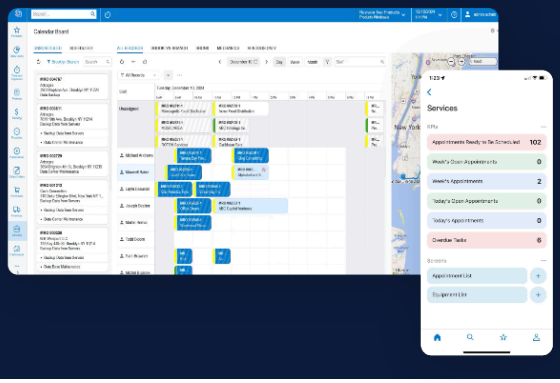
Acumatica
The Cloud ERP

Field Service Management

Acumatica Field 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, maintenance, and repairs.



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 FIELD SERVICE MANAGEMENT, YOU CAN

Manage contracts: Oversee contracts for sale, service, and recurring maintenance.

Schedule appointments and resources: Assign technicians by workload, skills, or location. Update schedules instantly and support single or multi-day appointments in the field.

Plan inventory: Track and transfer inventory in warehouses and vehicles. Automate replenishment to avoid shortages and costly rush orders.

Improve mobility and time tracking: Technicians use a mobile app for navigation, e-signatures, expense capture, and payment. Clock-in and persistent timers make job tracking easy, with seamless job switching and no double entry.

Manage projects: Track multi-phase projects, billing, and budgets. Manage billing with fixed-price, cost-plus, or capped project costs. Link related projects in a parent-child hierarchy to bill or report across phases and sites.

Improve customer visibility: Integrate with CRM for sales and support insights. The customer portal gives clients access to invoices and real-time information.

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.

Related resources

Why Service-Driven Companies Thrive with Acumatica

LEARN MORE →

10 Ways Field Service Companies Grow with Acumatica

LEARN MORE →

Schedule a Personalized Demo

LEARN MORE →

> "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

> CUSTOMER STORIES

Capabilities

From dispatch to billing: what dispatchers, technicians, and customers need in one system.

DISPATCH AND SCHEDULING

Calendar boards

Create appointments and assign resources. View schedules by day, week, or month, and filter or group by technician, skills, service area, or type of work so multiple dispatchers can work side by side. Available in the modernized Service Management app.

Resource scheduling and tracking

Schedule by workload, location, skill, or certification, and confirm technicians have the right equipment and inventory. See planned routes and live GPS location on a map to adjust schedules or update customers.

IN THE FIELD

Mobile app

Available for Android and iOS. Start, pause, and end appointments, clock in with a persistent timer, and switch jobs with no double entry. Mobile clock-in and clock-out, plus time cards for any period with running daily and per-task totals, keep time accurate. Access customer history, capture payments and signatures, and scan expense receipts.

Inventory planning

Track stock by warehouse or vehicle, including serial and lot detail. Transfer between locations and run replenishment reports to avoid costly rush orders. Create material transfers straight from a project's materials list to stage goods where the work happens.

CONTRACTS AND ASSETS

Contract renewals

Create, renew, and monitor contracts so customers and finance teams share one clear agreement.

Equipment management

Record the history of customer-owned or company-owned equipment and create maintenance schedules with recurring appointments.

Warranty management

Set warranty offers by part and period, then track coverage from sale to repair so it is clear what is and is not covered.

BILLING, INTEGRATION, AND CUSTOMERS

Flexible billing

Invoice from estimates or actuals, grouped by service order, period, or purchase order. Bill fixed amount or time and materials, on a schedule or on demand, and link payable bills to appointments for cost tracking.

Enterprise-wide integration

Convert CRM opportunities into service orders, allocate stock, raise purchase orders from the field, and manage project budgets, payroll time, and replenishment in one system. Real-time inventory availability and related-item suggestions appear right in opportunities and quotes.

Portal, reporting, and side panels

Customers review invoices, request quotes, and download statements online. Staff get quick drill-down views of key data through prebuilt or custom side panels. Optimized Generic Inquiries load large data sets faster in dashboards, and AI Assistant answers business questions from ERP data.

ABOUT ACUMATICA

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**.

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