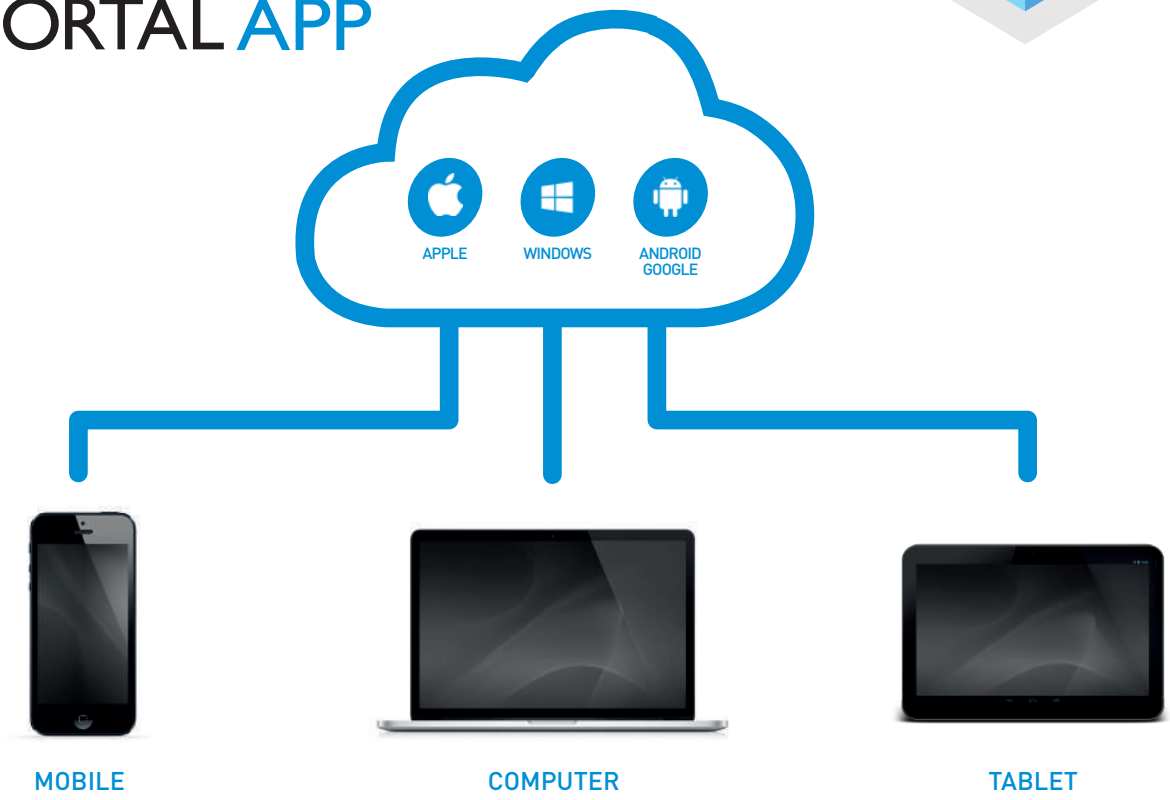
FIELD PORTAL APP



Enhance your communication link between the field and mission control.

Get FIELD PORTAL APP today.

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

YOU'RE RUNNING SAGE 300 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 APP 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.

Technisoft FIELD PORTAL APP keeps your technicians working even when they don't have internet, Wifi or mobile cell coverage.

A technician can sync their data and gain access to their Service Manager appointments and job details online or offline via a simple to use interface.

The central configuration point of Field Portal App means that settings are updated once and deployed to all devices.

FIELD PORTAL APP is a software application that fully integrates with Sage 300 and Service Manager®.

Technisoft®

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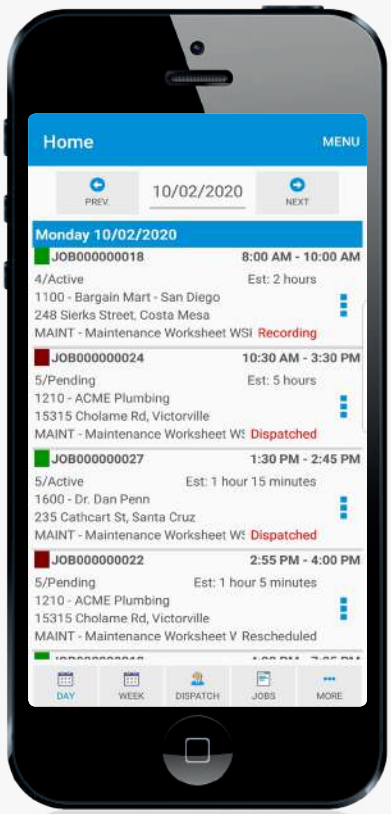
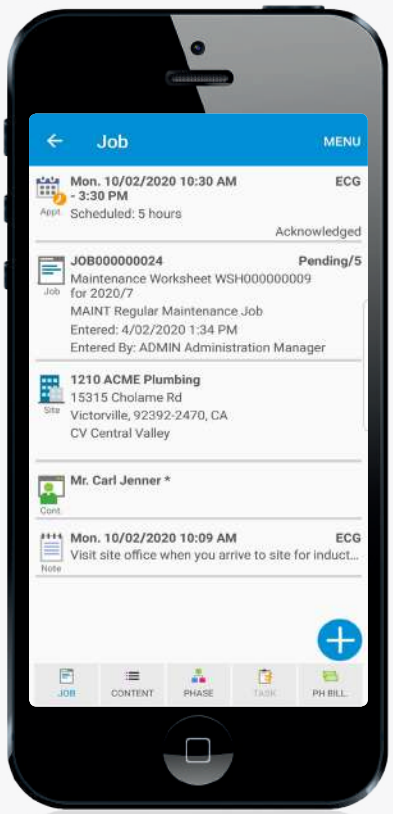
FIELD PORTAL APP



DAILY / WEEKLY SCHEDULE

View schedules, assigned job dispatches. Start recorder.



JOB DETAILS

Edit or review job details. Click customer address to launch map. Click customer to phone or email.

EQUIPMENT DETAILS

Add and view equipment. Register equipment problems with symptoms, faults and solutions.

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Contact details below for up-to-date information on Technisoft products.
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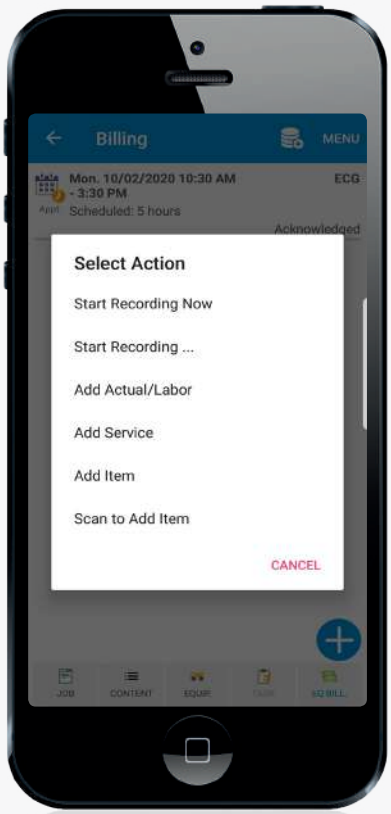
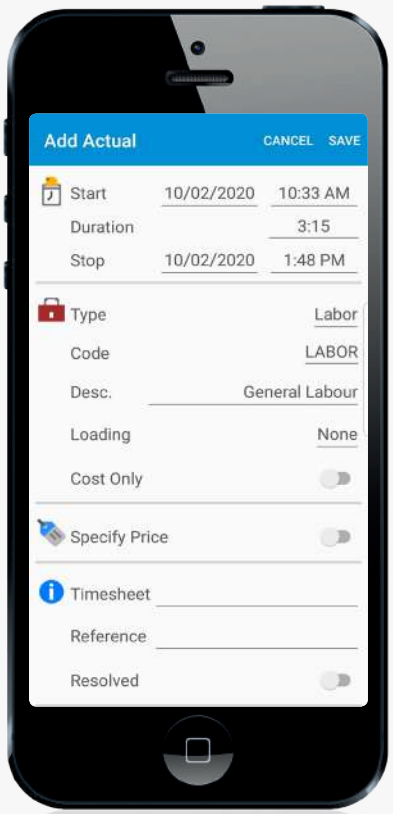
FIELD PORTAL APP





TECHNISOFT FIELD PORTAL APP ENSURES ACCURATE RECORDS ARE KEPT FOR EACH SITE VISIT WHICH, HELPS TO PROVIDE AN EXCELLENT EXPERIENCE FOR THE FILED WORKER AND CUSTOMER.

ADD ITEMS AND SERVICES

Scan barcode or lookup to add parts from inventory. Check location and quantity on hand. Serial number support.

ADD LABOR / TIME ENTRIES

Add time for labor, travel and misc, charges. Billable or cost only options.

Record time and use favourites to quickly add labor or travel times.

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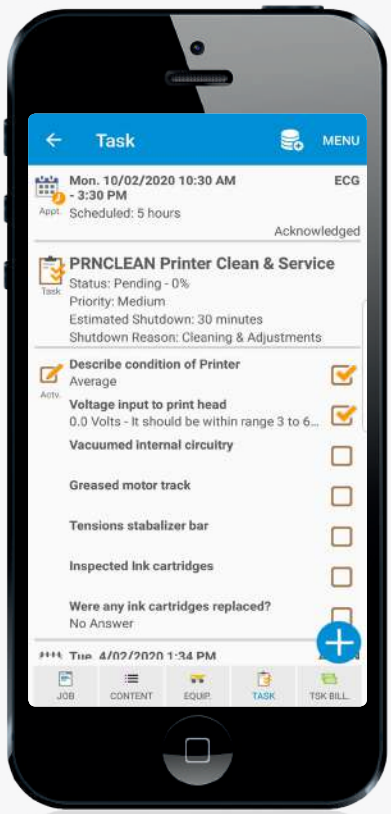
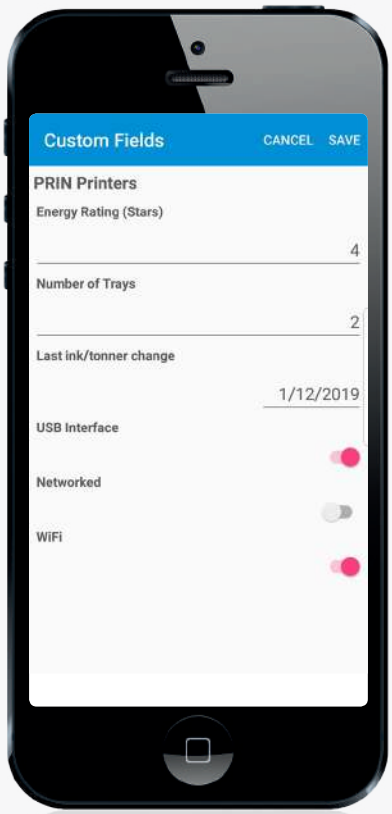


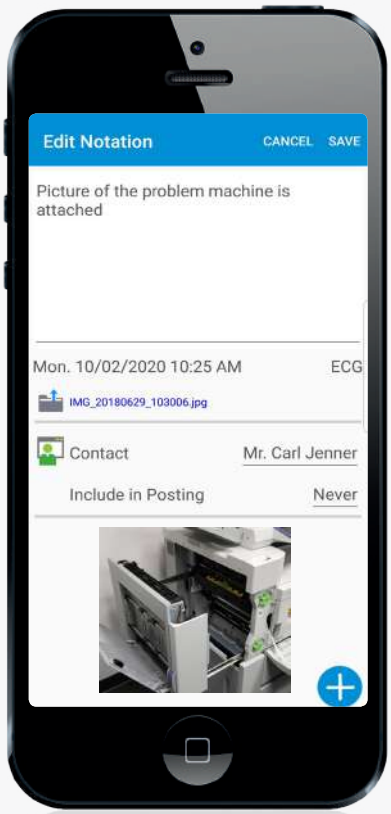
TASKS

Perform and complete tasks and activities.



CUSTOM FIELDS

View and edit custom fields for document, equipment and site records.



NOTATIONS AND SIGNATURES

Enter new notations. Upload photos. View existing notes and attachments.

Support for customer's signatures.

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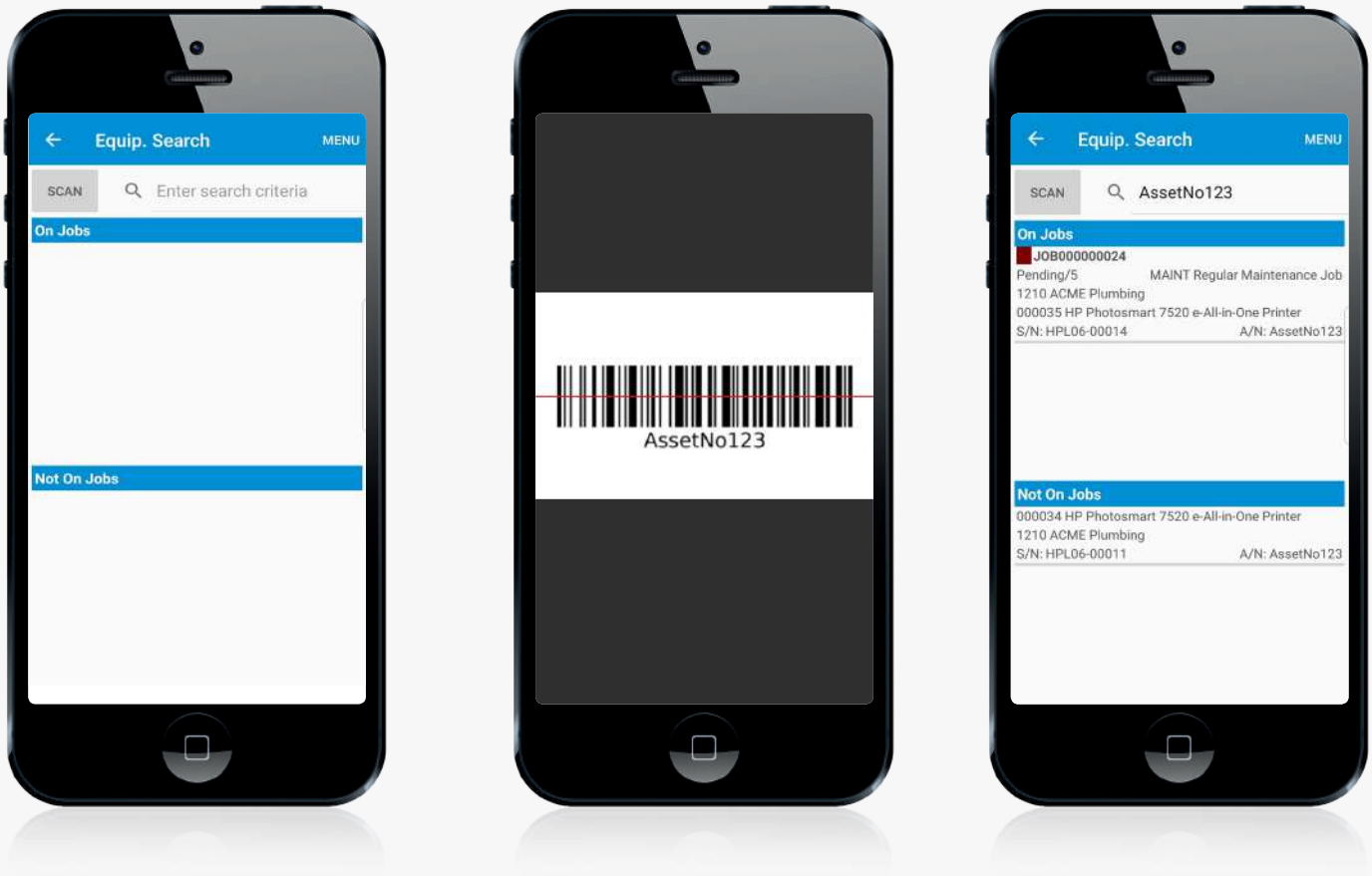

BARCODE SCANNING

Scan barcode's to search equipment records and add equipment to a job or to find the job the equipment is on.

Scan item lines from the Tech's truck to add them to a job. Supports multiple quantites and serialized inventory.

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FIELD PORTAL APP

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 10 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 300 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		✓
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 Non-Job Related Time	✓	
Edit Existing Non-Job Relate Time	✓	✓
Edit Item/Service Description	✓	✓
Entre Meter Readings	✓	✓
Latitude/Longitude (Geo record position)	✓	✓
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 2017+ running in Sage 300 2017+ | A Service Manager license with the Field Portal add-on (includes 5 users) | Windows Server 2002 or 2016+ (Windows 10) | IIS with ASP.NET 4.6 (e.g. full installation of .net 4.6 required) | Sage 300/Accpac.net Libraries with version corresponding to the version of Sage 300 installed | Requires current generation of phones, pads, tablets, netbooks and notebooks (iOS, Android, Win10) | One Sage 300 Lanpak | Support for MS SQL Server Database only