



FIELD SERVICE SOFTWARE DESIGNED FOR THE HVACR INDUSTRY

The Company

Fieldpoint develops software applications to manage the complete lifecycle of HVACR and industrial equipment service, from quotes, large-scale installation jobs, maintenance agreements, and emergency repairs, to drive productivity gains for HVACR enterprises. Our specialized integration with CRM, ERP and accounting systems provide our customers with enterprise visibility, while streamlining sales and service operations. With over 25 years of experience, over 750 valued customers, and a solid network of reselling partners, Fieldpoint enables service organizations to run leaner, smarter and more profitably. For more information about Fieldpoint and their service management software applications, please visit www.fieldpoint.net or call 1 (866) 336-5282.

The Fieldpoint Product

In the competitive field of HVACR, your field service management holds the key to operational excellence and long-term business growth. Enable your business to differentiate their service and open new revenue streams with real-time and mobile field service technology. Fieldpoint offers a flexible and scalable HVACR field service software platform that connects to your customers and their equipment, integrates with your existing systems, streamlines operations, and empowers your HVACR technicians.

Fieldpoint Functionality — How It Contributes to HVACR Enterprises' Success

The system integrates with your existing CRM system that synchronizes your customer profiles, employee information and inventory levels, and features a sophisticated quoting tool that creates and customizes proposals, quotes, and estimates for your HVACR customers. The unified platform allows you to schedule, dispatch and route your technicians quickly and efficiently, while being able to search, and organize work orders from the initial call to completion.

Fieldpoint has a native mobile field service app that instantaneously sends HVACR field service work order information to and from smartphones, tablets, and laptops, giving technicians and subcontractors access to work orders from the field. With our advanced HVACR checklists configurator, it's possible to create customized and automated checklists in the office, which are then synched to the mobile device so technicians can follow and document procedures or collect data while on-site. This keeps your technician's workflow consistent and standards high for every service call.

Through the contracts module, you can set up flexible preventative maintenance contracts, warranties, and service level agreements, and reference them to work orders. Ensure no service call in a contract is missed with automated work order creation that is ready for scheduling with all applicable information, checklists and parts needed to complete the job.

HVACR service enterprises are increasingly using subcontractors, freelance resources, and third parties to deliver services to their clients, so Fieldpoint has built in subcontractor software within the core product which helps service managers manage and monitor third-party vendor activities. This allows you to grow your organization's pool of qualified technicians by expanding beyond your own employees and into the third-party work market.

There is comprehensive project management functionality to ensure on time and on budget delivery of complex installation projects. Projects are more manageable with Fieldpoint's resource manager, as planning jobs within a project, securing required resources, and equipment needed to complete the project, is all done within a Gantt-style chart for clear visibility into the progress of the project.

Fieldpoint offers out-of-the-box integrations to systems like Microsoft Dynamics GP, NetSuite, Intacct, QuickBooks, WorkMarket, Service Channel and more, and through the Fieldpoint Data Transfer Service, you can seamlessly integrate to other software your organization relies on. This allows for streamlined communication between all the systems you use to make your HVACR enterprise successful.

With the Business Intelligence module, our clients can get access to dynamic reporting of key targeted indicators for your business. Enterprises can drill down on service trends and profit margins by region, office or salesperson, and customize targets based on the individual department to get a better view of the business, and to make more informed business decisions.

The Management Team

Rich Smart, President

Rich has 25 years experience in the field services and job costing software industry. This is his second published application to the HVACR marketplace. Rich has been involved in the automation of over 1,500 field service enterprises in his career. Rich has a Bachelors of Commerce, and is actively involved in product management across multiple verticals and channels.

Phil Smart, CTO

Phil co-founded Fieldpoint Service Applications in 2000 when he identified the need for a combined web-based field service and project services automation tool. With a background spanning over 25 years, Phil has led the development and support of three commercial field service applications from inception to wide-spread commercial use. Phil's experience drives Fieldpoint's growth strategy and motivates him to grow the Fieldpoint team. Phil has an Honors Bachelor of Commerce degree and is actively involved in technology decisions and product direction. His passion for delivering outstanding customer service and excellent end user experience can be found throughout the Fieldpoint team.

Mike Mance, VP Business Development

Mike brings more than 25 years of leadership expertise in the field service and ERP software marketplaces. Mike is a seasoned product leader who has had many sales and marketing roles within Fieldpoint, and enterprise software vendors SAP and Oracle. The combination of ERP supply chain experience and working with hundreds of field service implementations over the years, allows Mike to be a champion for enterprise service organizations. Mike is constantly working with Fieldpoint customers, developers, and implementation teams to offer service management applications that are full featured, easy to use, and customized for specific service industries. More recently, he has been working on promoting Fieldpoint's API technology to provide seamless integration to third party applications, tying customer, subcontractor, and employee data communications closer together.

Greg Garritsen, Sales and Channel Manager

Greg is responsible for delivering comprehensive and well-integrated service management solutions to the global HVACR services marketplace. He brings years of experience in enabling organizations to streamline all service-related facets of their businesses — all using Fieldpoint's leading-edge field service and project software suite. With involvement in the sale and implementation of hundreds of successful system deployments, Greg's thorough understanding of professional services complexity and enterprise technology empowers his clients to operate at the forefront of their respective practices.

Recent Press Releases

FINANCES ONLINE DIRECTORY RECOGNIZES FIELDPOINT WITH TWO FIELD SERVICE MANAGEMENT SOFTWARE DISTINCTIONS

While we at Fieldpoint are looking towards the future, we are honored to be selected for two of Finances Online 2017 Awards for our field service software. The popular B2B software review platform has recently reviewed Fieldpoint's end-to-end field service software solution. Along with a 100% user satisfaction rating and landing a spot in its esteemed top 10 field service systems list, Finances Online gave Fieldpoint an 8.0 score based on their Smart Score system that provides users with a holistic overview of a product's elements based on aspects such as ease of use, main functionality, and more.

It helped earn Fieldpoint the Rising Star award, given to SaaS products that have received good traction with customers due to its well-designed functionalities. Fieldpoint also received the Great User Experience award for top field service software, granted to products that offer especially good user experiences. Finances Online evaluates how easy it is to start using the product and how well-designed its interface and features are to facilitate the work process.

Fieldpoint offers a web-based field service software for enterprises in the HVACR and refrigeration services, IT services, facilities management, oil and gas, medical devices, fire and life safety, and security systems spaces. With built-in integrations through Fieldpoint's Data Transfer Service, our field service management software aims to be an end-to-end solution for any field service organization. We have out of the box integrations to Microsoft Dynamics GP, NetSuite, Intacct and many more. Our interface offers service managers a wide breadth of information and options, from work order management to scheduling and dispatch options and contract management. Along with Fieldpoint's mobile field service app, the entire software is designed to make field service easier, more efficient, and make technicians and subcontracts more productive.

These two awards are a culmination of hundreds of hours of work by the Fieldpoint team that delivers a unique software for field service organizations. Fieldpoint offers hands-on training with our team of consultants and tailor fits our field service software to your organization's needs, implementing the solution that is best for your business in order for it to meet your goals.

Looking forward, Fieldpoint continues to push for greater use of our mobile field service app, adding IoT technology, and making our software more user-friendly. But we always want to ensure that our customers are making their customers satisfied and that our field service management software is a contributing factor to their overall success.





FIELDPOINT ANNOUNCES NEW UPDATES TO THEIR LEADING FIELD SERVICE MOBILE SOLUTION

OAKVILLE, Ontario, August 28, 2017 — Fieldpoint customers can now enjoy improved customer satisfaction, efficient technician utilization and better enterprise service delivery with Fieldpoint's updated mobile field service app, advanced checklisting, scheduling and troubleshooting features.

With a myriad of new features that help to substantially automate workflows and streamline business processes, Fieldpoint's new advance checklisting functionality comes with an updated interface that allows your technicians to progress quickly through required checklists, using nested and smart questions to not only organize your templates, but to also make sure that the technician's lives are made easier and they don't miss any procedural steps.

These nested questions provide a way to trigger further actions, information fields or questions from responses, and gives technicians the ability to follow workflows within a template. Field service mobile checklists are not just a list; they're dynamic, meaning that if a technician answers a certain question a certain way, then the checklist will adjust and show them the next step as it correlates to their previous answer.

"With Fieldpoint's latest mobile checklist enhancements, we have come the closest yet to delivering the ultimate 'to do list.' Our HVACR, high tech, medical, and fire and life service customers all use checklists to boost efficiency and reduce mistakes," says Mike Mance, CMO, Fieldpoint Service Applications. "We have set a new standard in workforce mobility with a highly intuitive interface and powerful features to carry out service knowledge and experience and apply it effectively."

Service managers can now create, define and modify these checklists using an effective drag and drop tool to make sure that the technicians and subcontractors are following quality control and troubleshooting procedures and can create sales quotes right from the checklist. They can also generate business analytic reports from the checklists, going into as much or as little detail as they like.

These new features can be coupled with the ability to assign checklists to a specific piece of equipment on a work order, ensuring your technicians have the proper checklist for the right piece of equipment — as well as required fields that prompt action by a technician to close out the work order, ensuring that proper procedures and inspections are followed.

What Do Our Customer's Say About Us?



"By using Microsoft Dynamics and Fieldpoint's service management, our accounting and service staff can work more efficiently and provide even more value to our customers – and ultimately our business."

– Tom Hitchman, President, Naylor Group Inc.



"Fieldpoint has helped us automate and streamline our paper-based processes, creating greater visibility for both our technicians and customers and eliminating the risk of lost paperwork and missed service calls."

– Jeff, ISA



"We have found the Fieldpoint product to be very flexible and able to mold to our ever-changing needs. The service management system integrates to our sales tax automation and provisioning / circuit inventory tracking systems. It handles complex invoicing for recurring billing of parts and labor."

– Thomas Swayze, CTO, NetFortris



"In real-time, you can see where they are as far as the size of the job and what they're working on. In situations where the technician goes out and does a preventive maintenance job and realizes that it needs additional work done to it, we'll be able to be more responsive to that now."

– Brian Donahoe, Information Technology Manager, Kraft Power



"Through Fieldpoint's intuitive integration platform we are now bi-directionally connected with our primary workforce management partner. We have had a great experience with the Fieldpoint implementation consultants, and are very pleased with the design and level of integration achieved."

– John Walpuck, CFO/COO, CRI