Service Management

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.

- **Expedite service assignments**
- **Gain control of remote field service activities**
- **Improve communications with customers and technicians**
- **Accelerate decision-making with drill-down reports and dashboards**

Optimize, Streamline, and Mobilize Field Service Operations

Maximize dispatching by scheduling the right people at the right time and obtaining real-time data for work in the field. 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.

- **Schedule Appointments:** Schedule technicians based on availability, location, skills, active licenses, or service areas.

- **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.

- **Manage Projects:** Track multi-phase projects. Compare original to revised budgets. Manage billing with fixed-price, cost-plus, or capped project costs. 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 business benefits

- Quickly capture service needs and access customer information.

- Track resource commitments and real-time GPS location.

- Obtain updates on materials used and appointment status.

- Assign appointments using emails and SMS push notifications.

- Define metrics for technician utilization and service performance.

"Prior to Acumatica, we would spend a lot of time in multiple different systems. Now we spend all our time in Acumatica, and it allows management to see what we're doing at any given time."

–Daniel Ruiz, Field Service Manager, OFS International

Calendar Boards

Create new appointments or assign resources to scheduled appointments. View your resource schedules by day, week, or month and filter calendars based on appointment requirements. Photos, documents, and other files are automatically copied from service quotes to service appointments to ensure a smooth hand-off for field service technicians.

Appointment Scheduling

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.

Inventory Planning

Track inventory by warehouse location. Identify inventory serial or lot detail. Transfer inventory between physical or mobile warehouse locations. Manage inventory based on usage and run replenishment reports to avoid costly rush orders.

Resource Scheduling

Schedule technicians based on workload, location, skill, or certification. Ensure technicians have the right equipment and inventory to complete the job.

Resource Tracking on Maps

Visualize estimated route and route statistics by the technician. View actual route history and real-time GPS location to track resources.

Route Optimization and Resource Tracking

Use WorkWave Routing Engine integration to optimize appointments, minimize driving time. The optimization considers work schedules and lunch breaks.

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, and capture signatures directly from your mobile device. Enter expense receipts and streamline service expense workflows with scanned receipt image recognition from the mobile app.

Self-Service Portal

Empower customers with online access to customer account information. The portal lets them review invoices, request quotes, and download invoices, statements or other documents. Give customers service-related updates through the portal.

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 application.

Equipment Management

Extend Service Management by adding the Equipment Management application. Record the history of customer-owned or company-owned equipment. Create maintenance and service schedules with recurring appointments.

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.

Enterprise-Wide Integration

Convert CRM opportunities into service orders and create service appointments from opportunities or projects. Allocate stock items to service orders and generate 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.

Flexible Billing

Generate invoices based on estimations or actuals and group invoices by service order, period, 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. Simplify cost tracking by linking accounts payable bills to field service appointments for holistic expense management and financial analysis by appointment.

Contract Renewals

Simplified service contract renewals optimize and streamline business workflows.

Side Panels

Use side panels for a quick and comprehensive view of key project data without navigating out of the current window. Easily drill down into relevant details on any record selected with standard prebuilt side panels or build custom side panels for different uses and roles.

![Protelo logo - LEADING WITH INTEGRITY]

For more information contact Protelo at www.proteloinc.com | 916-943-4428