



# FIELD SERVICE MANAGEMENT

## MAINTAIN A REAL-TIME VIEW OF YOUR CUSTOMER'S ACTIVITIES ACROSS ALL YOUR OPERATIONS

The Acumatica Service Management delivers a complete set of functionality for field service operations. Streamline processes to reduce response times and costs, resulting in increased revenues and customer satisfaction that ultimately give you a competitive advantage.

- Optimal Route Planning** – Optimize routes for appointments with the ability to filter appointments by several different criteria. Routes are plotted in Google Maps for each service person with lists of required resources (equipment or machine). Graphical displays show the routes and order status with different colors, enabling dispatchers to rapidly respond to problems and make route changes. Routes are designed to minimize drive time and changes to the route are instantly redrawn and available on the field technician's mobile device.
- Inventory Management** – In field services, tools and repair parts are typically spread across multiple vehicles and warehouse locations. With Acumatica, you can control and track these locations and costs. Since inventory and purchasing are integrated, replenishment orders can be sent to a specific location and, when the parts arrive, the dispatcher can schedule the service appointment for installation.
- Service Contract Management** – Recurring service contracts are a significant source of revenue. Visibility on renewal dates for each contract helps preserve the revenue. Dashboards can alert the service team of expiring contracts. Your team can create and manage multiple service schedules per customer and fine-tune appointments using the Schedule Calendar Board for staff and resources.

## KEY BENEFITS

### EXPEDITE ASSIGNMENTS

- Quickly capture service needs and access customer information, product history, and resources
- Shorten the time between call receipt and job assignment

### TRACK RESOURCES

- Track resource commitments.
- Match tasks to best available resources
- Generate work orders automatically

### OPTIMIZE SCHEDULES

- Schedule the right people at the right time with the right skills to perform work
- Use the field services calendar scheduling board to create daily or weekly schedules automatically or use the convenient drag-and-drop tools

The screenshot shows the Acumatica Service Management interface. At the top, there's a navigation bar with 'Acumatica' logo and menu items like Organization, Finance, Service, Distribution, Configuration, System, and Help. Below that, a 'Service Management' header is visible. The main content area is titled 'Appointment Calendar Board' and features a search bar and a table of service orders. The table has columns for Service Order, Qty, Customer, Branch Location, Main Location, Appointment, and Resource. The calendar grid below the table shows time slots from 9:00AM to 20:00PM, with various service orders and resource assignments represented by colored blocks and icons. A sidebar on the left contains a navigation menu with categories like 'Enter', 'Boards and Map', 'Manage', and 'Explore', each with sub-items.



### FIELD SERVICE MANAGEMENT FEATURES AND CAPABILITIES

#### Mobile Service Management

Keep your staff members connected through any browser-enabled device or using the native mobile Android and Apple iOS (iPad) app. Offer staff access to service information and customer data from anywhere at any time. Acumatica runs on the entire spectrum of mobile devices, important for companies using laptops rather than small devices like phones.

#### Emergency Service Calls

Use visual tools to add unplanned service calls. Find out how changes to planned routes will affect the team with the least amount of impact to the planned schedule. Have the new service order sent to the technician's mobile device.

#### Equipment Maintenance

Record the history of equipment or machines installed at each customer site and track repair parts in stock. Acumatica stores the equipment records from quoting through order, delivery, installation, and service work in the field. Information includes manufacturer, model, configuration, and scheduled preventive maintenance orders. Customer equipment can be associated to recurring schedules and contracts in Acumatica Customer Management (sold as an optional application).

#### Warranty Management

Establish warranty offers for your customers, specifying which parts are under warranty to avoid confusion, mischarges, and objections. Multidimensional contracts (different warranty periods for different components of the system) help to track warranties from sales to repair in the field, specifying what is covered and what is not. This helps ensure billing accuracy and improve customer satisfaction.

#### Dashboards and Business Intelligence

Create personalized dashboards easily and turn raw data into rich visuals to track progress and spot trends as they happen. Acumatica's business intelligence can also leverage Microsoft Power BI to deliver insights from multiple data sources that are key to your business.

#### Team Approach to Sales and Service

Customer Management (CRM) is part of Acumatica, not a loosely integrated module. From marketing, quoting, bidding, to installing and field services, the customer information is visible throughout the organization providing a 360-degree field of all customer interactions. When selling equipment, the installation appointment can be scheduled while the user is in order entry. (Customer Management is sold as an optional application.)

#### Track Project Costs

Field Service Management is not just for small projects. When the installations are very large (tasks, people, or equipment), all the costs (time, materials, and expenses) of each phase of the project are tracked in Acumatica Project Accounting (sold as an optional application). Compare actual project costs with original and revised budgets in real time.

### THE ACUMATICA ERP DIFFERENCE

Acumatica delivers a full suite of integrated business management applications unlike any other ERP solution on the market today.

#### STREAMLINE OPERATIONS

**Manage your business more efficiently:**

- Automate processes
- Control workflows
- Access the system from anywhere on any device—including mobile
- Promote collaboration with all-inclusive user licensing

#### ADAPTABLE SOLUTION

**Add and extend:**

- Deploy in-house or in a private or public cloud
- Easily configure your solution to fit your needs
- Add capabilities such as CRM or data visualization at any time
- Extend to other solutions and applications beyond ERP

#### YOUR BUSINESS ACCELERATED

**Get a single version of the truth:**

- Accelerate business performance and make smarter decisions with automated processes, real-time data collection, financial analyses, and forecasting
- No per user pricing – system scales as your business grows