KEY BENEFITS

BETTER INFORMATON

Track and manage every detail of your service organization with Acumatica Service Management.

Share best practices, automate manual processes, and track service inventory by integrating information, people, and resources.

A SINGLE, REAL-TIME VERSION OF THE TRUTH

Service Management is your connection between field service operations, projects, CRM, order management, and inventory management, providing all the required information to generate service appointments from Sales Orders or CRM Cases.
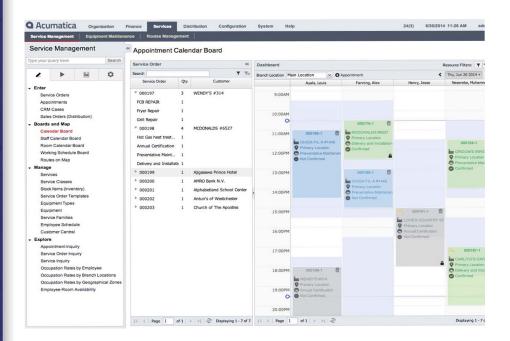
Better business insights and decisions result from the combination of automated processes, accurate data collection, financial analyses, and forecasting capabilities.

ACUMATICA SERVICE MANAGEMENT SUITE

Quickly capture service needs to shorten the time between call receipt and job assignment. Track resource commitments, match tasks to best available resources, and generate work orders.

Streamline processes to reduce response times and costs, resulting in increased revenues and customer satisfaction that ultimately give you a competitive advantage.

Utilize the easy to learn and use field services calendar scheduling board. Create daily or weekly schedules automatically or by using drag-and-drop tools.

100% CUSTOMIZABLE AND BUILT IN ACUMATICA TOOLS

Based on a foundation of Acumatica's world-class technology, the Service Management Suite is built for the cloud and mobile world. It is flexible and customizable to adapt to your business' ever-changing requirements.

Because servicing your customers is important to your company, you can now implement the Acumatica Service Management Suite, which delivers a complete set of functionality for field service operations.

SERVICE MANGEMENT SUITE'S KEY FEATURES

Scheduling, Dispatching, and Call Center	Quickly capture service needs and access customer information, product history, and resources required to shorten time between call receipt and job assignment. Create daily or weekly schedules automatically or by using drag-and drop tools on the visual calendar board.
Route Management	Optimize routes for appointments with this powerful tool. Filter appointments in many different ways. Plot the route in Google Maps for each specific response person along with listing required resources (equipment or machine). Sold as a separate application.
Equipment Maintenance	Record the details of equipment and products installed at each customer's site and track repair parts in stock. Track equipment by manufacturer, model, configuration, and schedule preventive maintenance service orders. Customer equipment can be associated to recurring schedules and contracts in Acumatica Customer Management. Sold as a separate application.
Service Contract Management	Create and manage multiple service schedules per customer, then generate, project, plan, and fine-tune all the appointments using the Schedule Calendar Board for staff and resources. The resource mode is used to polish details about exact hours and days.
Warranty Management	Track Customer and/or Vendor parts that may need warranty with Acumatica's added Inventory functionality. Establish warranty offers for your customers, specifying which parts are under warranty to avoid confusion, mischarges, and objections.
Mobile Service Management	Keep your staff members connected through any device with a browser or with the native mobile Android and Apple iOS (iPad) app so they'll be able to access service information and customer data from anywhere, at any time.
Staff Dashboard	Update your mobile staff schedules on their devices by sending SMS/email to your staff on selected configurable events like bookings, confirmation of appointments, etc.
Tools and Resources	Schedule services requiring special tools or resources that might have limited availability. The system will track the quantities and alert you if any tool or resource becomes unavailable.

ADAPTABLE CLOUD

UP IN THE CLOUD:

All applications are created for the cloud, which means that users with appropriate privileges can access the information from any device with a web browser or on native mobile apps.

DEPLOYMENT OPTIONS:

Acumatica can be installed in-house or in a private or public cloud of your choice. Your deployment and pricing options are designed to ensure mid-market success.

CONNECTED CLOUD:

Built for your business and can grow with your needs. Add capabilities such as CRM and data visualization. The flexible architecture allows for customization without the need for coding.

EASE OF USE:

Staff and customers can collaborate easily and efficiently on Mac, PC, tablet, or phone. Use the built-in User Guide for self-paced learning as roles and requirements evolve.