



# 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 door companies. Streamline processes to reduce response times and costs, resulting in increased revenues and customer satisfaction that ultimately give you a competitive advantage.

- Optimal Service Planning** – Optimize routes for service calls 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



### 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



# ACUMATICA CLOUD ERP PRODUCT OVERVIEW

## **FLEXIBILITY AND CHOICE IN A SINGLE, COMPREHENSIVE SOLUTION TO MANAGE YOUR ENTIRE BUSINESS EFFICIENTLY**

Acumatica is the only cloud- and browser-based ERP solution that adapts to the needs of growing small- and mid-sized businesses (SMBs) economically and securely.

**Adaptable.** Spans a broad variety of industries, including Distribution, Manufacturing Retail/eCommerce, and Services (Professional, Business, Repair, and Not-for-Profit).

**Seamless.** All Acumatica application suites are web-based, integrate fully with one another, and use a centralized database.

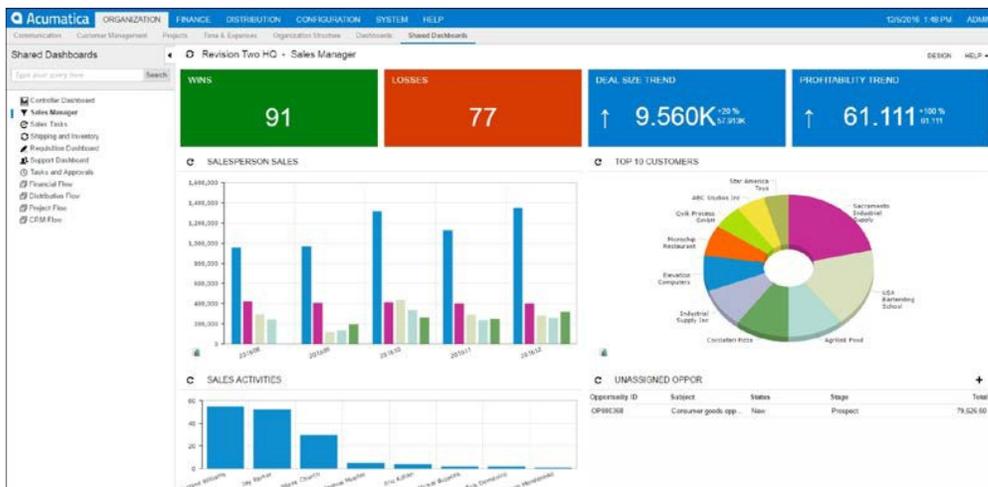
**Intuitive.** The user interface and navigation—with tablet-friendly design and dynamic page layout—make working on any device fast and easy.

**Collaborative.** Integrated Document Management allows you to manage a central repository of documents and media.

**Automated.** Rules for workflows and approvals, which help maintain control, can be created throughout the system (e.g., sales and purchase orders).

**Extendable.** Functionality for specific needs (e.g., bar coding) are already in place and can be extended further through industry standard tools and APIs.

**Insightful.** All applications include easy to use reporting and self-service BI to quickly create personal dashboards, such as the one below:



## KEY BENEFITS

### WORK THE WAY YOU WANT

- Use Acumatica's robust platform to perform sophisticated customizations, even in a SaaS environment

### GET THE PERFORMANCE YOU NEED

- Meet the most demanding standards of your high-volume business
- Give your employees anytime, anywhere access, from any device

### REMOVE OBSTACLES TO BUSINESS GROWTH

- Add unlimited users at the same price
- Grow your business without adding to your IT budget
- Get the latest updates at no additional cost

### REDUCE COSTS

- Avoid upfront costs for all computing infrastructure such as hardware and data servers
- Eliminate upfront software licenses by using a monthly subscription model
- Shrink IT maintenance and support costs since Acumatica handles hardware and software updates and upgrades



### ACUMATICA CLOUD ERP SOLUTIONS

<b>Financial Management</b>	<p>Powerful financial applications—simple enough for small companies and comprehensive enough for complex multi-nationals. Acumatica’s Financial Management has standard financial processes (GL/AP/AR) and reports used by national and international organizations, plus multi-company and intercompany accounting, fixed assets, recurring and deferred revenue, and cash management.</p>
<b>Customer Management</b>	<p>Acumatica’s Customer Relationship Management (CRM) is fully integrated with the other suites. Customer Management uses dashboards and reports to provide real-time data on all customer activities: quotes, orders, invoices, payments, and support cases or service calls. A self-service Customer Portal lets you give customers access to the information they need.</p>
<b>Distribution Edition</b>	<p>Acumatica’s Distribution Edition works together with Financial Management as a full distribution solution. From Quote-to-Cash and Purchase Requisition-to-Payment, automated processes help eliminate delays and reduce errors. Features include: multiple warehouses, lot and serial number tracking, automated POs, discounts and promotions, and more.</p>
<b>Project Accounting</b>	<p>Deliver project objectives on time and on budget with Acumatica’s Project Accounting. Handle complex billing rules and easily calculate project revenue based on key project-specific attributes. Keep better track of costs by correctly accounting for work in progress (WIP).</p>
<b>Manufacturing Edition</b>	<p>Integrate production planning and shop floor with customer management, sales orders, inventory, purchasing, and accounting. The Manufacturing Management Suite includes BOM and Routing, Material Requirements Planning (MRP), Production Scheduling and Control, Quoting and Estimating, and Product Configurator.</p>
<b>Field Services Edition</b>	<p>Maintain a real-time view of customer activities across all your operations when field service operations are fully integrated with the back office. Streamline dispatching, reduce response times, and minimize costs with the Acumatica Field Services Edition that works with CRM, sales, inventory, purchasing, accounting, and financial reporting.</p>
<b>Commerce Edition</b>	<p>Deliver a consistent customer experience across all your sales channels with full integration between your online, mobile, and in-store service. This complete eCommerce ERP solution tightly integrates a robust eCommerce platform with Acumatica’s Financials, Sales, Inventory, CRM, and Fulfillment systems.</p>
<b>Construction Edition</b>	<p>Improve margins and project control at all stages of home, multi-family, commercial, mixed-use, land development, and government projects. Check dashboards for revenue, costs and commitments. Equip staff and subcontractors with secure apps for time entry, electronic signatures, and more—all with phones and tablets. Exchange information with customers, suppliers, and specialty applications such as Smartsheet, Procore, and Hyphen Solutions for an end-to-end solution.</p>

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