

# FieldConnect



## I FieldDirect

FieldConnect's FieldDirect is a secure, web-based, customer self-service call creation portal that empowers your customers with 24/7 access to real-time service call information, building loyalty while reducing service delivery costs.

### Empower your customers

In today's competitive environment the customer is king. Without their loyalty, reference-ability and repeat business no company can survive. Achieving this today requires better response from field service organizations. FieldDirect automates the "last mile" between your customers and your corporate service management database.

### Specifically FieldDirect allows you to:

- **Eliminate inbound status calls:** You can no longer tolerate the volume of customer calls for service status. You need to securely provide instantaneous access to status for your customers' service status requests 24/7.
- **Ease Dispatcher Duties:** You can no longer afford dispatchers playing telephone tag with your customers. You need to have real-time communications of service call status between your customers and the dispatcher.
- **Enhance Customer Satisfaction:** An unhappy customer is expensive and can even lead to loss of business. Ensuring prompt and complete response to service calls improves satisfaction ratings.

### FieldDirect delivers immediate value to any field service organization:

- **Strengthen Customer Loyalty:** Deliver superior customer service with 24/7 access to all service information; eliminate calls and waiting on hold for status. Increase Service Revenue: Drive return visits with ease of use and free dispatchers from routine inbound calls allowing more time with customers looking to spend money.
- **Gain a Competitive Advantage:** Self-service interface reduces costs while real-time information improves customer satisfaction.
- **Customer Portal Made Simple**  
You can integrate the FieldDirect solution easily into your current customer portal or use it as a new stand-alone value-added service for your customers, enabling self-service on status checking of field service requests or opening new service requests.

FieldDirect has enabled our company to provide a level of communication and transparency for our customers that separates us from the competition. Now, when I communicate our effectiveness as a service provider to a potential or existing customer FieldDirect enables me to support that claim by providing real time access to the customer's sites and work requests.

Thank you,

Jim Salamone  
Precision Mechanical Contracting



FieldConnect  
Service Platform

FieldAccess ● Mobile Technician

FieldTime ● Payroll

FieldDispatch ● Dispatching

FieldQuotes ● Quoting

FieldDirect ● Customer Portal

FieldLocator ● GPS Fleet Tracking

For more information about FieldConnect products:  
Call. 1.949.428.1540 Click [www.fieldconnect.com](http://www.fieldconnect.com)

## FieldDirect Features

**Customer Service Portal:** At-a-glance access to all service calls with ability to filter by open, closed or invoiced; can view site description, call type, location, date/time promised and call status

**Open New Service Calls:** Users responsible for multiple sites can look up by company name, site name or postal code; ability to set service call priorities and display customer name, site name and contact along with service call information and problem codes

**Security:** Setup users to access one or multiple sites; access rights determined at login and ensure information privacy and security

**Document Management:** Easily manage private and public folders for information accessible to users with appropriate privileges

**User Management:** Associate user with group and define group privileges for information access; can also define group responsibilities across multiple sites

**Connectivity:** Via any internet connection

**Reporting:** Flexible search capabilities with ability to select reports for single or multiple sites for display, print, email or export to MS Excel

### Implementation is a Snap

FieldDirect has a proprietary link to Microsoft Dynamics (AX, GP, SL, or NAV), Sage 300CRE, and Sage 300TS (formerly Timberline) software to facilitate fast and secure real-time communications between your field technician and the service management database. FieldDirect can be easily and seamlessly installed into an existing environment, connected and setup, typically in a matter of hours.

### Broad Range of Device Support

FieldConnect is absolutely device-agnostic, so it can be accessed on a wide range of devices: Smartphones, tablets, laptops. Essentially, if the device can access the Internet, it can access FieldDirect.



| Number            | Client                       | Site                     | Status    | Date      | Technician    | Client    |
|-------------------|------------------------------|--------------------------|-----------|-----------|---------------|-----------|
| Detail: VM0000009 | Apex Sports                  |                          | ASSIGNED  | 2/13/2013 |               | 2/13/2013 |
| Detail: VM0000007 | Apex Sports                  |                          | ASSIGNED  | 2/13/2013 |               | 2/13/2013 |
| Detail: VM0000005 | Tom Toubey                   |                          | ASSIGNED  | 2/13/2013 |               | 2/13/2013 |
| Detail: VM0000003 | Kudrinsky Community Hospital |                          | COMPLETED | 2/5/2013  | BROWN, J      | 2/5/2013  |
| Detail: VM0000002 | Kudrinsky Community Hospital |                          | COMPLETED | 2/6/2013  | BROWN, J      | 2/6/2013  |
| Detail: VM0000001 | Stella Service               | Preventative Maintenance | COMPLETED | 2/5/2013  | BROWN, J      | 2/6/2013  |
| Detail: VM0000000 | Fabulous, Inc.               |                          | ASSIGNED  | 2/5/2013  | BROWN, J      | 2/6/2013  |
| Detail: VM0000048 | KCV vineyards                |                          | ASSIGNED  | 2/6/2013  | JONES, J      | 1/22/2013 |
| Detail: VM0000047 | Fabulous, Inc.               | Heating                  | ASSIGNED  | 1/22/2013 | ANKUS, DM     | 1/22/2013 |
| Detail: VM0000046 | Starbucks                    | Light duty repair        | ASSIGNED  | 1/22/2013 | HICKMAN, J    | 1/22/2013 |
| Detail: VM0000044 | Starbucks                    |                          | NEW       | 1/21/2013 | NAUSSAHLAN, J | 1/21/2013 |
| Detail: VM0000043 | Starbucks                    | Light duty repair        | COMPLETED | 1/21/2013 | NAUSSAHLAN, J | 1/21/2013 |
| Detail: VM0000042 | Starbucks                    |                          | NEW       | 1/18/2013 |               | 1/18/2013 |
| Detail: VM0000041 | Starbucks                    |                          | NEW       | 1/18/2013 |               | 1/18/2013 |

### Requirements and Dependencies

Microsoft Dynamics GP version 8.0 or later,  
Microsoft Dynamics SL version 7.0 or later;  
Microsoft Dynamics AX 2012; Microsoft Dynamics  
NAV 2013; Sage 300 Construction & Real Estate,  
Sage 300 Trade Specialty; ASP .NET, IIS 6.0, and .NET  
Framework 2.0 SP1

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