

Sage Service Operations

Overview

Effectively manage service operations and reduce the time to invoice. Sage Service Operations enables technicians to complete their work in less time and make fewer trips by providing the real-time information they need in the field on any tablet or mobile device. Sage Service Operations also reduces administrative time by integrating with your Sage 100 Contractor or Sage 300 Construction and Real Estate solution.



Benefits

- Simplify service operations and reduce the time to invoice by tracking time, materials, billing amounts, and more from the field quickly and accurately.
- **Improve communication** between office staff and field technicians by capturing details like time, materials used, notes, and work order status in real time.
- Better manage potential new business with the ability to create, track, and follow up on quotes while on site with the customer.
- Enhance customer service by giving your clients the ability to take control of their account information and submit service requests anytime, anywhere.
- Reduce paperwork and administrative overhead by eliminating duplicate data entry or errors caused by misreading technician notes.

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

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

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Emplo	yee Center Dashboard	Dispatch	Assignments Jobs	Quotes Tools - SSC Adm	in 🔻 Help
Assigr	ed Work Orders ϕ	Ø Assignment L	ist 🗇 Employee Assig	prments + Work Order + Misc. As	signment + +
WO #	Site	WO Status	Problem	Description	
	AY, JAN 18, 2015	no otatas	11001011	00000000	
MOND	AY, JAN 19, 2015				4 (Daily Total) 4 (Regular Time)
12019	TARGET CORPORATION 2211 N Semoran Blvd Orlando, FL	Open	Electrical Issue	Lights out	e Site + PO 4 (Regular Time)
TUESC	DAY, JAN 20, 2015				0 (Daily Total)
11867	Walmart 3838 South Semoran Boulevard Orlando, FL	Open	Air Conditioner	Compressor Replacement	Site + PO
11901	Target Warehouse 3201 II Colonial Dr F6 Orlando, FL	Open	Electrical Issue	Lights are not working, need servi tonight.	ice Site + PO
WEDN	ESDAY, JAN 21, 2015				6 (Daily Total 6 (Regular Time
12020	Walmart 3838 South Semoran Boulevard Orlando, FL	Open	Heater	Heater maintenance	Site + PO 6 (Regular Time
THUR	SDAY, JAN 22, 2015				0 (Daily Total
11902	Target Warehouse 3201 E Colonial Dr F6 Orlando, FL	Open	Electrical Issue	Transformer Replacement	Site + PO
FRIDA	Y, JAN 23, 2015				
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11900	2201 E Colonial Dr F6 Orlando. FL	o'ben		neeus repan	🖾 Sibe 🕇 PO
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Technicians can check their scheduled work orders, see client history, and enter work order details while on site.



Technicians

Sage Service Operation YOUR LOGO HERE Agnes Herb ord Log Ou Search Site Content + Work Order + Quote + Equipment
 Work Orders (14)
 Equipment (5)
 Quotes (2)
 Notes (3)
 Forms (1)
 Agreement (0)
 Site Detail
 Content (5)
 01/07/2015 11859 Closed Air Conditioner new hot water heater flat rate taxable- flat rate tax on FR setup screen 01/07/2015 11858 Invoiced Air Conditioner 01/07/2015 11857 Closed Air Conditioner new hot water heater flat rate tax exempt -flat rate tax on FR setup scr... new hot water heater flat rate taxable- no flat rate tax on FR setup screen 01/07/2015 11856 Invoiced Drywall Installation new hot water heater flat rate tax exempt - no flat rate tax on FR setup. 01/07/2015 11855 Open Air Conditioner flat rate items that have a product tax group is equal to blank 01/07/2015 11854 Open Air Conditioner stuff needs to be fixed Adam wth a Flat Rate Job Fix the Heat flat rate pricing via SM fix the heat - flat rate pricing please via T 01/07/2015 11853 Heater 01/07/2015 01/06/2015 11851 Open Electrical Issue the alarm is going off please send a tech Air Con 01/06/2015 12/29/2014 11830 Open a... Tower Shut-D Preventative M 1/20/2014 Air Conditi

Increase effectiveness of field work by giving technicians instant access to the site information needed to complete work orders faster.

See what's going on in your service department

Owners, executives, and service managers can use the dashboard to see service activities at a glance. View recent work orders, billing amounts, upcoming and overdue preventative maintenance tasks, and more so you can plan resources effectively.





Owners

Keep key stakeholders in the loop with the ability to see work orders, invoices, and upcoming tasks with the easy-to-use dashboard.

Reduce administrative work and increase accuracy

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

- Populate work tickets with predefined work descriptions so documentation is professional and detailed for billing and customer review.
- Create a purchase order from the field to order parts and speed up job completion.
- Simplify payroll with immediate capture of work order time from the field.
- Enable technicians to take payments and email receipts from the job site.



Dispatchers

Provide a superior customer experience

Give your customers their own customized, self-service website to request service, check work status, and more.

Sega Service Service Sega Service Service Setting: Log More Request Service Equipment Request Service Equipment This message is customizable to better communicate the service request process. Location: Waimset - Orlando FL Requested By: Agrees Media Problem: Agrees Media Purchase Order: 2452555 Priority: Normal Mo star in the "warehouse." It the "warehouse."				7:5	54 AM				
Sage Service Operations 1.0.000 Trees Medical, MA Service Operations 1.0.000 Trees Medical, MA Agree He Settings: Log Nome Request Service Request Service Equipment Request Service Equipment Request Service Equipment Request Bip: Agree He Agree He Agree He Agree He Medical Service Problem: Arrowski Service Problem: Arrowski Service Problem: Arrowski Service Problem: Arrowski Service Proslowing Agree He Agree He Nomai Image: Agree He No als: In the Warehouse. Image: Agree He	https://www.mobilessc.com	(service requests	0 - 6	12dx	IFS Same Service One	rations - S X			
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Request Service This message is customizable to better communicate the service request process. Location: * Weimari - Orlando, FL Requested By:* Age Ferda Problem:: Air Conditioner Purchase Order: 245555 Priority: Nomai No als: In the warehouse. *		17 Locust Stre Suite 201					buget		Agnes Her Settings Log (
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	Priority: Please explain to 176 characters remaining	Normal he reason for your	ur request:						
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Sarch Uccation Description Status Problem POF Request Date *	Request Filter Search Location All Status	wo4	Location Walmart	Heater	needs repair	Open	Heater		Feb 18, 2015



Customers

Customers can see up-to-date status on all work orders, invoices, equipment, and more without having to call your office staff.

For more information, contact your Sage business partner or customer account manager at 800-858-7095.

About The Sage Group plc

We provide small and medium-sized organizations and mid-market companies with a range of easy-to-use, secure, and efficient business management software and services—from accounting, HR, and payroll to payments, enterprise resource planning, and customer relationship management. Our customers receive continuous advice and support through our global network of local experts to help them solve their business problems, giving them the confidence to achieve their business ambitions.

Formed in 1981, Sage was floated on the London Stock Exchange in 1989 and entered the FTSE 100 in 1999. Sage has millions of customers and circa 13,000 employees in 23 countries covering the UK & Ireland, mainland Europe, North America, South Africa, Australia, Asia, and Brazil. For further information please visit <u>www.sage.com</u>. Follow Sage North America on Facebook, <u>Facebook.com/Sage</u>, and Twitter, <u>Twitter.com/SageNAmerica</u>.

For more info, visit: <u>SageCRE.com</u> or contact us at 800-628-6583

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