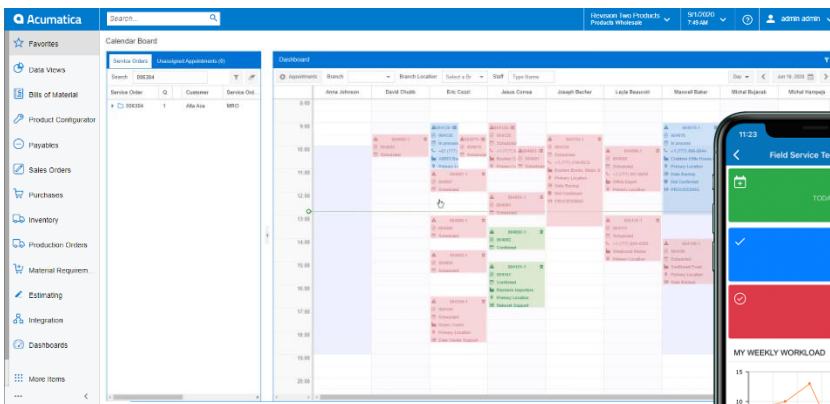## Optimize, Streamline, and Mobilize Field Service Operations
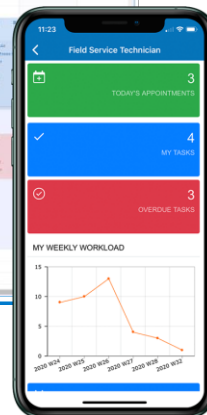
Maximize dispatching by scheduling the right people at the right time and obtain real-time data for work taking place in the field. Acumatica Service Management provides contract management, appointment schedules, and a full-featured mobile application for service-driven businesses, wholesale distributors, construction companies, and manufacturers for deliveries, installation, or remote service operations. Seamless integration to inventory, purchasing, and projects provides service organizations with everything they need to grow their business.

WITH ACUMATICA SERVICE MANAGEMENT, YOU CAN

- **Manage Contracts:** Manage contracts for sale and service, maintenance repair, and recurring maintenance scenarios. Define billing procedures and generate service orders with flexible frequencies.
- **Schedule Appointments:** Schedule technicians based on availability, location, skills, active licenses, or service areas. Accurate schedules reduce overtime costs and maximize customer satisfaction.
- **Plan Inventory:** Track inventory in warehouses and mobile vehicles. Leverage inventory replenishment and purchase orders to ensure inventory availability.
- **Improve Mobility:** Empower technicians with a full-featured mobile application with GPS navigation, electronic signatures, credit card payments, mobile expense receipts, voice dictation for notes, image uploads, and appointment details. Field technicians can see service history and equipment information.
- **Manage Projects:** Track multi-phase projects. Compare original to revised budgets. Manage billing with fixed-price, cost-plus, or capped project costs. Bill service orders and appointments through the project instead of Service Management.
- **Improve Customer Visibility:** Service management integrates with Acumatica CRM providing access to sales history, support cases, and activity history. The customer portal provides access to invoices and other information online.

KEY BENEFITS

EXPEDITE ASSIGNMENTS

- Quickly capture service needs and access customer information, product history, and resources
- Use templates to default service and materials during appointments creation
- Shorten the time between call receipt and appointment assignment

GAIN CONTROL OF REMOTE FIELD SERVICE ACTIVITIES

- Track resource commitments and real-time GPS location
- Obtain real-time access to the progress of the appointment with status updates, the material used, and detailed notes and pictures

IMPROVE COMMUNICATIONS

- Using emails, SMS or push notification, notify resources and customers of appointment assignments or modifications

ACCELERATE DECISION-MAKING

- Improve decisions by using drill-down reports and dashboards to access past information and gain insights into future needs
- Define metrics for technician utilization and service performance

Drag-and-drop service orders onto the visual calendar board. In addition, technicians can access service order and equipment details on the powerful mobile application.

SERVICE MANAGEMENT FEATURES AND CAPABILITIES

Calendar Boards	Create new appointments or assign resources to scheduled appointments. View your resource schedules by day, by week, or by month and filter calendars based on appointment requirements.
Appointments	Update technician schedules from the office. Technicians can start and end appointments in the field, providing instant status updates to users in the application. Manage single or multi-day appointments and pause appointments for travel or break times.
Resource Scheduling	Schedule technicians based on workload, location, or by skill, or certification. Ensure technicians have the right equipment and inventory to complete the job.
Flexible Billing	Generate invoices based on estimations or actuals, and group invoices by service order, time frame, or customer purchase order. Define different billing rules by the customer and by service order type. Start contract billing at the start of the period with fixed-rate or time and material billing.
Route and Resource Tracking on Maps	Visualize estimated route and route statistics by the technician. View actual route history and real-time GPS location to keep track of resources.
Route Optimization	Use WorkWave Routing Engine integration to optimize appointments to minimize driving time. The optimization considers resource working schedules and lunch breaks. This is an optional application.
Mobile App	Update appointments on the road or at customer locations using the mobile application available for Android and iOS. Access customer history, capture payments, enter expense receipts, and capture signatures directly from your mobile device.
Multi-Language and Localization	Support multiple languages, date formats, and number formats. Define a default language by user for the web and on the mobile app.
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 various 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.
Enterprise-Wide Integration	Convert CRM opportunities into service orders and create service appointments from opportunities or projects. Allocate stock items to service orders and create purchase orders from the field. Create appointments for a project and manage budgets and profitability across projects. Capture time for payroll. Manage inventory with integrated purchasing, requisitions, and robust inventory replenishment logic.
Link AP Bills	Simplify cost tracking by linking accounts payable bills to field service appointments for holistic expense management and financial analysis by appointment.
Copy Quote Attachments	Photos, documents, and other files are automatically copied from service quotes to service appointments to ensure a smooth hand-off for field service technicians.

ABOUT ACUMATICA

Acumatica Cloud ERP provides the best business management solution for digitally resilient companies. Built for mobile and telework scenarios and easily integrated with the collaboration tools of your choice, Acumatica delivers flexibility, efficiency, and continuity of operations to growing small and midmarket organizations. **Business Resilience. Delivered**.

Contact us today to get started: 888-228-8300 | acumatica.com