FIELD SERVICES

BEGINNERS GUIDE TO ERP

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Beginner's Guide to ERP:

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Field Services

Conducting work at a customer's site creates no shortage of challenges, inefficiencies, and opportunities for delays and bottlenecks.

MISSING PARTS AND WARRANTIES, scheduling errors, charge rates, and traffic fluctuations can all wreak havoc on technician schedules, time spent in the field, and overall customer satisfaction. What's more, as many companies are exploring remote work opportunities, it's becoming increasingly essential to streamline communication with remote workers.

Challenges facing field services operations

Field service teams are always grappling with new challenges. From HVAC, plumbing, or electrical services to computer repair to construction, service employees and their managers must continuously adapt to new threats and obstacles that impact how they work and serve their customers. Core challenges for field services include:

✔ Disconnected Systems

For many companies with field service departments, sales, financials, supply chain management, and field services data exist in separate systems, with no apparent connection between them. The disconnected information leads to confusion and a lag in decision-making, which, in turn, can lead to loss of revenue.

✔ Efficient Scheduling and Dispatching

Schedules play a critical, albeit difficult role in the day of a field technician. Too many appointments can overwhelm the schedule and practically ensure the field tech will be running late to the next customer or unable to do a thorough job. Too few appointments reduce the day's revenue potential.

✔ Health and Safety

In the face of a pandemic and social distancing, service workers that need to meet face-to-face with clients or enter their homes are experiencing new risks. Proper protective equipment, hand washing, and other measures are crucial to keeping them safe while on the job.

Field service teams face unique challenges on a daily basis that continue to grow in complexity. These challenges emphasize the ongoing need for business software that can unify and simplfy field service operations. Enteprise Resource Planning (ERP) software is a critical tool that can solve the most pressing challenges of field service teams.

Inventory and Warranty Management

Customers rely on field techs to know their warranties and have the right tools and parts on the service call. However, unless the customer's warranty information is readily available, the field technician may not know which parts are under warranty, resulting in under- or over-payments, confusion, and upset customers.

Field Communications

Field workers and in-house teams communicate back and forth regarding client information, parts lookup and ordering, and schedule changes. However, this communication doesn't always happen in real time, and any delays in response could lead to longer delays for the customer. Getting up-to-date data over mobile devices is not easily done.

ERP explained

Enterprise Resource Planning software (ERP) is valuable software used by most modern businesses to streamline processes and provide more significant insights into operations.

ERP SOFTWARE SERVES as a centralized platform for all major areas of a company, including finance, production, sales and marketing, scheduling, inventory, human resources, field service, and customer service.

Available in the Cloud or on-premises, ERP systems are designed to connect all areas of the business and allow teams to share information in real time.

The strength of ERP lies in integration. All data related to products, services, customers, inventory and more is integrated into one system and each department can bring up the data as they need it. Data

from each department is shared across the enterprise and can be centrally accessed and leveraged. In this way, an organization can see the big picture and make more informed business decisions using the shared data.

ERP's benefit to field service teams can be seen at both the company and the individual level. Each employee can have the ability to access information in real time and update it immediately during the service appointment. It is also highly valuable to field service managers and corporate leaders who can view data holistically, track progress toward company objectives, and make informed decisions.

The benefits of an ERP solution

There are significant financial, operational, and customer service-related benefits to having an ERP drive your company and field services team. Companies that invest in ERP often see the Return on Investment (ROI) quickly and over time, making it an investment for the short- and long-term. Its primary benefits include:

Visibility

ERP's core focus is to give you increased visibility into how your business operates and performs. By leveraging your own data on a big picture level, you are able to identify operational bottlenecks, make accurate forecasts for labor demand, monitor and replenish inventory, and maintain productivity across the board.

Integration

ERP centralizes disparate systems and processes to create a unified approach to business management. By integrating company data into a single source of truth, you can feel confident the information you are reviewing is consistent, accurate, and up-to-date.

Streamlined processes

By integrating data, you can dial in on your business processes and identify what is working and what can be improved. ERP can automate processes like approvals, communications, and document flows and remove delays and inaccuracies created by manual input.

Collaboration

Because ERP serves as a single source of truth, you are in a better position to collaborate using the same data across the company. You can view, edit, share, and use the same data resources in real time to improve clarity and reduce the risk of loss associated with hardcopy files.

Business growth

ERP systems are designed for scalability. As your company grows into new markets and services, your ERP software can accommodate rapid changes in size and scope without the need to purchase additional servers or hardware.

Data Security

Safeguarding company data against potential breaches, system takeovers, or other cyber threats remains a top priority. If the system goes dark, it can paralyze your field service teams. They will not know where to go or what service to perform at the location. Top-notch ERP systems secure your data and ensure your field service team keeps running efficiently.

Compliance

Meeting and staying within compliance standards is a major task, which can vary depending on your unique industry. ERP can help you track compliance progress to ensure no details have fallen through the cracks that could result in costly fines.

Competitive advantage

No matter your service, you are facing increasing competition from local companies and large-scale organizations alike. Using an ERP to keep a check on market conditions, productivity, and other business impacts will prepare your company to shift with the market and allow you to stay competitive.

Mobile functionality

An essential requirement for remote workers is mobile access to data. Cloud-based ERP offers mobile functionality so that field technicians can get the information they need in real time while on the job and eliminate back-and-forth communications with the home office. If an address is corrected, time of scheduled service changes, or if the service need changes, the technician will see it as soon as it is entered into the ERP system.

Customer insights

There is no doubt that customer service is a top priority among customer-facing teams. ERP provides a 360-degree view of customers - from the first sale through warranties, contracts, parts used, and past order history. The 360-degree view allows you to learn more about your customers and their experiences, including billing challenges, customer lifetime value, trends, and new product ideas.

IT expenses connected

IT departments for service providers often face a sizable challenge budgeting and tracking expenses and resources. They often need to use separate systems to record and track, depending on the department or service. ERP combines everything into one platform, reducing hours spent, and error significantly. IT professionals can budget and track better and spend less time and hassle managing multiple interfaces and applications.

Customization

An ERP system can be customized to fit your unique business needs and expectations and function in a way that makes sense to your operations. You can also integrate ERP with other leading business software tools, such as Customer Relationship Management software (CRM) and Business Intelligence software (BI).

Better planning

One of ERP's most important functions is its ability to collect, store, and share data across the organization. With ERP, you can build efficiency and business continuity into your operations. ERP also provides historical data to improve your planning over time and develop a well informed long-term strategy.

Core features of an ERP solution

Here's a closer look at some of the main capabilities to look for in a comprehensive ERP.

✅ Financial management

- » General ledger entries and balancing
- » AP/AR
- » Expense management and reports
- » P&L statements
- » Budgeting
- » Fixed asset management
- » Cost accounting
- » Analytical accounting
- » Payroll management

✅ Sales management

- » Pricing quotes and discounts
- » Contracts and open orders
- » Service fulfillment
- » Contract renewals
- » Customer inquiries
- » Lead source tracking
- » Customer lifetime value and service history
- » Sales commissions
- » Parts scheduling and shipping

✅ Inventory management

- » Warehouse management, including multiple sites
- » Item traceability, forward and backward
- » Low quantity alerts
- » Rule-based automatic reordering
- » Transaction management
- » Shelf-life management
- » Inventory costing
- » Use of barcoding and RF data
- » Integration with purchasing and procurement data
- » Location-specific shipping and dispatching
- » Check-in/check-out items by user

✅ Purchasing & procurement

- » Purchase requisitions
- » RFP management
- » Purchase orders
- » Multi-level approval processing
- » Subcontractor management
- » Invoice tracking
- » Contract management
- » Returns management
- » Project and cost tracking

✅ Customer relationships

- » Salesforce integration and automation
- » Marketing campaigns
- » Customer support

In addition to the list above, here are the specific requirements to look for in an ERP with field service functionality.

✅ Warranty management

Managing warranties is an essential part of any field services operations, but it can consume a lot of time and resources. An ERP that includes warranty management will save you time and remove any guesswork on the warranty's status and details.

✅ Invoice generation

Field techs need an easy way to generate accurate invoices while on a service call, ideally without having to call a central office for prices or other details. An ERP with invoice generation will let the employee type in services performed, auto-generate an invoice during the service call, and review it with the customer. ERP can help ensure the customer is charged accurately and isn't surprised by the invoice totals.

✅ Equipment servicing history

With ERP, you can keep an accurate record of all work performed at a customer's location and equipment used. You can also anticipate parts needed before a service call, schedule future maintenance calls, or offer renewal contracts.

✅ Scheduling tools

Emergency service calls, traffic delays, and appointments that take longer or finish earlier than anticipated can all rock the scheduling boat and create bottlenecks and inefficiencies. ERP can help mitigate the impact of poor scheduling by automatically adjusting a tech's schedule according to real-time traffic data, optimized route planning, and open time slots. Your service workers won't be overloaded with appointments or spend too much time on the road and your customers won't be disappointed. Your dispatchers can use the advanced scheduling tools to assign jobs to techs based on their current routes and locations and minimize time spent on the road.

✅ Contracts management

Renewal contracts are a significant revenue source for service providers. An ERP with contract management makes it easy to track contract details and alert you of upcoming renewals to capitalize on repeat business. It also allows for easier preventative maintenance scheduling and quoting based on contract terms.

Warehousing and truck inventory

Standard inventory management software cannot track parts and equipment stored in company vehicles or inventory spread among multiple warehouses. Without knowing the actual status of your inventory, you may misplace or over order parts and create a drain on company profits. ERP integrates inventory with purchasing and procurement for a complete picture of item quantities, costs, and whereabouts. Users can also submit requests to have specific components transferred to other locations on an as-needed basis.

Multi-site management

Service providers with multiple satellite offices and warehouses can unify their locations under ERP. They can collect data at the location level as well as review it across the organization to identify the needs for expansion, consolidation, or performance improvements. It also allows companies to track resources between locations.
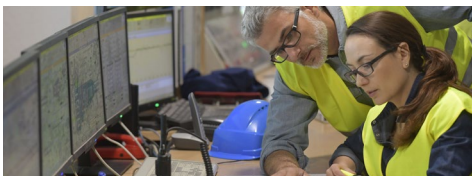
How to choose the right field services ERP system

When it comes to selecting an ERP for your business, consider the following:
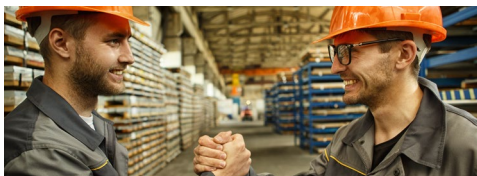
Organize a project team

Organize a project team with key members from around your company will be charged with evaluating and selecting the ERP system and choosing a partner to help implement the ERP.

Complete a needs assessment

Complete a needs assessment to identify the features, functions, and capabilities your company requires from an ERP. This assessment should also include an evaluation of your existing software and tools that may be eliminated after the ERP has been implemented.

Determine the criteria

Determine the criteria you will use to evaluate vendors and their solutions, including a list of your prioritized needs. A matrix of your desired features, appropriately weighted, can help evaluators and assist in the final selection.

NexTec Group recommends Acumatica – Field Service Edition for companies with field service workers. It wins multiple awards for its cloud-based ERP and is considered one of the best business management solutions for companies with field service teams. Acumatica is built to run your entire company from finance,accounting, operations, supply chain to sale, field services, and more. The Field Service Edition comes with a mobile app that allows remote workers to get the latest information in real time. Learn more at nextecgroup.com/field service.

About NexTec Group

NexTec Group is a leading provider of business technology, specializing in ERP, CRM and BI software that grows with your business now and in the future.

For over 25 years, we have been helping companies connect data and systems, update out-of-date software, ensure compliance, and streamline operations with the goal of saving you money and increasing your profits. NexTec is a gold-certified Acumatica partner with deep experience in field service, manufacturing, distribution, professional services, and more. Embrace technology and transform your business at nextecgroup.com.

About the NexTec Group

NexTec Group is one of North America's largest and most experienced technology consulting firms, specializing in industry-specific solutions for mid-sized organizations. For nearly 30 years, NexTec has been a trusted partner to businesses, delivering, implementing, and supporting the core Enterprise Resource Planning (ERP) and Business Intelligence (BI) solutions they need to scale and grow. With seasoned consultants from coast to coast, and a premium portfolio of innovative business management solutions including Acumatica, we help you get the most out of your technology investments.

Visit www.nextecgroup.com or follow us on LinkedIn.

Contact us to learn more:
844-466-8477

info@nextecgroup.com
NexTecGroup.com

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