

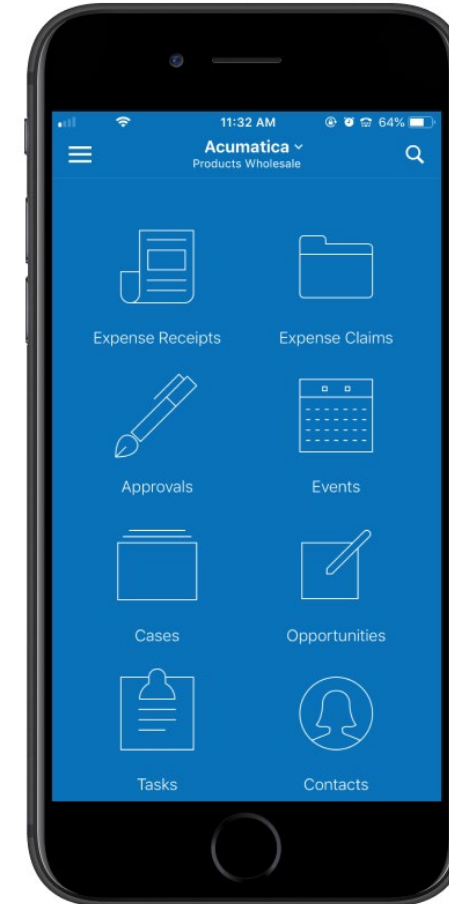
Acumatica – Field Service Edition

June 2020

Webcast agenda

Acumatica Cloud ERP – Field Service Edition

- About NexTec Group
- Understanding the benefits of Cloud ERP
- Give your field techs with key information to customers better
- Assign inventory from the warehouse to the field
- Improve work order management including escalation management
- Gain efficiencies in scheduling your service calls
- Acumatica Cloud ERP Demo



About NexTec

An award-winning business technology consultancy

ERP, CRM, BI, Cloud and On-premise solutions to small and mid-sized businesses

Over 600 customers nationwide across multiple platforms

Industries:

- Professional Services / Field Services
- Wholesale / Distribution
- Manufacturing
- Pharmaceuticals / Nutritional Supplements
- Distribution / Supply Chain Management
- Food and beverage
- Chemicals
- Medical Devices



ESTABLISHED IN
1994

12 countries supported

50 USA states supported



95%
annual client retention rate

25 years helping mid-sized business with **ERP, CRM and BI software**

13 years

Accounting Today's
Top 100 Resellers

50% of clients chose **NexTec** after working with another provider

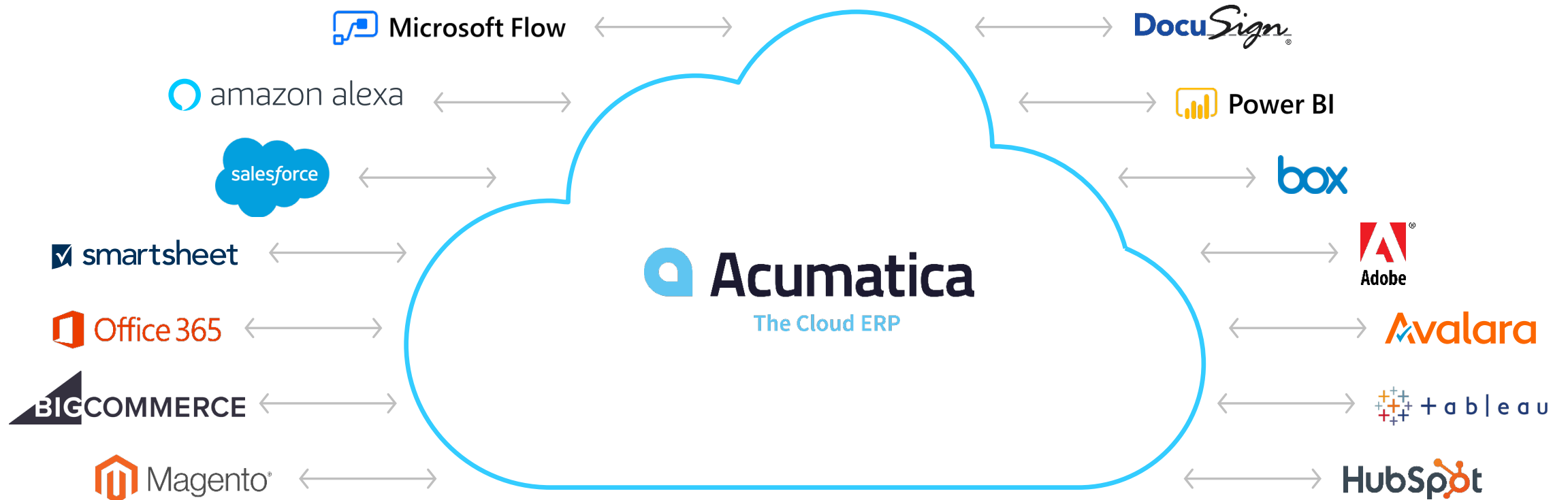
600+ Acumatica, Microsoft, Sage and Salesforce **customers**

Acumatica - Field Service Edition

Cloud ERP

Open architecture and rapid integration

Acumatica Cloud ERP



Access from anywhere, on any device

Acumatica Cloud ERP



Flexible deployment options

Public, Private or On-premise

Public Cloud



Private Cloud



On-premise



Acumatica Cloud

SaaS offering

Acumatica Cloud
Server and database

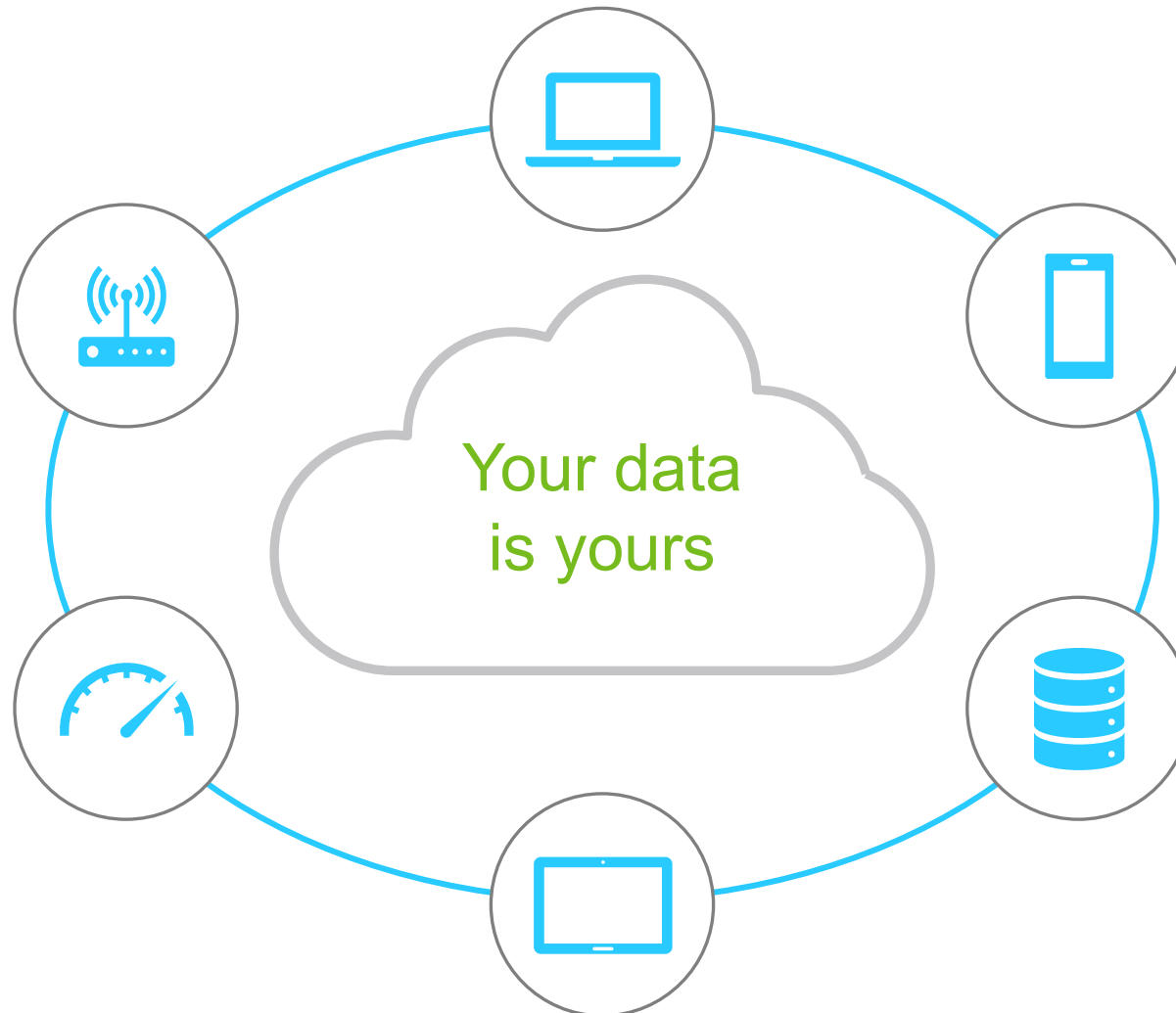
Hosting or cloud provider

Acumatica Cloud
Server and database

Customer office or datacenter

Data ownership

No matter where you decide to host your data, it is secure



Acumatica industry editions

Supporting the unique needs of many industries



Field Service
Edition

 **Acumatica**
The Cloud ERP



Commerce
Edition



Construction
Edition



Distribution
Edition



Manufacturing
Edition

Acumatica - Field Service Edition

Benefits of automating field services operations

Scheduling, Dispatching
and Call Center →

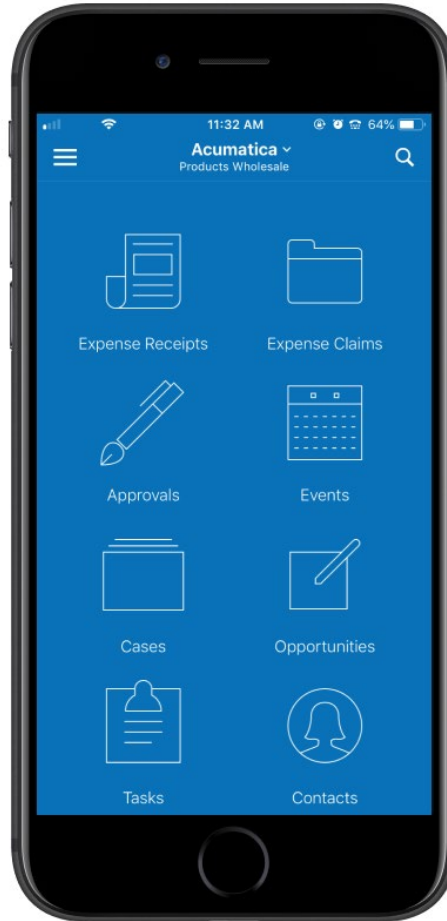
Route Planning →

Maps Integration →

Mobile Service Management →

Emergency Service Calls →

Equipment Maintenance →



← Inventory Management

← Service Contract
Management

← Warranty Management

← Dashboards and
Business Intelligence

← Team Approach to Sales
and Service

← Track Projects and Costs

Scheduling and map routing

Acumatica - Field Service Edition

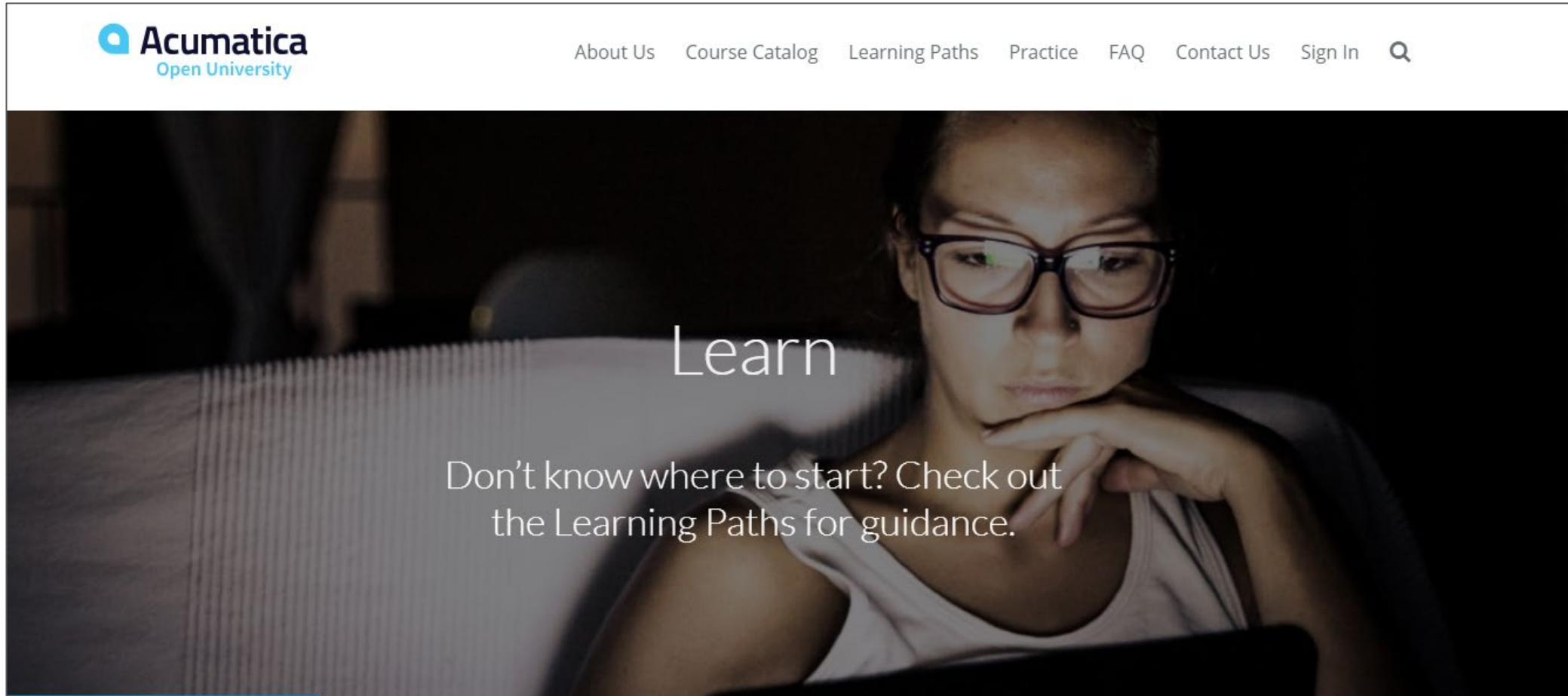
Visual Scheduling Board

The screenshot shows the Acumatica Visual Scheduling Board for 'Revision Two HQ - Calendar Board'. The interface includes a navigation menu on the left with options like 'ENTER', 'Service Orders', 'Appointments', 'Sales Orders', 'Cases', 'BOARDS AND MAPS', 'Calendar Board', 'Staff Calendar Board', 'Room Calendar Board', 'Staff Appointments on Map', 'MANAGE', 'Customers Central', 'Services', 'Stock Items', 'Equipment Types', 'Equipment', 'EXPLORE', 'Appointment Inquiry', 'Service Order Inquiry', and 'Posting Batches'. The main area displays a calendar grid with columns for staff members: Andrew Michael, Mr.; Baker Maxwell, Mr.; Beauvoir Layla, Ms.; Becher, Joseph; Bloom Todd, Mr.; Bravner Pam, Ms.; Bujacek, Michal; and Chubb Da. The grid shows various appointments with details such as 'Service Order ID', 'Customer', 'Service Order Type', and 'Status'. A detailed view for service order 003623-1 is shown, including 'Service Order ID: 003623', 'Service Order Type: Maintenance, repair and operations', 'Description: Data Base Maintenance', 'Customer: Ellis Rowling', 'Phone: +1 (777) 423-6795', 'Status: IN PROCESS', 'Start: 2015-05-12 07:00', 'End: 2015-05-12 08:00', 'Item Class: Tech Support', 'Description: Data Base Support', 'Duration: 1h 0m', 'Staff: Bujacek, Michal', and 'Resources: None'.

Google Map Routing

The screenshot shows the Acumatica Google Map Routing interface for 'Revision Two HQ - Staff Appointments on Map'. The interface includes a navigation menu on the left with options like 'ENTER', 'Service Orders', 'Appointments', 'Sales Orders', 'Cases', 'BOARDS AND MAPS', 'Calendar Board', 'Staff Calendar Board', 'Room Calendar Board', 'Staff Appointments on Map', 'MANAGE', 'Customers Central', 'Services', 'Stock Items', 'Equipment Types', 'Equipment', 'EXPLORE', 'Appointment Inquiry', 'Service Order Inquiry', and 'Posting Batches'. The main area displays a Google Map of the New York City area with a route highlighted in green. The route starts at the HQ location and visits several appointments. A 'Route List' on the left shows the following appointments: Baker Maxwell, Bernia Mar..., Bloom Tod..., Bravner P..., Bujacek..., Chubb Dav..., Correa Jas..., EPO000 - O'Neill's Trading, EPO000 - Midwood Ambulance, EPO000 - MUSIC AREA, EPO000 - Parterson Int., EPO000 - Agrilink Food, Coza Eric..., and Domenico... The map shows the route starting at the HQ location and visiting these appointments in sequence. A table at the bottom right shows the 'Appointments for Baker Maxwell, Mr. (3)' with columns for Appointment, Route/Customer, Service Type, Travel Time, Services Duration, Postal Code, and Address. The table lists three appointments: EPO000002-001 (Widget Credit Card, Maintenance, 0 min travel, 2h 0m services, 10025 postal code, 318 Duke Ellington Blvd., NY, New York 10025, US), EPO000002-001 (Asahi Sun Tours, Maintenance, 24 min travel, 2h 0m services, 10032 postal code, 201 Warren St., NY, New York 10032, US), and EPO000002-001 (Beetype Image, Maintenance, 27 min travel, 4h 0m services, 11224 postal code, 3951 Neptune Ave., NY, Brooklyn 11224, US). The route summary shows a 'Route Time: 0h 52m', 'Route Distance: 21.3', and 'Number of Appointments: 3'.

Free training



<https://openuni.acumatica.com/>

Compliance



SOC Type 1 & 2

PCI DSS level 1



150+

ISVs

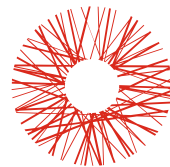
Acumatica named Best Cloud ERP Solution, Best Manufacturing Solution, Best ERP Software

SIIA CODiE AWARDS



Acumatica noted/ranked highest in
customer satisfaction and usability

Gartner[®]



NUCLEUS
RESEARCH

G² | CROWD

| **nextec**



Acumatica Product Demonstration

Field Service Edition

Upcoming events

nextecgroup.com/events

- **Acumatica – Salesforce Connector**
Wednesday, June 24 at 2:00 - 3:00 PM EDT
- **Acumatica – Manufacturing Edition**
Thursday, July 16 at 2:00 - 3:00 PM EDT
- **Acumatica Summit 2021**
January 24-29, 2021
Wynn Las Vegas, Las Vegas, NV
To register
<https://summit.acumatica.com/>

nextec

Questions?
