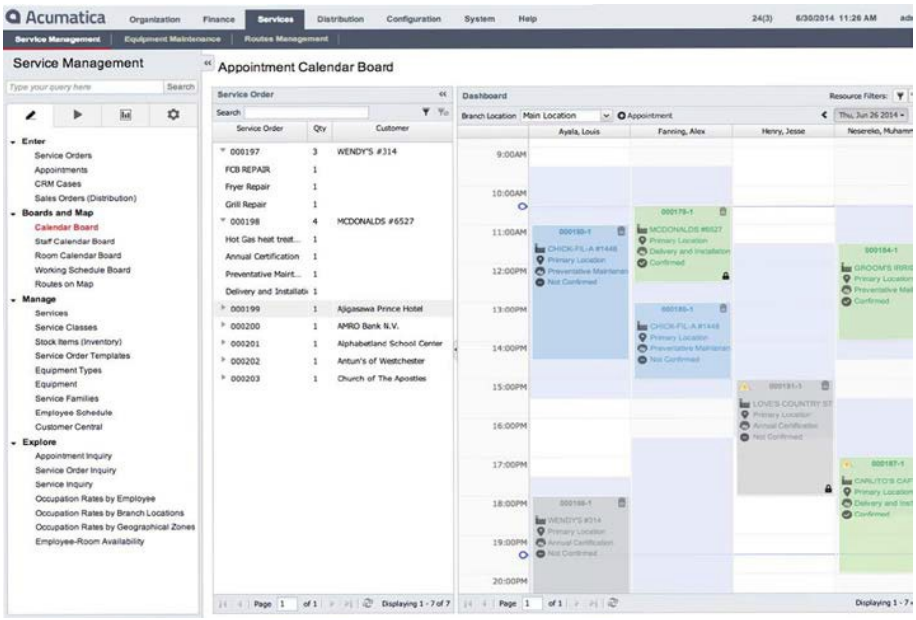
Acumatica
The Cloud ERP

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

Acumatica
The Cloud ERP

Field Service Management

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 installation 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. Users can track and log time by invoking starting and completing actions.

ABOUT ACUMATICA

Acumatica is the world's fastest growing provider of cloud ERP, with the industry's highest customer satisfaction rating trusted by companies across diverse industries. Acumatica is easy-to-use, full-featured and mobile software. With unlimited users, everyone can have a real-time view of your business anytime, anywhere. **Contact us today to get started: 888-228-8300 | acumatica.com**

Blytheco™

For more information

solutions@blytheco.com
www.blytheco.com
949-583-9500