Service Management Applications

A scalable service delivery platform

> "Nothing I've seen out there will do as much as Acumatica will do."
>
> – Derrick Elledge, VP of Operations, Power Storage Solutions

Integrated Service Management Solution for All Industries

Drive growth and provide exceptional service delivery with a service management platform built to scale with your business. Acumatica's modular architecture supports the service needs of a wide range of industries.

Manage financials, customer relationships, sales, purchasing, inventory, and service operations all in one platform. Schedule appointments, manage equipment, and track warranties or contracts in real time. Mobile apps empower technicians with GPS navigation, voice-dictated notes, and service history from anywhere. Start service tasks, capture signatures, issue inventory, record expenses, and close out work orders from any mobile device. Streamline support with a customer portal that lets users submit cases and manage contracts.

Acumatica makes service management intuitive and scalable, helping your business respond faster, manage smarter, and grow.

Integrated field and service management solution for all industries

Streamline operations and align teams with a single, connected ERP platform designed for modern business. Empower employees to manage daily tasks and strategic goals with ease—using role-based dashboards, configurable workflows, and embedded AI to boost efficiency, enhance client satisfaction, and fuel long-term growth.

C-level Executives
- Oversee business strategy
- Plan organizational growth
- Drive effective business operations

Service Manager
- Oversee daily operations
- Maintain customer relations
- Analyze service productivity

Service Dispatcher
- Coordinate service operations
- Manage incoming work
- Communicate with field and office

Purchasing Manager
- Negotiate and select suppliers
- Ensure timely deliveries
- Manage vendor relationships

Warehouse Manager
- Oversee warehouse operations
- Manage parts, materials distribution
- Ensure inventory accuracy

Technician
- Service, install, repair and maintain
- Record work for billing purposes
- Represent the company favorably

Maintenance Planner
- Coordinate maintenance needed
- Identify parts, tools, and labor
- Assist with material procurement

Billing Specialist
- Verify company and customer pricing
- Prepare and issue timely invoices
- Manage payments

Contract Specialist
- Manage contract agreements
- Prepare and issue contract invoices
- Oversee contract renewals and expirations

"We've torn down the silos we had with the client-server solution, so now we have access in one view of the data. We're now able to see where we are cost-wise with our existing construction projects; we're able to look at the profitability of each project, look at the customer base and understand where we are most successful."

– Jeff Hamilton, President, Roberts Glass & Service

Resource and Appointment Scheduling

Ensure the right technicians, equipment, and materials are available for each service order. Use the calendar board to schedule and manage appointments by technician and resource, providing the highest levels of customer service.
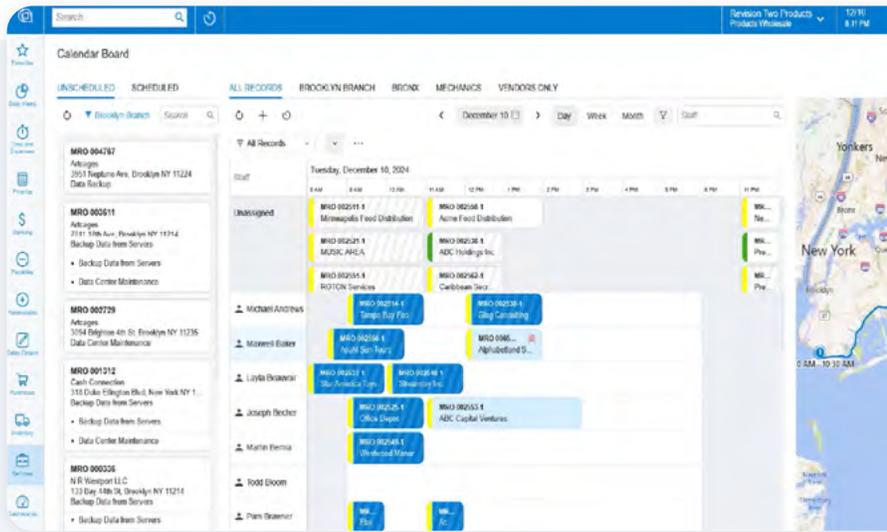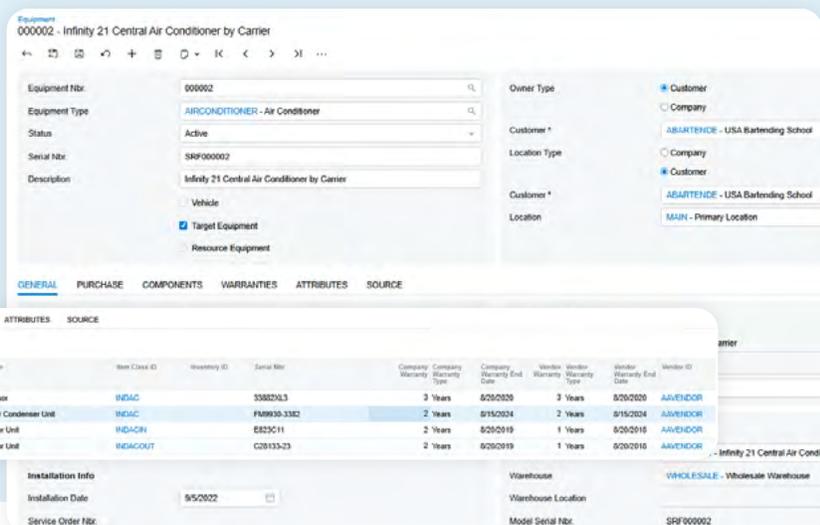

Billing

Leverage flexible billing options and generate invoices from estimations or actuals. Customize your invoice views by service order, appointment, or customer purchase order.
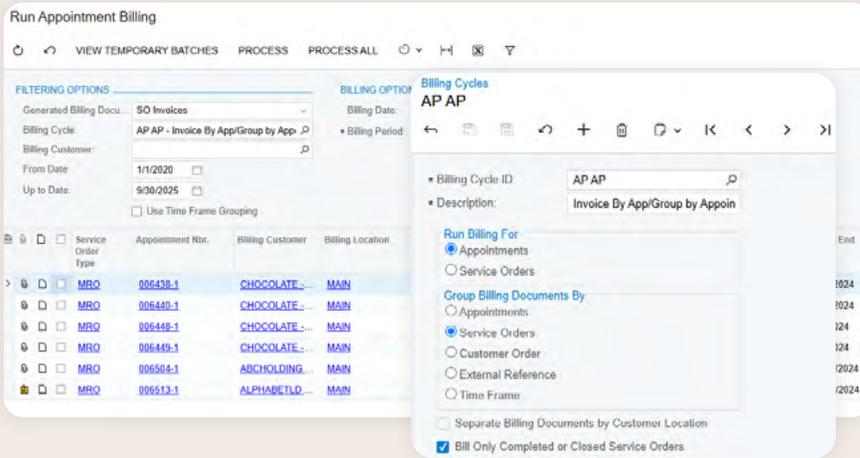
Equipment

Record history of customer-owned or company-owned equipment. Establish warranty offers and track serial numbers, define default vendors, and track sale and installation dates.

Contracts

Manage contracts and renewals with automated workflows. Contract billing can be scheduled at the beginning of the month, end of the month, or on demand when work is completed.

Customer Management

Streamline the customer journey and enhance the overall experience with embedded AI to capture and utilize customer data. Give customers access to their service and sales history, support cases, and related activities.

Enterprise-Wide Integration

Convert CRM opportunities into service orders and create service appointments from opportunities or projects. Allocate stock items to service orders and general purchase orders from the field.

Device-Agnostic Mobility

Mobility is critical for service organizations. Connect remote workers and back-office managers in real-time with appointment updates, schedule changes, technician and consultant location via the mobile app, equipment and project information, and appointment status. Remote workers can review documents and access checklists from any device with an internet connection. On-the-go executives have real-time data in the palm of their hand, including mobile dashboards, employee approval requests, time cards, and expense receipts.

CRM Account, Contact, and Support Case Details

Equipment Warranties and Service History

Photo and Signature Capture via the Mobile App

Collect Payments and Create Purchase Orders

Mobile Time and Expense Reporting

Project Inquiries and Reports

Inventory Look-Up and Equipment Serial Number Barcode Scanning

Appointment Schedules, Voice Dictation, and Work Instructions

GPS Navigation and Location Tracking via the Mobile App

- Capture and assign service requests

- Manage appointments by technician and resource

- Improve customer satisfaction with CRM visibility

10,000+
Valued Customers

180M
Transactions Every Month

97%
User Satisfaction Rating

700+
Dedicated Employees

Deep Industry Functionality

Service companies have varied needs often unmet by traditional ERP applications. Acumatica provides a broad set of adaptable business applications enabling service companies to configure the application to meet their specific business and industry needs. Construction service companies enjoy robust project accounting for job management with native field service for appointment scheduling and mobile applications for technicians. Professional service organizations leverage project accounting with task entry and flexible billing. Field service companies across diverse industry segments manage equipment with serial numbers, warranties, and equipment details. The Service and Support application is essential for managed service providers with case management and customer self-service portals.

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Agricultural, Landscaping, and Forestry
agricultural services, irrigation, landscaping, forestry services

Commercial Services
food and restaurant equipment and services, other commercial services

Construction, Plumbing, Electrical, and HVAC
fasteners, hardware, plumbing, heating, cooling, valve fittings

Engineering, Architecture, and Surveying
engineering, research and development, architecture, surveying

Medical and Health Services
home health services, traveling nurses, medical equipment services

Home Services
garage door, pool, appliance, spa, water system and other services

Janitorial, Sanitation, and Maintenance
janitorial and sanitation services, facility maintenance and management

Manufacturing Services
product, equipment and supply deliveries, installation and repair

Motor Vehicle and Transportation Services
vehicle window replacement, towing and hauling, other services

Oil, Gas, and Mining Services
oil and gas field services, exploration and mining services

Pest Control
extermination, insect and pest control and removal services

Professional Services
consulting, business management, advertising, marketing

Safety and Security
security system monitoring, safety management and training

Staffing Services
employee staffing and labor-related services

Technology Services
managed computer and application services, audio visual installation

Utilities and Communication Services
electrical, water, solar, energy, telecommunications, and other services

Veterinary Services
equine, cattle, and farm animal health services

Wholesale Distribution
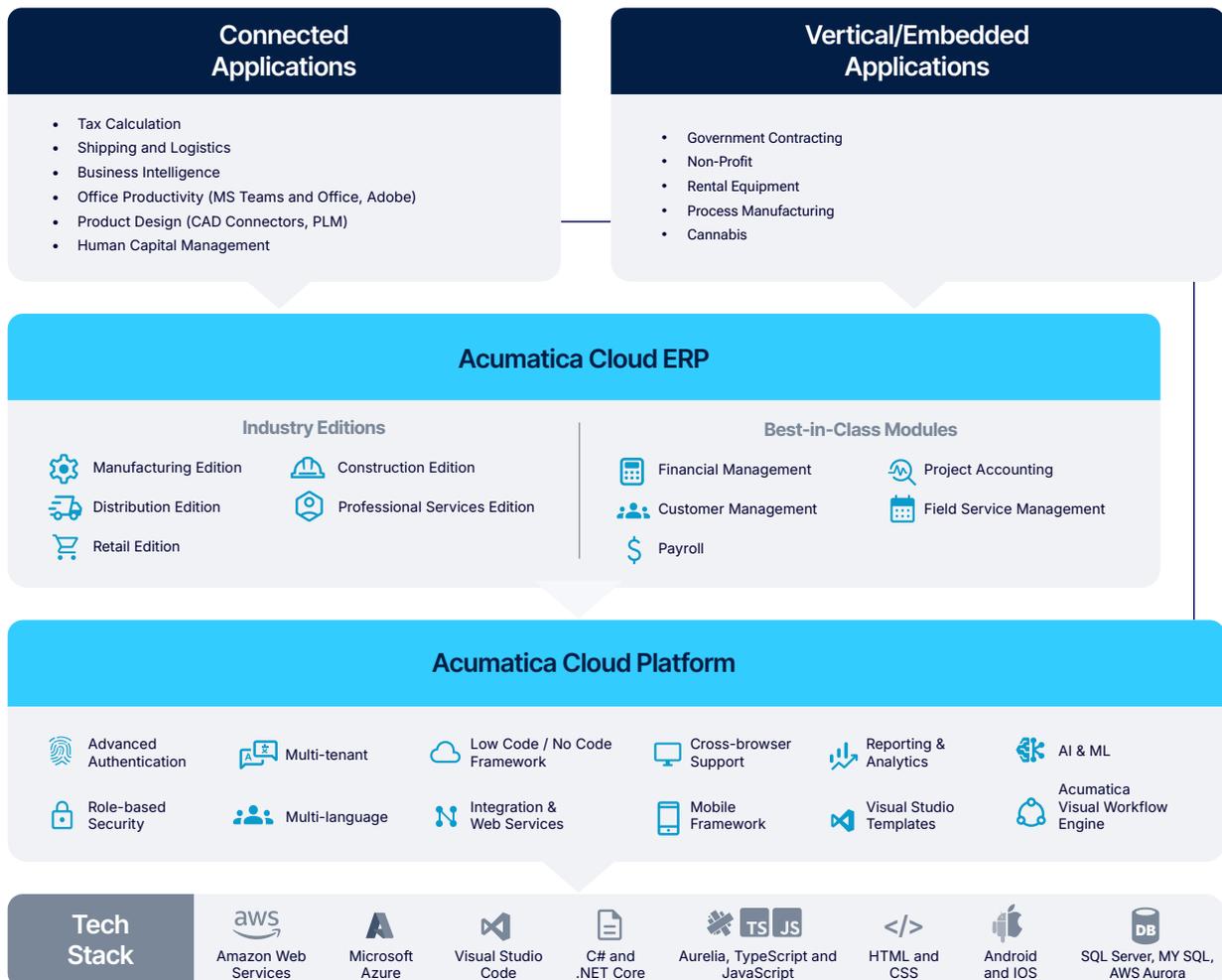product, equipment and supply deliveries, installation and repair

The Adaptable Acumatica Cloud ERP Platform

The Acumatica Cloud ERP platform is built on the world's best cloud and mobile technology, providing the tools business users need to reimagine an interconnected world.

The architectural framework and application development platform leverage new technologies with user-driven feedback, empowering business users to tailor the system with role-based security and low-code and no-code customization tools for a personalized ERP experience. Developers can easily customize and extend the application to meet unique business and industry requirements.

Acumatica allows users to modify workflows, rearrange screens, customize reports, build dashboards, and tailor the system without writing code. Transform your business, collaborate across departments, and prepare for growth with a business management platform that adapts to your evolving needs.

Connected Applications

- Tax Calculation
- Shipping and Logistics
- Business Intelligence
- Office Productivity (MS Teams and Office, Adobe)
- Product Design (CAD Connectors, PLM)
- Human Capital Management

Vertical/Embedded Applications

- Government Contracting
- Non-Profit
- Rental Equipment
- Process Manufacturing
- Cannabis

Acumatica Cloud ERP

Industry Editions

- Manufacturing Edition
- Distribution Edition
- Retail Edition
- Construction Edition
- Professional Services Edition

Best-in-Class Modules

- Financial Management
- Customer Management
- Payroll
- Project Accounting
- Field Service Management

Acumatica Cloud Platform

- Advanced Authentication
- Role-based Security
- Multi-tenant
- Multi-language
- Low Code / No Code Framework
- Integration & Web Services
- Cross-browser Support
- Mobile Framework
- Reporting & Analytics
- Visual Studio Templates
- AI & ML
- Acumatica Visual Workflow Engine

Tech Stack

- Amazon Web Services
- Microsoft Azure
- Visual Studio Code
- C# and .NET Core
- Aurelia, TypeScript and JavaScript
- HTML and CSS
- Android and IOS
- SQL Server, MY SQL, AWS Aurora

Manage your Entire Business with a Modern and Holistic ERP Solution Tailored for Every Need

Financials

General Ledger
Accounts Payable
Accounts Receivable
Deferred Revenue
Recurring Revenue
Cash Management
Tax Management
Bank Feeds
Fixed Assets
Payments
Payroll Management
Currency Management
Global Financials
Multi-Entity/Intercompany
Time Management
Expense Management

Business Insights

Acumatica Reports
Generic Inquiries
Role-Based Dashboards
Microsoft Power BI
Business Events

Wholesale Distribution

Inventory Management
Sales Orders
Purchase Orders
Purchase Order Requisitions
Warehouse Management (WMS)
Distribution Requirements Planning

Manufacturing

BOM and Routings
Production Management
Material Requirements Planning
Advanced Planning & Scheduling
Product Configurator
Manufacturing Estimates
Engineering Change Control
Arena Connector

Professional Services

Project Accounting
Project Management
Progress and Milestone Billing
Resource Management
Contract Management
CRM Service and Support
Field Reporting and Mobility
Time Management
Expense Management

Retail & Sales

Amazon Connector
Shopify POS Connector
Shopify Connector
B2B on Shopify Connector
BigCommerce Connector
Sales Orders
CRM Marketing and Sales
Customer Portal

Construction

Construction Financials
Cost Projections
Progress Billing
Construction Payroll
Job Cost Accounting
Project Management
Field Service
Equipment Management
Compliance
Change Management
Material Management
Preconstruction

Other Industries

Agriculture, Forestry, & Fishing
Banking and Finance
Communications & Utilities
Educational Services
Equipment Rental
Healthcare
Non-Profit & Membership
Oil, Gas, and Mining
Process Manufacturing

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Acumatica – Different by Design

Acumatica is different by design and purposely built to help growing companies thrive in today's digital economy. Our industry-specific business management software features intelligent workflows and market-leading usability that enable companies to manage risk, anticipate disruption, and seize new opportunities. Our principled business practices, growth-friendly licensing, and flexible deployment options put organizations in control of their future.

We recognize that no business succeeds alone, and that's why Acumatica is more than a product—it's a thriving community of partners, customers, and creators committed to delivering technology that enables tomorrow's leading companies to innovate, collaborate, and grow on their terms.

Customer Bill of Rights

Clear fee structures without surprises	Consumption-based license fees
Always-free educational resources	Adapt and customize to your needs
Freedom to choose partners and providers	Fair pricing without long-term commitments
Own and access your data, now and always	Deployment freedom on a public or private cloud
Comprehensive security for access, data, and devices	Open platform with APIs for rapid integration

+33
Industry-Leading
Net Promoter Score

240+
Independent
Software Vendors

350+
Global Channel
Partners

1
Unique, Singular
Product Focus

Connected Service Management Apps

> "Acumatica has exceeded our expectations. From a technology and operations point of view, Acumatica ticks all the boxes: It's engaging for users, scalable, flexible to meet your needs, and grows with you as a business."

– Chris Drake, Chief Operating Officer, Smartnumbers

Acumatica Cloud ERP is a comprehensive business management solution that was born in the cloud and built for more connected, collaborative ways of working. Designed explicitly to enable small and mid-market companies to thrive in today's digital economy, Acumatica's flexible solution, customer-friendly business practices, and industry-specific functionality help growing businesses adapt to fast-moving markets and take control of their future.

For more information on Acumatica, visit www.acumatica.com or follow us on LinkedIn.

Acumatica
The Cloud ERP