEST**

WORK ORDER: 14530

DATE: 01/09/2021

**CUSTOMER:** Crow's Nest Restaurant (LAR) 238)    **NAME:** Honeywell (HW) 11371

**STREET:** 134 Main St    **CITY:** Gloucester, MA 01930

**CONTACT:** Eric

**CALL TYPE:** Warranty Call

**TRUCKS REPORTED:** Dropped Installation

**WORK PERFORMED:** Completed the Dropped repair for this client on 01/09/2021

**IMAGE ATTACHMENTS**

**Title:** Images of site\_3    **Date:** Jul 9, 2021 04:26 PM

**Title:** Images of site\_2    **Date:** Jul 9, 2021 04:26 PM

**DESCRIPTION:**

QTY	UNIT	DESCRIPTION	UNIT PRICE	TOTAL
1	Misc. Item	Basic Materials for 100SQFT area	\$150.00	\$150.00
1	Misc. Item	Misc Materials	\$1375.00	\$1375.00

**LABOR**

DATE	LABOR	TECHNICIAN	UNIT	TOTAL
01/09/2021	1	Barry, John (Service Labor)	930.00	930.00

**SALES AMOUNT:** \$785.00  
**SALES TAX:** \$27.85  
**BALANCE:** \$812.85

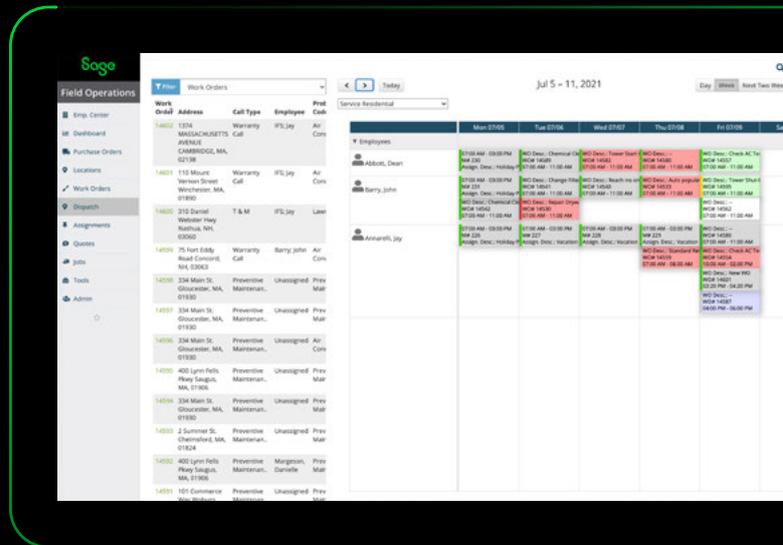
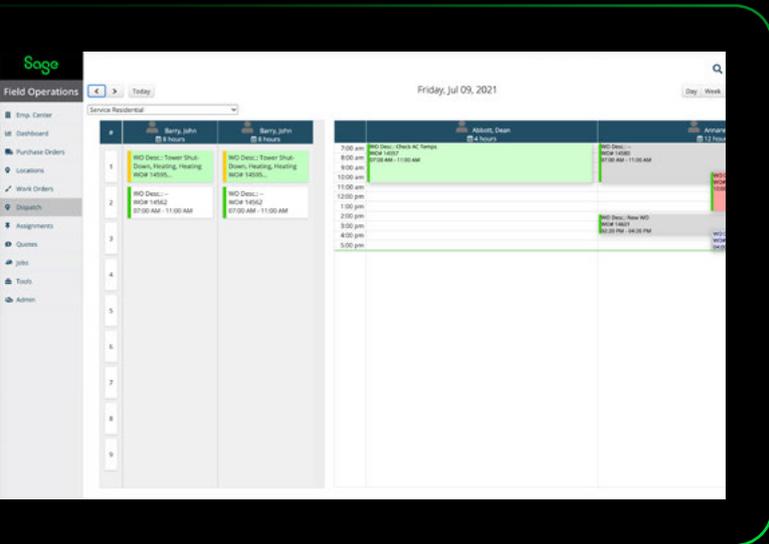
**IS JOB COMPLETE? —**

**Customer:** Name: jay@tufnel.com, Date: 01/09/2021 04:44 PM, Comments: jay@tufnel.com

**Employee:** Name: jay@tufnel.com, Date: 01/09/2021 04:44 PM, Comments:

# Know where you stand with work orders and schedule changes in the field

With Sage Field Operations, managers and technicians have access to real-time information anytime and anywhere. Increase the efficiency of your service operations with the ability to track critical items in the field including assignments, work orders, quotes, purchase orders, customer equipment, site history, refrigerant, notes, photos, and time worked.





# Capture time worked in the field

Work order time and miscellaneous time (like vacation or sick pay) are collected in the field through an intuitive time entry form or calculated automatically from a punch in/out format. Workers can punch in and out of work right from their mobile devices or, if you prefer, supervisors can enter start and end times and pay types for individuals or an entire crew.

- Track travel times, breaks, and lunches as well as vacation and sick pay.
- Customize time review and approval workflows.
- Capture signatures on timesheets.

# Holistic service organization visibility

Owners, executives, and service managers can use Sage Field Operations to easily drill down into service activities. View recent work orders, billing information, upcoming assignments, and more to plan resources effectively.



## Sage Field Operations features

Features	Basic	Standard	Enterprise
Service management and sales quotes	•	•	•
Time and attendance, employee center	•	•	•
Project management (coming soon)	•	•	•
Maintenance agreements		•	•
Inventory	•	•	•
Customer web portal		•	•
Core forms		•	•
Custom fields		•	•
Automated tasking		•	•
Vendor portal (coming soon)			•
Multi company support			•
Email support	•	•	•
Phone support		•	•
Account manager / premium support			Over 30 users

For more information contact your  
Sage business partner or customer  
account manager:

[sage.com/en-us/sage-construction](https://sage.com/en-us/sage-construction)

Call us at:

800 628 6583

[sage.com](https://sage.com)

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