Acumatica
THE CLOUD ERP

i i g
Information Integration Group, Inc.

KEY BENEFITS

BETTER INFORMATON

Track and manage every detail of your service organization with Acumatica Service Management.

Share best practices, automate manual processes, and track service inventory by integrating information, people, and resources.

A SINGLE, REAL-TIME VERSION OF THE TRUTH

Service Management is your connection between field service operations, projects, CRM, order management, and inventory management, providing all the required information to generate service appointments from Sales Orders or CRM Cases.

Better business insights and decisions result from the combination of automated processes, accurate data collection, financial analyses, and forecasting capabilities.

EQUIPMENT MAINTENANCE MODULE

Track all details of equipment and products installed at your customers' facilities by make and model. Define schedules for preventive maintenance service orders and associate them to recurring maintenance schedules or contracts. Acumatica Equipment Management is an optional component of the Acumatica Service Management Suite of products.
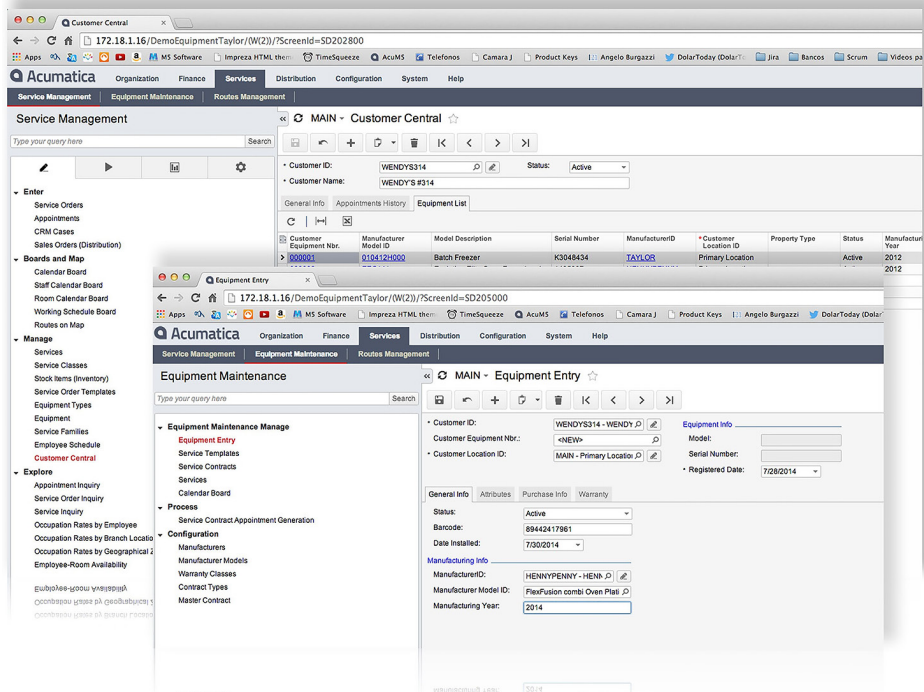
EQUIPMENT MAINTENANCE MODULE BENEFITS

Equipment maintenance inventory – Maintain all details of equipment and products installed at your customers' facilities by make and model.

Preventive maintenance schedules – Define schedules for preventive maintenance service orders and associate them to recurring maintenance schedules or contracts

Warranty tracking – Track warranty classes by models of equipment to prevent needless customer invoicing parts and labor when the work is covered under warranty.

In the cloud and mobile – Access the system anywhere, anytime, from any device. All applications are web-based, giving users with appropriate privileges unlimited access to the system from anywhere in the world.

EQUIPMENT MANAGEMENT'S KEY FEATURES

Service Contracts	Create and manage multiple service schedules for each customer by location.
Master Contracts	Combine multiple contracts by customer.
Appointment Generator	Generate appointments automatically for all service contracts with equipment maintenance requirements.
Service Template	Create templates for a predefined set of services. For example, create a template for the cleanup and calibrate combination for HVAC equipment.
Warranty Management	Establish warranties specifying the specific items under warranty to avoid confusion, mischarges, and objections. Classes can be mixed on the same service order, for instance, a two-year warranty on parts and a one-year warranty on labor.
Invoicing	Capture and invoice for all parts and labor related to the services rendered.
Service Parts	Provide access to service parts inventory and automated sourcing.
Mobile Service Management	Send updated orders and appointments to any mobile device.

ADAPTABLE CLOUD

UP IN THE CLOUD:
All applications are created for the cloud, which means that users with appropriate privileges can access the information from any device with a web browser or on native mobile apps.

DEPLOYMENT OPTIONS:
Acumatica can be installed in-house or in a private or public cloud of your choice. Your deployment and pricing options are designed to ensure mid-market success.

CONNECTED CLOUD:
Built for your business and can grow with your needs. Add capabilities such as CRM and data visualization. The flexible architecture allows for customization without the need for coding.

EASE OF USE:
Staff and customers can collaborate easily and efficiently on Mac, PC, tablet, or phone. Use the built-in User Guide for self-paced learning as roles and requirements evolve.