

# Why Service-Driven Companies Thrive with Acumatica Cloud ERP

## **MOBILIZE FIELD SERVICE OPERATIONS ON A COMPREHENSIVE, FUTURE-PROOF CLOUD PLATFORM**

Field service companies have historically been underserved when it comes to cutting-edge applications to manage their businesses. Legacy systems and entry-level accounting software with service bolt-ons provide limited functionality and pose connectivity issues for field technicians. On-premises applications create data silos limiting access to information for remote workers. Customer satisfaction suffers from delayed resolutions, late service calls, and inaccurate billing.

Service organizations struggle to grow with disparate applications for customer management, quoting, project management, scheduling, and route optimization. Disconnected systems result in manual processes, lost revenue, and cash flow problems.

Acumatica is unlike any other midmarket ERP application. Built on a future-proof cloud platform, it incorporates everything service-driven organizations need to manage all parts of their business in a single, connected system.

### **INSIDE THIS eBOOK:**



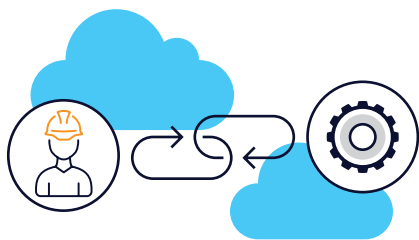
Discover why service-driven organizations across industry segments choose Acumatica as a strategic and comprehensive business platform to manage field service operations, equipment, warranties, projects, and service supply chains.

# Powerful and Comprehensive Business Application for Field Service Management

Service-driven organizations with disconnected, piece-meal applications struggle to drive growth. Lack of integrated marketing and sales automation applications limit new business opportunities. Incomplete inventory management and procurement features cause stock-outs and rush orders, wreaking havoc on service schedules dependent on replacement parts and equipment.



Delayed expense capture and manual processes make it challenging to consolidate labor, materials, overhead, and other costs to determine profitability by appointment or project. Bolt-on service applications pose synchronization issues for IT staff with limited collaboration between remote field technicians and in-house users.



Drive growth with the service-centric Acumatica Cloud ERP platform. The extensive application provides connected financials, project accounting, order management, and inventory applications. Field service applications can be added to Acumatica product editions for distributors, manufacturers, and construction organizations.

Gain a deeper understanding of profits with powerful inquiries, flexible reports, configurable dashboards, and robust business analytics.

## **BEST IN CLASS FINANCIAL APPLICATIONS**

Acumatica provides extensive financials with Intercompany Accounting. Streamline processes with Deferred and Recurring Revenue, Fixed Assets, Payroll, Advanced Expense Management, and Bank Feeds.

## **COMPREHENSIVE SERVICE MANAGEMENT FEATURES**

Schedule appointments, create contracts, log support cases, capture service order details, and manage warranties. Track customer equipment with serial numbers, manufacturer warranties, location details, and other information.

## **EXTENDED APPLICATIONS ON A SINGLE PLATFORM**

Manage inventory with connected purchasing and requisitions, flexible sales orders, point of sale, and commerce applications. Route Optimization and Project Accounting provide additional functionality.

With Acumatica, you will always know the health of your company's operations — from appointments to equipment and projects to financials — to help you make better decisions to grow your business.

"If you are looking for an all-inclusive solution that provides service and inventory and sales order management — it [Acumatica] has got to be in the mix of what you want to look at because there is nothing I have seen out there that will do as much as Acumatica will do."

– DERRICK ELLEDGE, VP OF OPERATIONS AND CO-OWNER  
POWER STORAGE SOLUTIONS



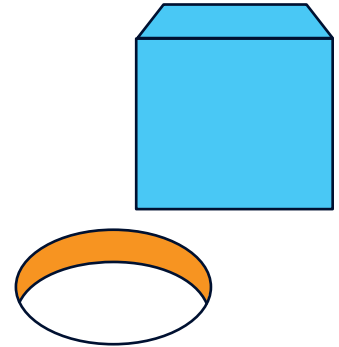
#### **HEAR WHAT OUR CUSTOMERS HAVE TO SAY:**

"My dispatchers are thrilled to pieces to have the calendar board, the flexibility to move appointments around as they see fit, the flexibility to assign different technicians to those appointments. Also, it affords us the ability to see who's out there, who's working, and how long they're expected to be on that appointment so we can be more efficient with our estimates to our clients about when we expect to have a technician on site."

– JENNIFER HARLER, COO, DP AIR CORP

# Mobilize Field Service Operations on a Future-Proof Cloud Platform

Most field service ERP applications have aging technology platforms for in-house deployment. Mobile plug-ins for entry-level accounting software provide field technicians with access to a limited amount of information with few collaboration tools to communicate between in-house dispatchers and remote workers. IT departments face ballooning licensing fees and prohibitive integration costs as they struggle to piece together disparate applications with one-off customizations and integrations.



Acumatica's mobile cloud platform facilitates low-code and no-code integration with flexible configuration to adapt to the way you do business. Field technicians access the same data as in-house users through secure web browsers on any device. Acumatica's mobile app enhances communication between remote and in-house users with real-time updates for service order status, field notes, and GPS locations. Connect external systems with Open APIs for bi-directional improvements in processes and data visibility. Harness artificial intelligence and machine learning to improve data accuracy.

IMPROVE SERVICE OPERATIONS WITH A FUTURE-PROOF CLOUD PLATFORM DESIGNED FOR MOBILITY AND SCALABILITY. CONNECT TEAMS WITH NATIVE MOBILITY TO DRIVE GROWTH ACROSS THE ORGANIZATION.

- ✓ Scalable and Secure
- ✓ Big Data and Analytics
- ✓ Global Extensibility
- ✓ Artificial Intelligence and Machine Learning
- ✓ Mobile Access Anytime, Anywhere, on Any Device
- ✓ Rapid Integration with Open APIs

Acumatica's mobile app and open cloud architecture connect remote field workers with in-house employees for real-time information anytime, anywhere, on any device for enterprise-wide data visibility.

“Except for Acumatica, everything felt like it was going away — like legacy, old. Even NetSuite, something was weird about that to us . . . Acumatica was on the rise while the others felt like they were fading away.”

– KELLY BURNS, ERP DEVELOPER & FORMER COO  
M3 TECHNOLOGY GROUP



#### **HEAR WHAT OUR CUSTOMERS HAVE TO SAY:**

“I think one of the reasons we stayed where we were for so long is that when you start looking at integrated software, it's very expensive. But Acumatica is very modern and progressive and has a very different pricing model than all the other software we looked at. I loved the transaction-based pricing.”

– REBECCA OGLE, CFO, SAFETY MANAGEMENT GROUP

# Hear customer stories on how their business thrive with Acumatica service management applications



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# Exceed Customer Expectations Every Time



Inefficient scheduling and out of stock situations for replacement parts create service call delays. Ineffective communication destroys customer relationships. Technicians cannot provide superior service if they do not have the resources they need to do the job right the first time. Service delays, poor communication, substandard service, and poor customer support negatively impact customer satisfaction. Frustrated customers buy less, and unhappy customers switch to your competitors.

Acumatica provides in-house and remote workers with access to information anytime, anywhere, on any device. Technician availability, credentials, certifications, and location help dispatchers identify each service call's best resource. Route optimization ensures that technicians get to jobs faster. Inventory management and purchasing combine to maintain adequate stocking levels for service parts and supplies. The mobile app affords instant access to equipment details, warranty information, and service history. Manage complex projects with flexible billing options to satisfy the most demanding customers.



Track and manage support requests effectively with the case management system. Create business events to notify customers when you receive equipment or parts needed for their service orders or when the service order status or dates change.

## MAXIMIZE SCHEDULES

View technician utilization, location, and credentials. Minimize scheduling conflicts by ensuring resource and inventory availability. Adjust schedules on-the-fly for emergency service calls. Optimize routes to get technicians to jobs faster.

## EMPOWER TECHNICIANS

Manage inventory to ensure availability for replacements parts and supplies. Technicians can access equipment information, service history, customer information, photos and documents, and everything they need to complete the job from their mobile device.

## ENRICH COMMUNICATION

Gain a 360-degree view of customers with embedded CRM. Dazzle customers with flexible, timely, and accurate billing. Provide superior support with case management and improve customer communications and access to information.

Deliver an amazing customer experience with faster response times, shorter appointments, and improved services. Differentiate with superb customer support, convenient self-service, and customer-centric processes.

“We can get contact information to our guys a lot better, and we can put directions on how to get there. We’re more likely to be on time. We get the inventory right — right away — because it’s built into the system. We don’t have to track it down, so billing is a lot more accurate. We don’t have to go back and change anything because the inventory was wrong. Customers are more satisfied because of everything being more accurate and more timely.”

– CODY SHARP, MANAGER OF INSPECT & TEST DEPARTMENT  
SECURITY SOLUTIONS NW



#### **HEAR WHAT OUR CUSTOMERS HAVE TO SAY:**

“One of the things that we do is we measure customer satisfaction through TrustPilot and . . . the rate with which we are getting five-star ratings is really improving. Our ability to communicate with our customers in a consistent format and with consistent messaging is improved because we’re doing so through Acumatica.”

– BRYAN MULLEN, SVP SHARED SERVICES, LIFEWAY MOBILITY



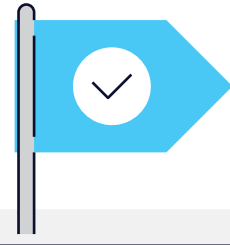
# Summary

Acumatica is the clear choice for growing service organizations that demand adaptable service management capabilities, best-in-class financial applications, and extended features to manage inventory, purchasing, route optimization, and more.

Eliminate data silos, capture data faster, and gain new insights into every area of your business. Understand costs and profitability by appointment or project.

Exceed customer expectations with configurable contracts, equipment and warranty management, flexible scheduling, and robust mobile applications. Enhance customer billing and communication with embedded customer support to create happy, healthy, and long-term customer relationships.

Designed for mobile accessibility anytime, anywhere, on any device, Acumatica provides leading service-driven organizations with a future-proof business platform to thrive in the new digital economy.



“Prior to Acumatica we would spend a lot of time in multiple different systems in order to get to the end task. So now, Acumatica allows us to spend all of our time in Acumatica. It allows management to see what we’re doing at any given time.”

– DANIEL RUIZ  
FIELD SERVICE MANAGER  
OFS INTERNATIONAL

## 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 more about how Acumatica can work in your business by visiting us online at [www.acumatica.com](http://www.acumatica.com).

