FIELD SERVICE EDITION

Field Service & Trades

Installed equipment, service contracts, scheduled jobs and site visits.

For service businesses with technicians on the road — HVAC, electrical, plumbing, security, equipment maintenance. Installed equipment at customer sites, service contracts and renewals, jobs with labour and parts, checklists, and location-stamped site visits — invoiced straight from the job.

WHAT IT RUNS

- Installed equipment register by customer site
- Service contracts and renewals due
- Service jobs with labour and parts lines; jobs by status
- Checklists for each type of visit
- Technician day list and site visits stamped with location
- Stock items and the stock ledger

THE APPS

Staff system
for service manager, technicians, office admin
the office and the van

Customer portal
for customers
their service jobs, equipment, requests and news

WHO SIGNS IN

Service manager · Technician · Office admin

STANDARD IN EVERY EDITION

One set of books
Ledger, cashbook, sales, purchases and assets — shared by all

Every view audited
Who saw what, and when, on every record

Signatures & retention
Electronic signatures, records retention and legal holds

The AI Clean Gate
Every photo and post checked before anyone sees it

Messages & notices
Feed, calendar, two-way messages and self-registration

> “The customer sees the job booked, the technician on site, and the invoice — in that order.