

Field Service and Financial Management Excellence

MobiWork's Sage Intacct integration seamlessly connects your field service operations with your accounting and financial management, creating a streamlined workflow across your business, eliminating silos and providing a foundation for growth:



- Enable a seamless data exchange between the field and the back office to ensure total financial and operational alignment
- Eliminate manual data entry and redundant administrative tasks to drastically reduce errors and overhead
- Accelerate execution time by automating the flow of work orders, parts, and labor directly into your financial workflows
- Gain real-time visibility into project profitability and costs, allowing for more informed decision-making and faster billing

The result is enhanced efficiency, shorter billing cycles, reduced operational costs, and peak organizational performance.

Integration Points: Records

The diagram below provides an overview of the key records that are integrated between the two platforms:



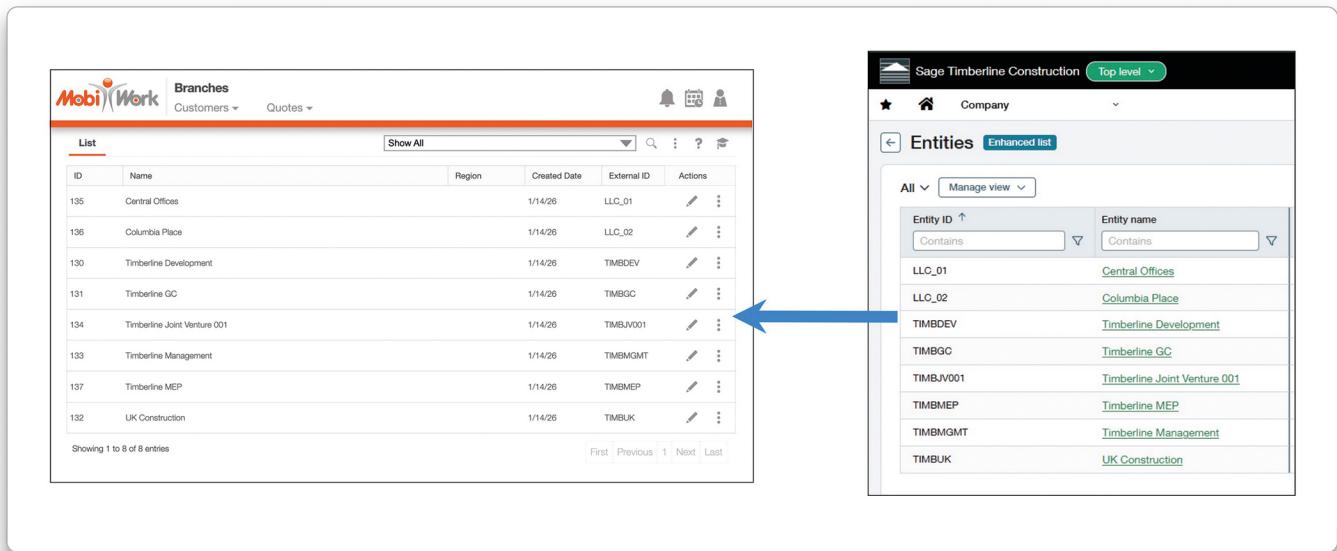
Integration Points: Transactions

The diagram below provides an overview of the key transactions that are integrated between the two platforms:



Sage Intacct Entities and MobiWork Branches

Sage Intacct uses entities to represent different business units, regions, or subsidiaries (e.g. East Coast or West Coast) which makes it very easy to organize, scale and grow your business (e.g. add-on acquisitions). The MobiWork Sage Intacct connector automatically discovers your entities in Sage Intacct and creates matching branches in MobiWork:



The screenshot shows two side-by-side lists. On the left is the MobiWork 'Branches' list, showing a table of branches with columns for ID, Name, Region, Created Date, External ID, and Actions. On the right is the Sage Intacct 'Entities' list, showing a table of entities with columns for Entity ID, Entity name, and Actions. A blue arrow points from the MobiWork list to the Sage Intacct list, indicating the automatic mapping and synchronization of data between the two platforms.

ID	Name	Region	Created Date	External ID	Actions
135	Central Offices		1/14/26	LLC_01	...
138	Columbia Place		1/14/26	LLC_02	...
130	Timberline Development		1/14/26	TIMBDEV	...
131	Timberline GC		1/14/26	TIMBGC	...
134	Timberline Joint Venture 001		1/14/26	TIMBJV001	...
133	Timberline Management		1/14/26	TIMBMANAGMT	...
137	Timberline MEP		1/14/26	TIMBMEP	...
132	UK Construction		1/14/26	TIMBUK	...

Entity ID	Entity name
LLC_01	Central Offices
LLC_02	Columbia Place
TIMBDEV	Timberline Development
TIMBGC	Timberline GC
TIMBJV001	Timberline Joint Venture 001
TIMBMEP	Timberline MEP
TIMBMANAGMT	Timberline Management
TIMBUK	UK Construction

From that point on, any transaction created in MobiWork (such as an invoice, payment) is sent to the matching Sage Intacct entity.