Sage Field Operations

Tailored software for service-based contractors, delivering simplicity in the field, precision in the office, and profit in your pocket.

Sage Field Operations is designed for specialty contractors with service technicians, including HVAC, electrical, plumbing, mechanical, refrigeration, fire protection, security/alarm, and many others. This solution arms field service teams with critical site details they need to improve productivity and deliver excellent customer service. Plus, you gain visibility into which business areas are most profitable with sophisticated business intelligence features.

- **Reduce risk** with access to real-time metrics such as average repair time, technician utilization, and customer satisfaction.
- **Increase profitability** by building estimates and work orders using precise costs for materials, and forecasting revenue and labor requirements months in advance based on dependable data and historical trends.
- **Cultivate a dependable revenue stream** by setting up and managing service and maintenance agreements.

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Simplify scheduling
Maximize technician utilization using real-time information of daily schedules and GPS locations.

Improve communication
Access inventory, enter daily logs, create work orders, all while on-site, ensuring timely project delivery.

Access business intelligence
Forecast revenue and labor requirements based on dependable data and historical trends, reducing risk.

Improve service rates
Check inventories and order materials using real-time availability, improving first-time fix rates.

“We have more insight into the profitability of our service business, and we have greater visibility into every aspect of our operation.”

— Jamie Pascucci, operations manager, Airstron Inc.

Simplify field service

Connect critical field and office processes to break down data silos to unite your entire business.

- Optimize your resources for demand and requirements, improving scheduling and crew management.
- Empower technicians with what they need to complete jobs right the first time.
- Reduce administrative tasks and streamline quoting, inventory, and invoicing for the field.
- Track where your technicians, inventory, projects, and invoices are at any time.

Streamline scheduling, work orders, and invoicing

Increase technician efficiency with automation, optimization, and planning.

- Balance work between resources and maximize utilization and demands to increase capacity.
- Build estimates and work orders using precise costs for materials, reducing guesswork, inaccurate quotes, and unexpected overruns.
- Easily manage maintenance agreements resulting in more accurate forecasting and scheduling.

Optimize field-to-office communication

Deliver frictionless field service to customers and staff so they can collaborate and make decisions faster.

- Distribute and manage work with the ability to receive, assign, track, and close out work in one place.
- Use checklists, photos, and forms to match your process requirements, ensuring you get all the information you need.
- Reduce risk, shorten job time, and provide proactive service by having all core workflows integrated in a single platform.

Scale your capabilities

Integrate seamlessly with Sage 100 Contractor, Sage 300 CRE, and Sage Intacct Construction.

- Gain insights with business intelligence features that enhance operations, identify trends, and forecast future resource requirements.
- Access a 360-degree views of leads, estimates, job costs, construction, and service operations for more comprehensive forecasts.

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Tiers

Sage Field Operations is available at multiple tiers. All tiers are supported with:

- Enterprise-grade security
- Data migration available
- GAAP compliance
- Cloud based-platform
- Free training and certification
- Sage finance integration

Basic
Access a comprehensive field service management solution to stay productive, efficient, and built for scale.

- Work order management
- Estimates + quotes
- Schedule + dispatch
- Forms + checklists
- Time + attendance
- Purchase orders + inventory tracking
- Invoicing
- Document storage
- Mobile application (Google & Apple)
- Standard support

Standard
Automate and customize workflows to streamline operations.

- Everything in Basic, and:
- Payroll management
- Flat rate pricing
- Customer portal + communication
- Digital payments
- Service agreements
- Custom fields
- Batch capabilities
- Multi-entity support

Enterprise
An enterprise solution to focus on customization, data insights, and driving revenue.

- Everything in Standard, and:
- Business intelligence
- Dedicated customer success manager

“We’ve automated many of the steps that were time-consuming and manual. With more information and tools in the hands of our techs, our productivity has improved, as has the overall level of our service.”

— Jamie Pascucci, operations manager, Airstron Inc.

Sage Accordant

Join over 50,000 construction companies who trust and rely on Sage.

Accordant

Creating harmony between people, business, and technology. Accordant is a Platinum Sage Business Partner, supporting over 5,000 clients since 2005. We know software, and the industries we support.

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Sage

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