sage
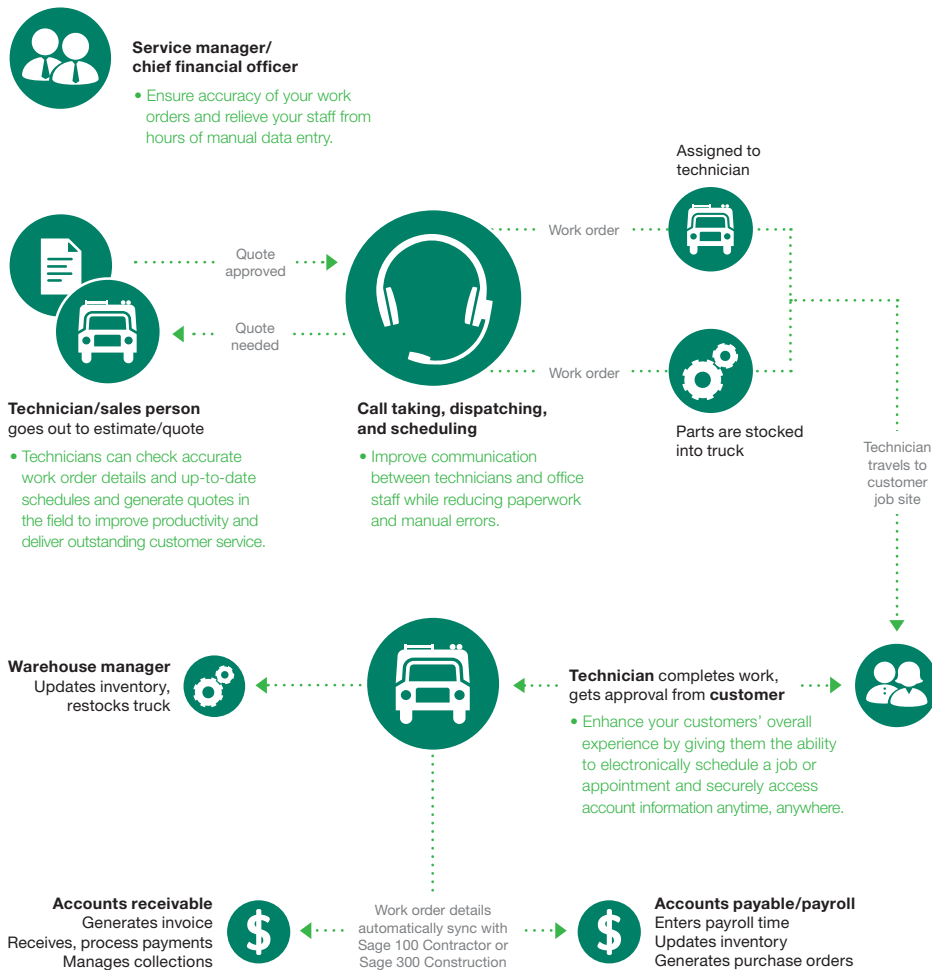
Sage Service Operations

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.

Service manager/ chief financial officer
- Ensure accuracy of your work orders and relieve your staff from hours of manual data entry.

Assigned to technician

Quote approved

Work order

Quote needed

Work order

Parts are stocked into truck

Technician travels to customer job site

Technician/sales person
goes out to estimate/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.

Call taking, dispatching, and scheduling
- Improve communication between technicians and office staff while reducing paperwork and manual errors.

Warehouse manager
Updates inventory, restocks truck

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.

Accounts receivable
Generates invoice
Receives, process payments
Manages collections

Work order details automatically sync with Sage 100 Contractor or Sage 300 Construction

Accounts payable/payroll
Enters payroll time
Updates inventory
Generates purchase orders

Sage Construction and Real Estate

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.
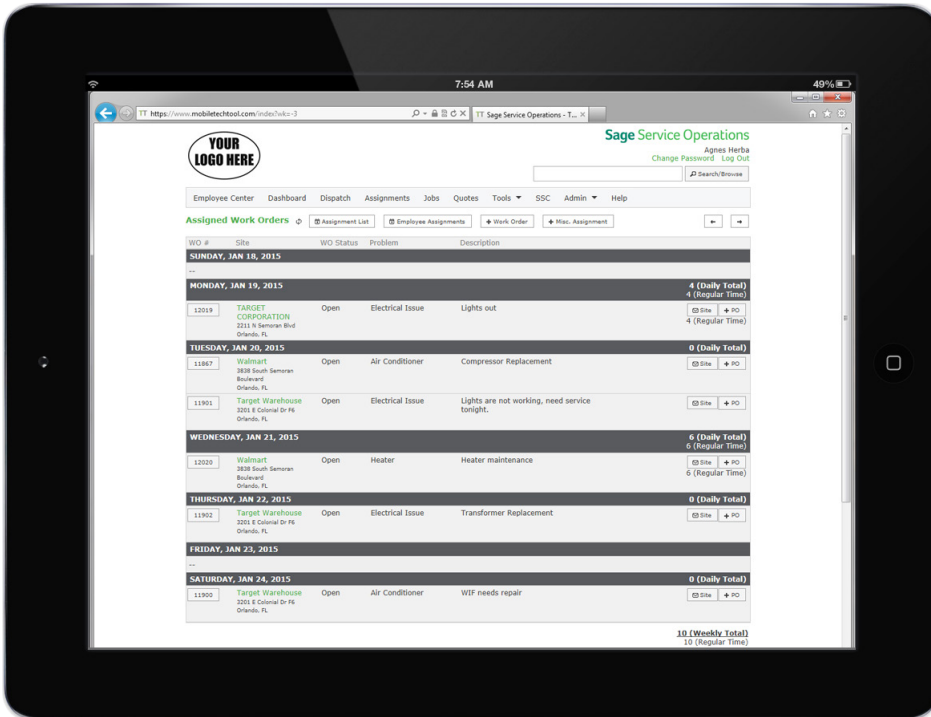
Technicians can check their scheduled work orders, see client history, and enter work order details while on site.
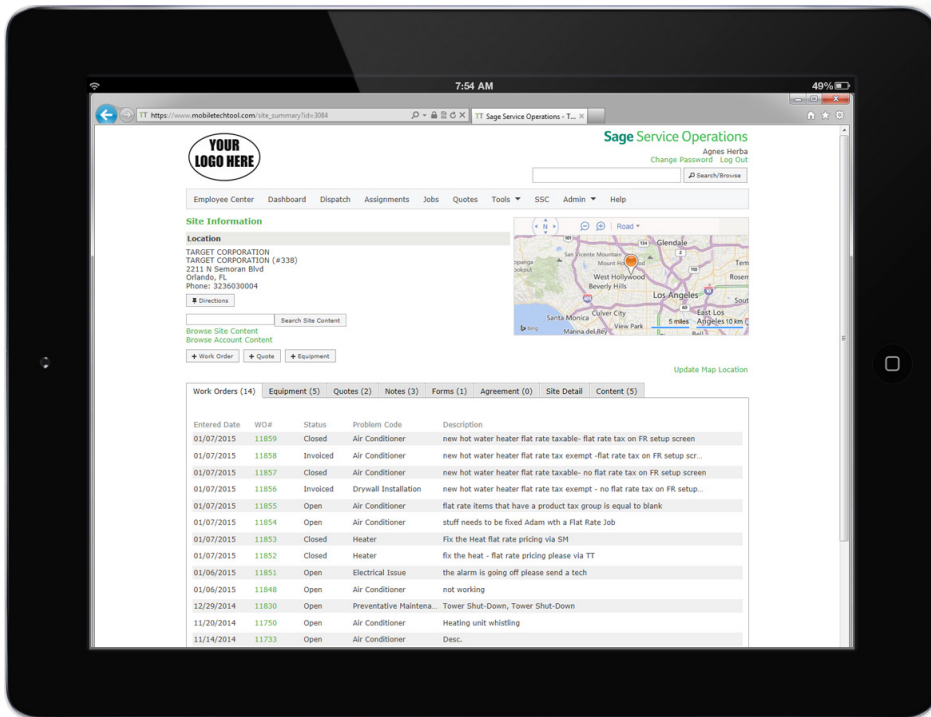
Technicians

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

Sage Construction and Real Estate

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.
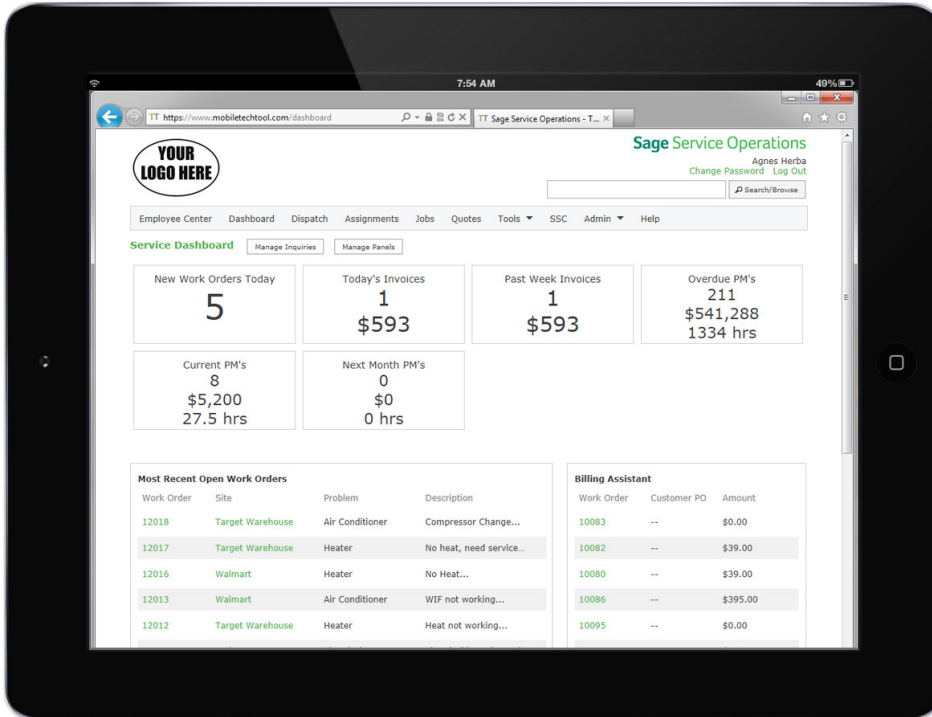

Owners

▶ 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.

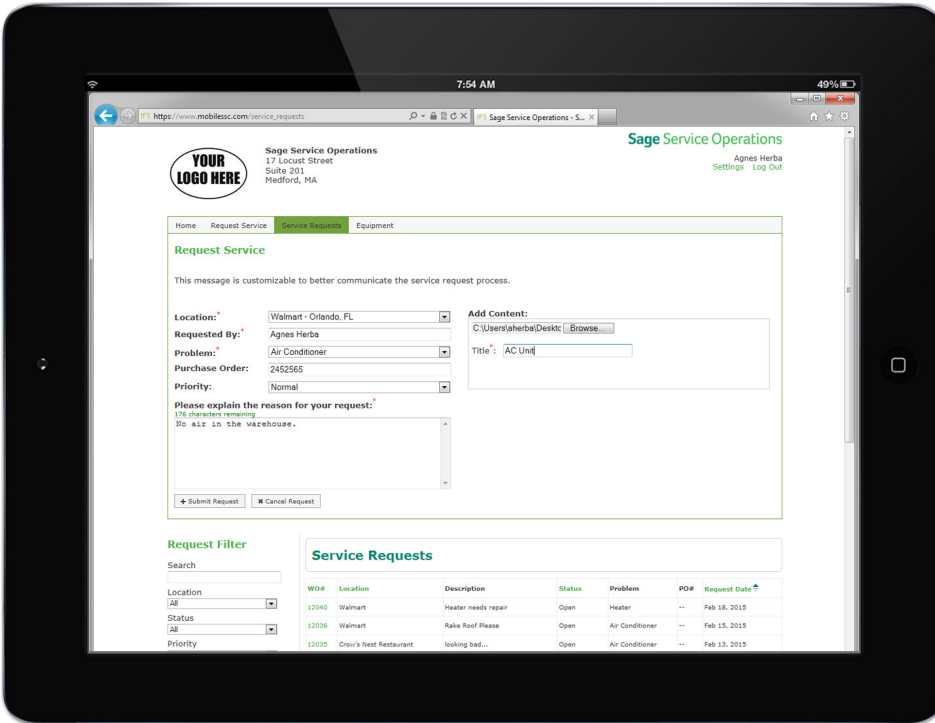- Enable technicians to take payments and email receipts from the job site.
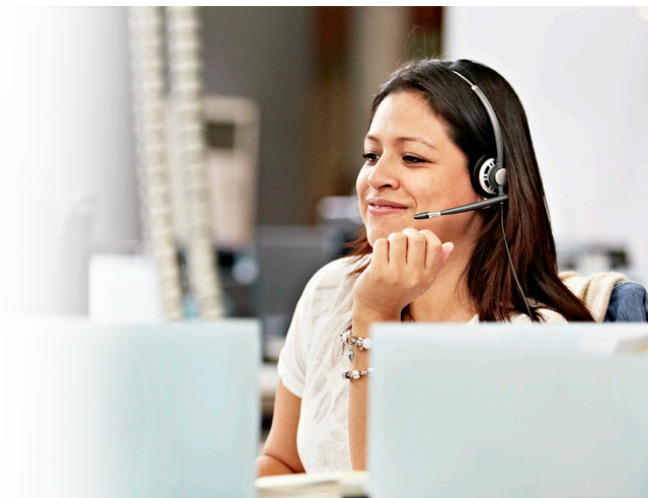
Dispatchers

Sage Construction and Real Estate

Provide a superior customer experience

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

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 www.sage.com. Follow Sage North America on Facebook, Facebook.com/Sage, and Twitter, Twitter.com/SageNAmerica.

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