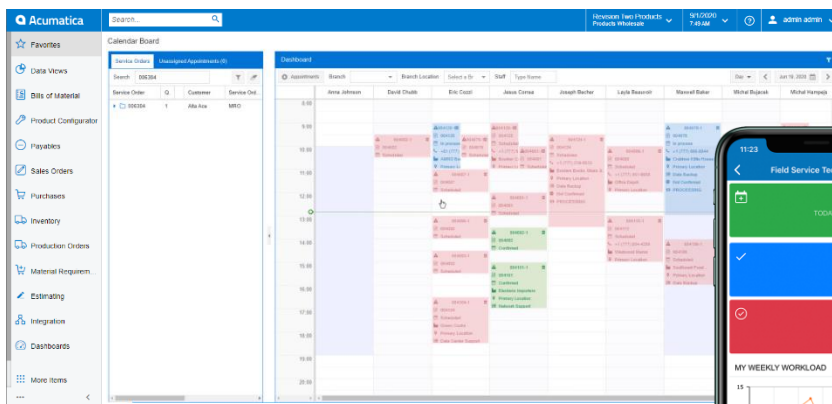


STREAMLINE SERVICE OPERATIONS AND MOBILIZE TECHNICIANS WITH ACUMATICA FIELD SERVICE EDITION

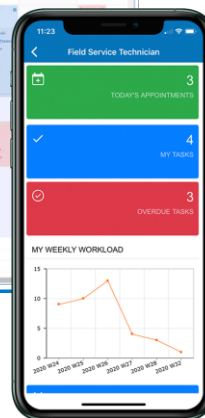
Acumatica Field Service Edition helps service organizations grow with flexible appointment scheduling, contract and warranty management, equipment maintenance, and deep integration with purchasing, inventory, and project accounting.

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.
- **Manage Equipment:** Record the history of customer-owned or company-owned equipment. Avoid mischarges and objections by establishing warranty offers for equipment or components. Keep track of serial numbers, define default vendors, and track sale and installation dates for each component.



Drag-and-drop service orders onto the visual calendar board. See technician workload and availability and organize schedules by branch or location. 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
- Assign appointments to the right resource at the right time, considering the workload, location, needed skills, and certifications

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 CUSTOMER SERVICE

- Using emails, SMS or push notification, notify resources and customers of appointment assignments or modifications
- Gain complete visibility of your customer's equipment items including serial number, setup, history, and warranty commitments

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

WARRANTY TRACKING

- Improve customer satisfaction by tracking warranty classes according to models of equipment

FIELD SERVICE EDITION 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.
Scheduling	Schedule technicians based on workload, location, or by skill or certification. Ensure technicians have the right equipment and inventory to complete the job. Schedule and maintain a history of appointments for services performed on equipment items installed at customer facilities.
Project 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. Bill service orders and appointments through projects instead of Service Management.
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 the working schedule of your resources, as well as 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.
Component Handling	Define components of equipment items and schedule appointments for regularly scheduled replacements.
Warranty Tracking	Define warranties by equipment and by component. The system will notify the employee and manager as appointments are manually or automatically scheduled.
Preventative Maintenance	Create recurring schedules for preventive maintenance and fine-tune appointment assignment using calendar boards.
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.

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](tel:888-228-8300) | acumatica.com