



MOBILE



COMPUTER



TABLET

Enhance your communication link between the field and mission control.
Get **FIELD PORTAL** today.

Alternatively call your Sage Solution Provider to arrange a quick (30 minute) demonstration.

YOU'RE RUNNING SAGE 300CLOUD AND SERVICE MANAGER®. YOU HAVE A TEAM OF ROVING FIELD TECHS AND ENGINEERS, MAYBE EVEN A BATTALION. YOUR BUSINESS DEPENDS HEAVILY ON COMMUNICATION BETWEEN THE FIELD AND MISSION CONTROL.

CAN THIS VITAL COMMUNICATION LINK IN YOUR BUSINESS PROCESS BE IMPROVED?

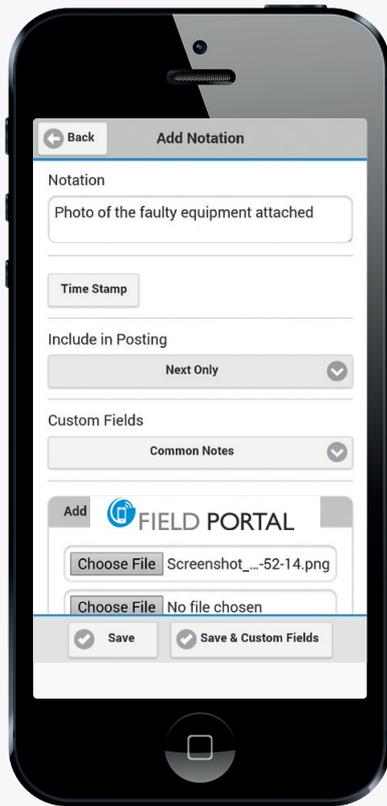
FIELD PORTAL continues Technisoft's legacy of innovative software designed specifically to improve business processes and systems. This time Technisoft took a walk in your field techs' shoes. Here's what they came back with.

FIELD PORTAL is a software application that fully integrates with Sage 300cloud and Service Manager®. It's device independent and runs via the **browser** or **offline app**. and supports Apple, Android, and Windows phones as well as iPads, Android tablets and Windows Surface tablets. And it's touch-driven for ease-of-use.

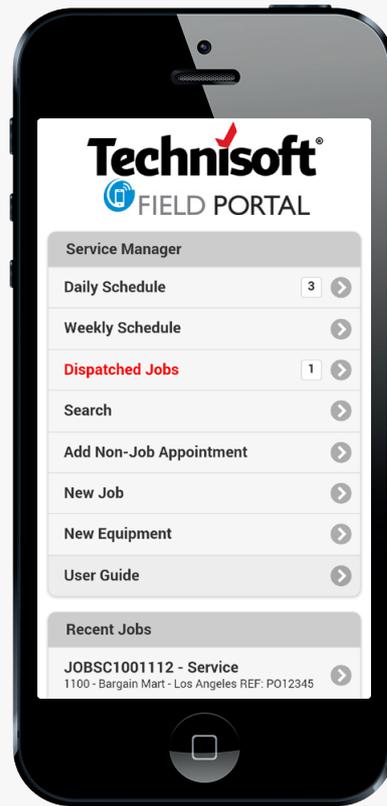


Contact your Sage 300cloud Solution Provider for further information.
Contact details below for up-to-date information on Technisoft products.
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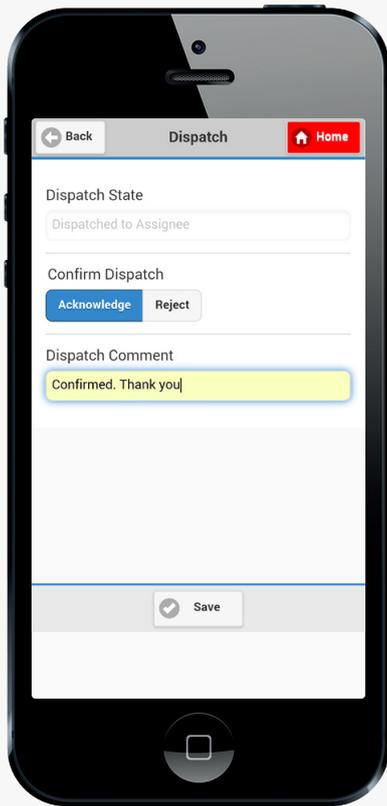




SECURE LOGIN
 Authentication required.
 Automatic inactivity time out.
 Multi-company support.

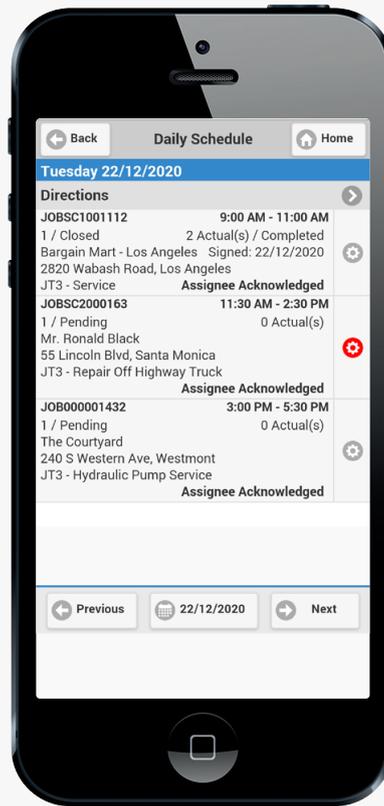


FIELD PORTAL DAILY / WEEKLY SCHEDULE
 View Daily or Weekly Schedules or recent Job Dispatches (red).



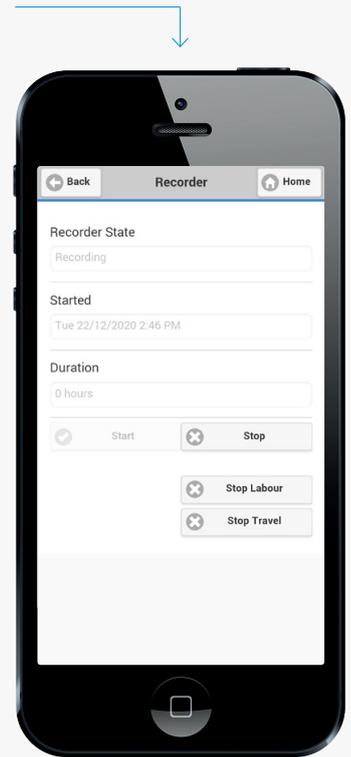
DISPATCH

Instantly acknowledge or reject a dispatch. Add a comment or reason for the confirmation. Red Home button signifies newly dispatched jobs.



RECORD TIME

Press the record button (red) to start or stop recording time. Record travel to site or labor.



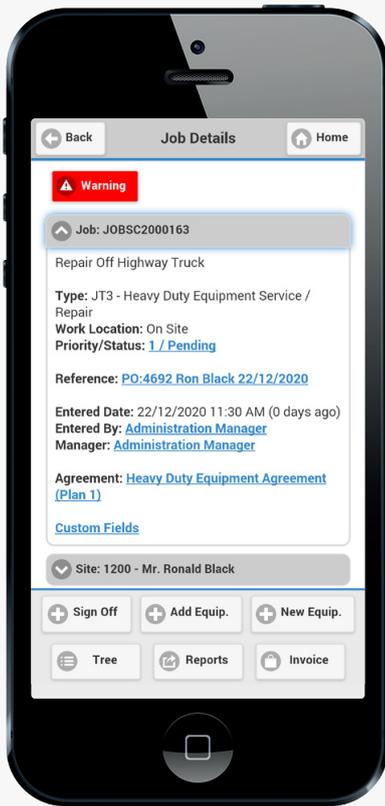
RECORDER

Quickly add a service from a favourites list after completing a recording.

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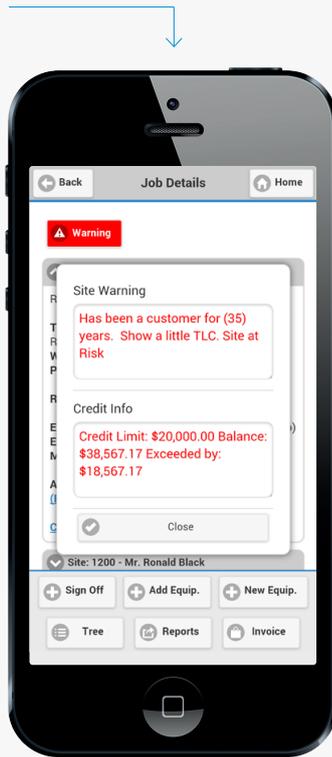
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Sage Tech Partner

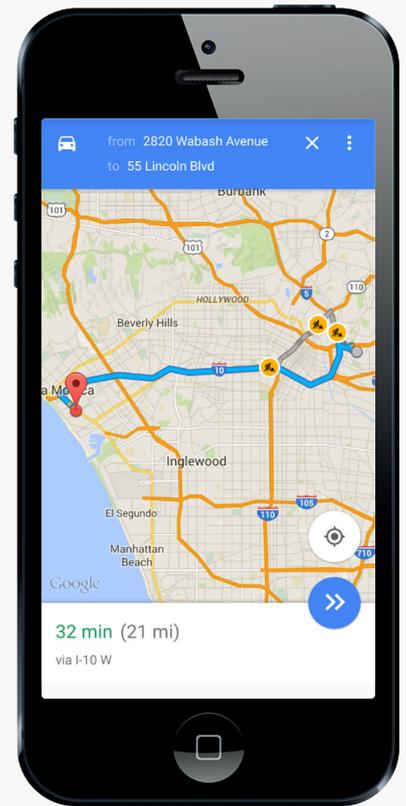


JOB/QUOTE DETAILS

Edit or review existing job/quote details. Click a contact phone # to auto-dial the contact. Warnings provide credit checks and important information about the customer.



WARNING



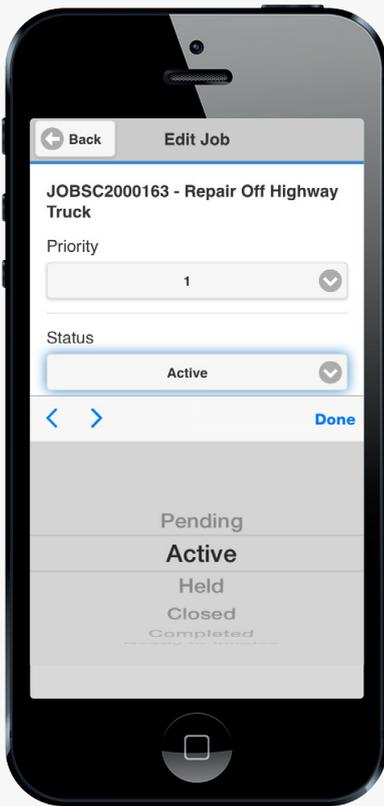
MAPS

Click the customer address to load a map and obtain directions (uses device's mapping program).

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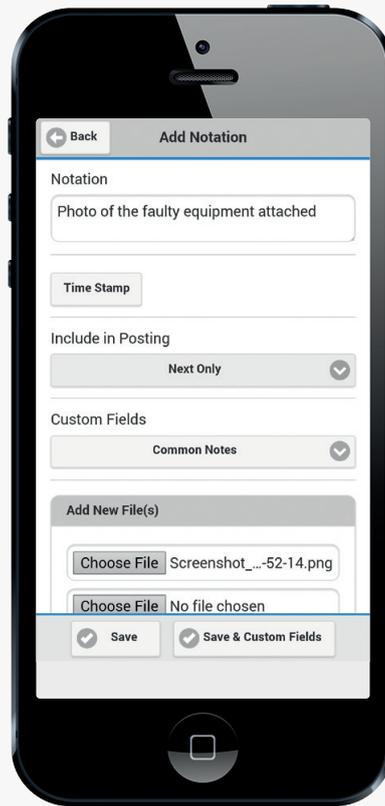
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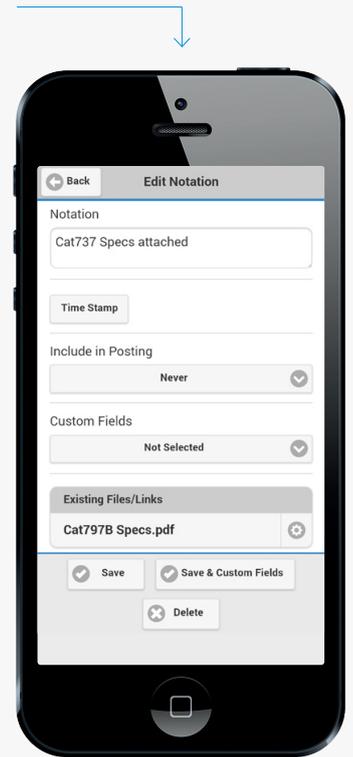
CHANGE STATUS PRIORITY

Update the status and priority of the job at any time.



JOB NOTATION

Enter new notes. Upload files or photos. Update, keep or remove files. View existing notes and attachments (photos, manuals, safety documents, drawings, agreements).

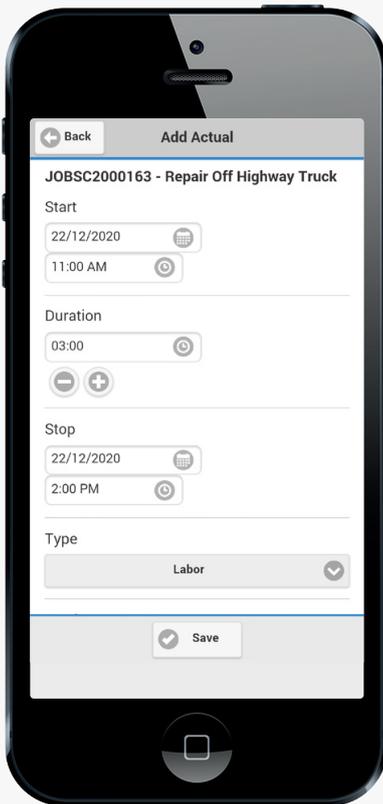


EXISTING NOTATION



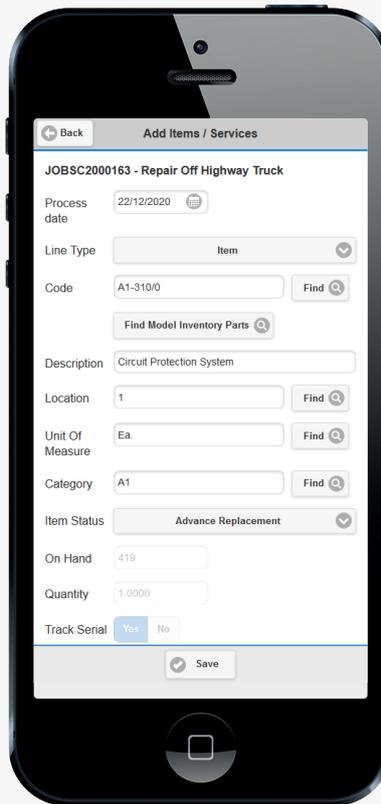
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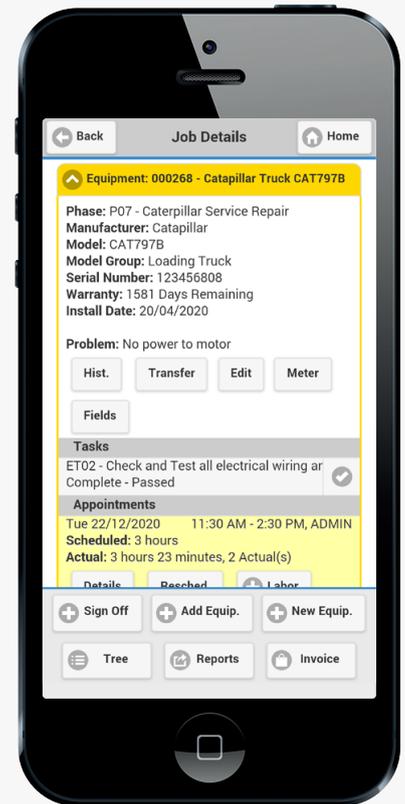
ADD LABOR / TIME ENTRIES

Add or record time for labor, travel, and misc. charges. Billable or Non billable (cost only) options. Team/crew time recording also available.



ADD PARTS

Add parts from inventory. Check quantity on hand. Serial number support. Scan part for quick entry. Multiple inventory locations (truck, warehouse).



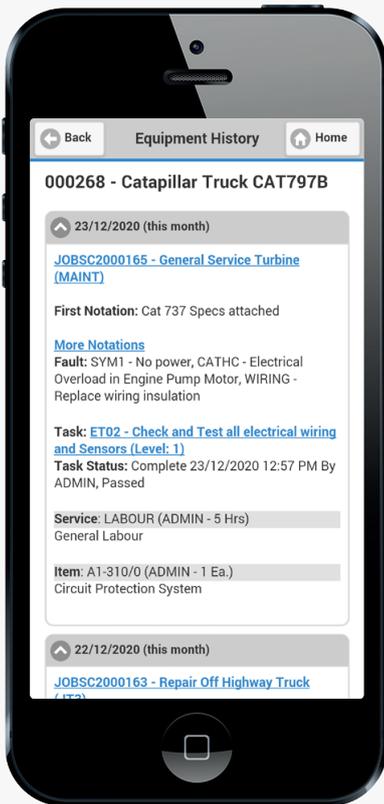
EQUIPMENT DETAILS

Check reported problem. Check location details. Look up history. View custom fields. Take meter readings. Transfer equipment. Add faults and solutions.

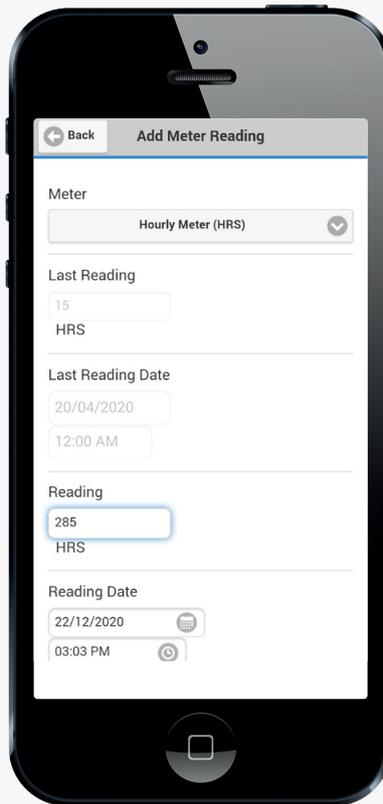


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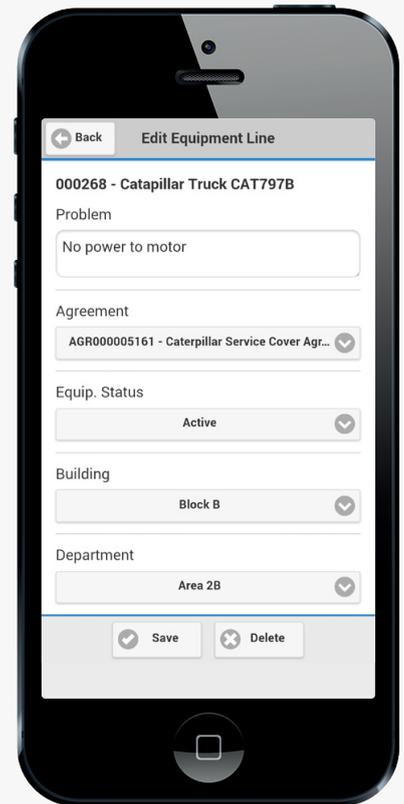
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EQUIPMENT HISTORY



ADD METER READING

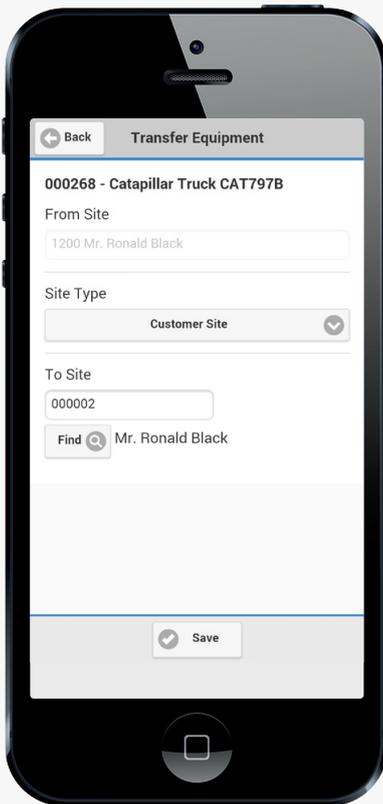


EDIT EQUIPMENT LINE

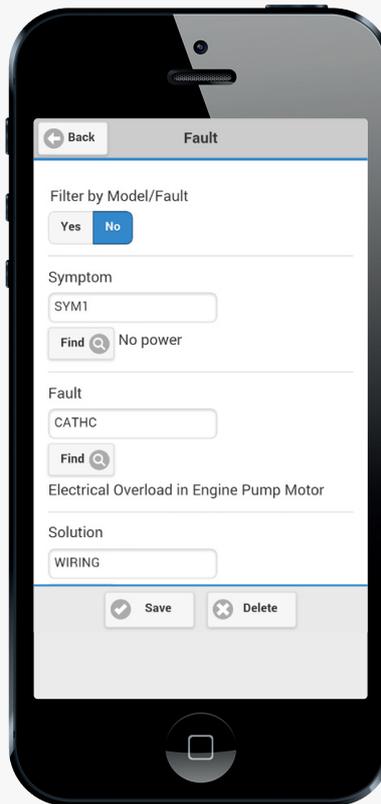
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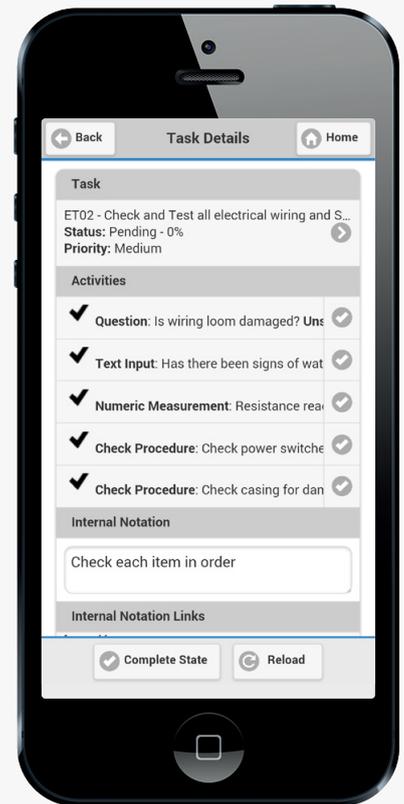
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TRANSFER EQUIPMENT



FAULT



TASKS

Complete tasks and activities (support for check procedures, measurements, questions, multiple choice text lists).

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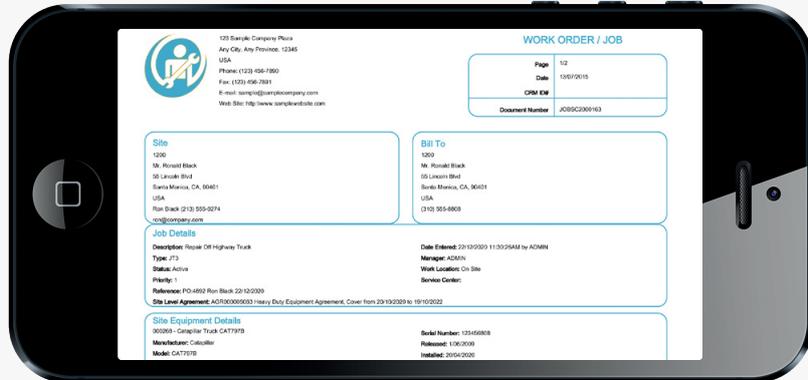
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SIGNATURE

Support for customer signatures.
Option to print on reports.



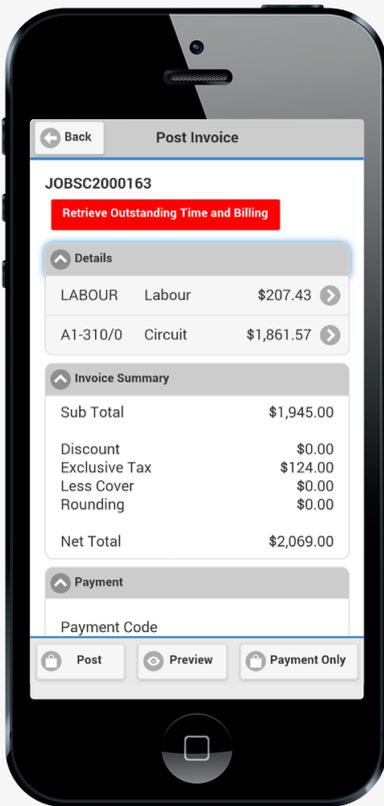
REPORTS

Customer Confirmation. Work Order.
Custom reports (unlimited). Email reports.
Print (output as PDF).

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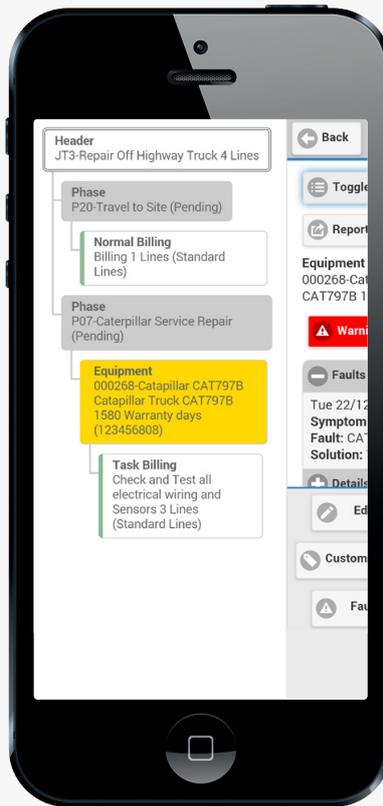
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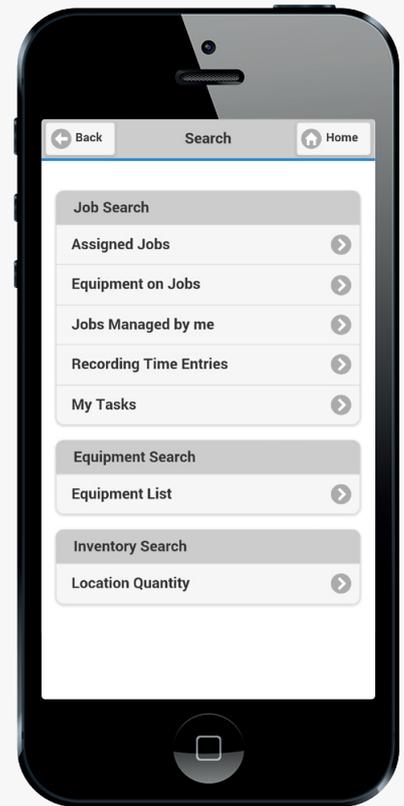
INVOICE AND PAYMENT

Preview invoice. Generate invoice.
 Collect payments/prepayments.
 Cash, check, credit card...
 View, email or print existing invoices.



JOB TREE VIEW

View the entire Job in detail.
 Phases, equipment, tasks, billing.



SEARCH

Search by date, site, equipment,
 serial number #, tasks, or recordings.
 Create custom searches.



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TECHNISOFT HAS YOU COVERED
NO MATTER HOW YOU CHOOSE TO
DEPLOY YOUR MOBILE SOFTWARE.

TECHNISOFT FIELD PORTAL APP
IS A SEPARATE PRODUCT TO FIELD
PORTAL, BUT THE GOOD NEWS IS
BOTH PRODUCTS ARE INCLUDED
IN THE ONE PRICE.

FIELD PORTAL APP RUNS ONLINE
AND OFFLINE VIA AN APP
INSTALLED ON THE DEVICE.

BOTH FIELD PORTAL AND FIELD
PORTAL APP SUPPORT iOS,
ANDROID AND WINDOWS DEVICES.

CHECK OUT THE COMPARISON
CHART TO COMPARE FEATURES.

(Please visit the Technisoft website for the
latest version compatibility.)

FEATURE	FIELD PORTAL AVAILABILITY	
	ONLINE	APP
Works Offline		✓
Full real time access to Sage/Service Manager	✓	
Fully Integrated to Service Manager	✓	✓
Fully Integrated to Advanced Scheduling	✓	✓
Central Configuration	✓	✓
Integrated Time Entry and Direct to Job Views	✓	✓
Items and Services using Sage 300cloud Inventory	✓	✓
Barcode Scanning for Equipment and Items		✓
Dispatch alerts and acknowledgements	✓	✓
Record Time	✓	✓
Team Recorder	✓	
Recorder Favourites	✓	✓
Click Contact telephone/email to launch	✓	✓
Update Document status/priority/reference	✓	✓
Management View to see all Jobs	✓	
Mapping	✓	✓
Notations	✓	✓
Email Notation details from device		✓
Upload/Download Photo Attachments	✓	✓
Upload/Download File Attachments	✓	
Custom Fields	✓	✓
Signatures	✓	✓
Finders	✓	✓
Simplified Job Detail Navigation		✓
Latitude/Longitude (Geo record position)	✓	✓
Create New Equipment	✓	
Full Equipment History	✓	
Basic Equipment Activity History		✓
Search Equipment	✓	✓
Equipment Location	✓	✓
Add Faults	✓	✓
Add New Tasks and Activities	✓	✓
Edit/Complete Task/Activities	✓	✓
Open Task Search		✓
Create New Jobs	✓	✓
Edit Existing Jobs	✓	✓
Create New Quotes	✓	
Edit Existing Quotes	✓	
Add Job related Time Entries	✓	✓
Edit Job related Time Entries	✓	✓
Add Non-Job Related Time	✓	✓
Edit Existing Non-Job Related Time	✓	✓
Edit Item/Service Description	✓	✓
Entre Meter Readings	✓	✓
Price Override	✓	✓
Cost Only	✓	✓
Time Sheet Actuals	✓	✓
Invoicing	✓	
Payments	✓	
Email or Print Reports and invoices	✓	



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PROGRAM AND HARDWARE REQUIREMENTS.
Service Manager 2020+ or above running with compatible Sage 300cloud 2020+ including Accpac.net Libraries | A Service Manager and Field Portal license | Windows Server 2016+ (optionally but not recommended Windows 10+) | IIS with ASP.NET 4.6+ | Requires current generation of phones, pads, tablets, netbooks and notebooks (iOS, Android, Win10+) | One Sage 300cloud Lanpak is required.