FIELD SERVICES MANAGEMENT

ERP SELECTION GUIDE

Acumatica
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ERP Selection Guide:

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Field Services

As work-from-anywhere trends continue to apply to more than just technicians, field service operations are facing increasing needs to manage and monitor business activities, with or without a central office location.

MODERN FIELD SERVICE OPERATIONS consist of a myriad of moving parts; finances, inventory, scheduling, personnel, documents, and data must work harmoniously to streamline service to customers and maintain profitability. For teams to work together across the organization, they all need access to the same data in real time.

For companies with field service teams, up-to-date data is especially important. Without it, scheduling changes may be missed, parts needed may not be taken to the job site, or other complications may arise.

Outdated software and disconnected systems designed to tackle only part of the operational puzzle don't allow for big picture visibility, which can significantly impact management's ability to make key business decisions.

The key to bringing teams and data together is Enterprise Planning Resource (ERP) software with field service features that can be accessed anytime and anywhere. A powerful ERP solution brings all of your resources, scheduling, data, and more into a single platform that can be accessed and managed in-house or offsite.

Selecting an Enterprise Resource Planning (ERP) solution accessible to your field service teams can put you miles ahead of the competition.

Choose a Cloud ERP for your field service management

Every field worker will attest that anything can happen to change their service schedules at any time. A project may take longer than planned, an emergency service call disrupts the other planned service calls for the day, or missing parts require a return back to the office, changing the schedule and upsetting customers.

It happens to all service teams, be they HVAC workers, engineers, property maintenance workers, computer or telecom technicians, or construction workers. Two-way communication between field techs and home base is essential to maintaining the ability to serve customers. Without an easy way to get the latest information, bottlenecks are created, resulting in slow response, time delays, and upset customers.

ERP is the solution to bring the data together. A Cloud ERP will make the data available in real time so your field technicians and other customer service teams will be able to get the information they need, make sure they have the right parts with them, and see updated dispatch schedules as changes happen throughout the day. They also can get quick answers to their questions and respond to customer questions immediately. Cloud ERP eliminates much of the back-and-forth required by on-site personnel when making adjustments to schedules and routes, locating information needed by a tech, and getting price estimates.

Field service managers can leverage the Cloud ERP's business intelligence features, such as financial reports, inventory reports, and service contract management to get deeper insights into operations that make it easier to forecast needs and improve overall service.

An ERP designed for field services provides a 360-degree view into business operations, which can contribute to elevated customer experience, increased profits, and greater competitive advantage.

Benefits of integrated ERP for field services

Some of the benefits of ERP software with field service management (fsm) include:

A connected company

One of ERP's inherent traits is its ability to integrate data from all over the company into one system. For example, scheduling is typically managed via scheduling software and has little or no interaction with inventory. ERP makes it possible for companies to unify departments and avoid knowledge gaps.

360-degree view of customers

From service dates and contracts to total lifetime value, ERP gives companies a 360-degree overview of their customers. It can deliver insights into individual customers, such as dates and costs of service and the technicians who have served them, as well as general customer data, such as where your customers live, how they're referred to you, and other trends.

Big picture insights

Field service providers often have multiple technicians, vehicles, and equipment out in the field at any given time. It can be difficult to manage all the moving people and parts, but it is important that they operate as one unit. ERP creates a single source of truth from which all departments and participants can operate together as one. ERP serves as a central anchor for information to enhance communication and deliver big picture insights into a company's health and status at any given time.

Insider Tip: The more you know about your customers, such as service history and products used, the better you can upsell other services or attract more customers just like them.

Cloud ERP streamlines data collection and retrieval

Streamlined customer service

Customer service is the name of the game. It doesn't matter if field service workers are replacing a condenser unit or making a quick service delivery, their main job is to make sure your customers are happy.

Service workers are the face of your company, and the quality, speed, and responsiveness of the service they provide can have a lot to do with whether your customers will renew their service contracts or recommend you to others.

A field service provider can improve a customer's experience by giving service employees mobile access to the ERP system. With ERP mobile access, an employee can look up pricing, request parts from the warehouse, pull documentation, and learn more about the customer's needs while on location without having to call back into the main office.

Improved financial control

Regardless of your reputation in the community or number of customers and contracts, no service provider can stay in business if they can't maintain profitability. One of the major benefits of a Cloud ERP is the ability to access up-to-the-minute financial records and have a good understanding of company health in real time.

Employee education and empowerment

Technicians in the field run into countless "firsts" that can stop them in their tracks, such as:

> » Do I leave the bad part at the customer's house or take it with me?
> » How do I conduct a faulty part return?
> » What do I need to charge the customer for this service call since it didn't follow our normal procedures?
> » This part is discontinued, so with what can I replace it?

A Cloud ERP with customizable workflows can remove a lot of the guesswork and allow the technician to complete projects with confidence. This ensures a consistent repeatable process, regardless of who is serving your customers. Plus, it allows technicians to get answers to their toughest questions and maintain professionalism at all times.

The right tools in the field can elevate service to the customer.

Features and functions to look for in a field services ERP

Some of the most attractive ERP features that are increasing efficiency, savings, and level of service for field service providers include the following:

✓ Scheduling and dispatching tools

One of the most useful functions of an ERP designed specifically for field services is scheduling and dispatching tools. These tools can shorten the time from call receipt and job assignment, help management adjust staff and resources as needed, and update schedules in real time.

✓ Inventory management

Field service providers may have thousands of various parts and components on hand at any given time. Equipment and tools are usually spread throughout various warehouses, which can make it difficult to track down individual items when they're needed. What's more, many companies fail to keep an accurate count of items in their trucks, which could affect expense reports, inventory usage, and procurement.

An ERP designed for field services should have a full suite of inventory tools designed to meet these challenges. With the right ERP, items can be tracked by specific location and updated in real time as items are used, sold, returned, or borrowed. In true ERP fashion, inventory and ordering can be integrated to trigger reorders when certain items get below a set threshold.

✓ Service contracts management

Renewal contracts are a large source of revenue for field operations. A well-designed ERP helps you manage service contracts by notifying you of upcoming expiration dates and managing service schedules. This also ensures you have enough time to order parts and components you know your customers will need as part of their service call.

A Cloud ERP integrates the sales and service operations of your business by combining data related to inventory, ordering, delivery, installation, and dates of service work performed in the field. This allows you to schedule preventative maintenance for customers and create recurring contracts and schedules with ease.

✅ Warranty information

Warranty management is a time-consuming task without a good management system. A cloud-based ERP simplifies how you manage warranty information by creating a searchable repository for your customers' parts and components. Multidimensional functions can track the various warranty periods for each component to ensure customers are charged fairly.

Your customers depend on you to know the status of their warranties.

✅ Route planning and map development

The more time field techs spend on the road, the less time they have to serve customers. Companies can optimize drive times by pre-planning routes. Look for an ERP that includes tools designed to simplify route management and give dispatchers and techs a visual overview of where jobs are located each day. If the ERP includes mapping tools that are powered by Google Maps, the routes will automatically change based on real-time traffic conditions to further improve travel times.

Integrated mapping tools can streamline routes for service techs. Rather than using their own navigation and manually typing in each address, routes and maps can be sent straight to the tech's phone for faster deployment.

An ERP with route planning can optimize schedules and save time and money.

Mobile ERP accessibility

Older applications and legacy systems that require on-premise hosting and access cannot properly serve technicians in the field. A cloud-based ERP enables all users to access the platform from any connected mobile device for faster data entry and information lookup. This also reduces hardware and hosting expenses for the business, as well as the need for costly upgrades and updates when new features or improvements become available.

Business intelligence dashboards

ERP gives companies a bird's eye view into operations, bringing together multiple data sets for increased business intelligence. Customizable dashboards can display key information at a glance to reduce the amount of time spent looking for specific data sets. Users can also personalize individual dashboards to get the information that matters most to them.

Emergency service calls

Unplanned service calls can throw a technician's schedule into a tailspin. ERPs with visual planning tools send changes in service orders and scheduling directly to the tech's phone. This also allows dispatchers to understand how unplanned service calls affect scheduling so they can assign the call to the tech that will result in the least amount of impact.

Project and cost tracking

From small one-location service calls to large-scale projects across multiple locations, ERP simplifies project management across the organization.

Tasks, equipment, and people can all be managed from the same platform for comprehensive visibility into timelines and budgets. You can also track time, material costs and usage, and completion rates to keep projects on target (and on budget) and make real-time adjustments when necessary.

Equipment maintenance schedules and records

While service providers are concerned with helping customers maintain their equipment, it's important not to overlook your own maintenance needs. Ongoing maintenance of your equipment can keep it in good working order for longer and avoid costly problems associated with wear and tear.

Tracking costs in real time can keep projects on target.

Acumatica Cloud ERP - Field Service Edition

NexTec Group recommends Acumatica - Field Service Edition for companies with field workers and teams that make service calls.

Acumatica wins multiple awards for its cloud-based ERP and is considered one of the best solutions for not only field service management, but also managing the entire business. It brings everything together, including sales, purchasing, service, operations, inventory, supply chain, finance and more.

Why Acumatica for Field Service Management?

Acumatica's Cloud ERP - Field Service Edition is designed for real-time business productivity, decision-making, and intelligence. With features developed exclusively for field service operation and integrated into the platform (not added on as an extra application), Acumatica's

unique toolset is unmatched by any other ERP solution. Its cloud-based accessibility supports the work-from-anywhere trend that is fueling today's business climate and creates a strong foundation for business continuity and resiliency.

Designed for mobile access for anywhere at any time, Acumatica can connect through any device with a browser or with the native mobile Android or Apple iOS (iPad) app. Acumatica Cloud ERP - Field Service Edition enables your field workers to manage their scheduling and delight your customers consistently. At the same time, it gives management a comprehensive real-time view of business operations from end-to-end.

Benefits of automating field services operations
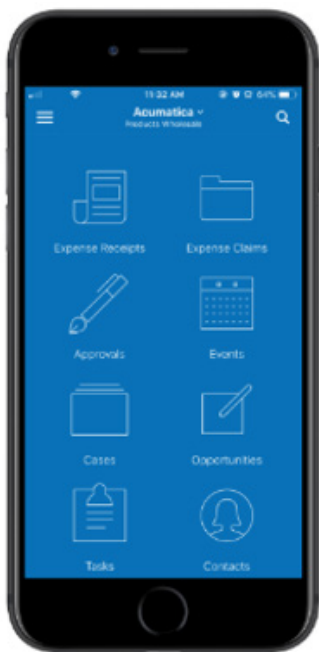
Inventory Management

Service Contract Management

Warranty Management

Dashboard and Business Intelligence

Team Approach to Sales and service

Track projects and Costs

Scheduling, Dispatching and Call Center

Route Planning

Maps Integration

Mobile Service Management

Emergency Service Calls

Equipment Maintenance

Stronger with NexTec

NexTec is a gold-certified Acumatica implementation partner with more than 25 years of experience in consulting and industry.

Throughout our history, NexTec has focused on giving our customers the best software options found anywhere. In addition, our consultants are very experienced in ERP and come from the industries we serve.

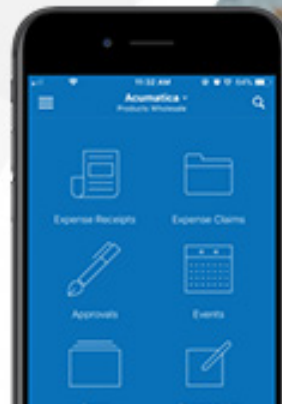Our goal is to deliver a successful ERP implementation that supports your key business initiatives and drives tangible growth across your field services organization. To date, we've served more than 600 companies with ERP, CRM, and BI solutions — and we're looking forward to putting our expertise to work for you.

Manage service better. Visit NexTec's field service page to watch the video today.

About 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. Our over 90% customer retention rate is a testament to the lasting, impactful relationships we build with our clients.

To learn more, visit www.nextecgroup.com or follow us on LinkedIn.

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