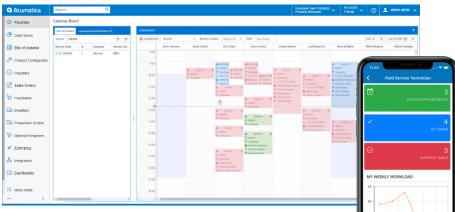


# Optimize, Streamline, and Mobilize Field Service Operations

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.



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.

# **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 drilldown reports and dashboards to access past information and gain insights into future needs
- Define metrics for technician utilization and service performance





## SERVICE MANAGEMENT FEATURES AND CAPABILITIES

esources to scheduled appointments. View your resource schedules or calendars based on appointment requirements.
e office. Technicians can start and end appointments in the field, ers in the application. Manage single or multi-day appointments and k times.
bad, location, or by skill, or certification. Ensure technicians have the plete the job.
ons or actuals, and group invoices by service order, time frame, or erent billing rules by the customer and by service order type. Start d with fixed-rate or time and material billing.
atistics by the technician. View actual route history and real-time es.
ration to optimize appointments to minimize driving time. The ing schedules and lunch breaks. This is an optional application.
at customer locations using the mobile application available for story, capture payments, enter expense receipts, and capture evice.
nats, and number formats. Define a default language by user for the
tomers, specifying which parts are under warranty to avoid s. Multidimensional contracts (different warranty periods for various ick warranties from sales to repair in the field, specifying what is nsure billing accuracy and improve customer satisfaction.
ce orders and create service appointments from opportunities or ce orders and create purchase orders from the field. Create ge budgets and profitability across projects. Capture time for payroll. chasing, requisitions, and robust inventory replenishment logic.
ints payable bills to field service appointments for holistic expense y appointment.
e automatically copied from service quotes to service appointments

#### 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**.

Learn how Acumatica can work in your business by visiting us online at <a href="https://platformtechnologyadvisors.com">https://platformtechnologyadvisors.com</a> or by calling (805) 569-9487.

