

Service Management Applications

**COMPREHENSIVE MOBILE SERVICE MANAGEMENT APPLICATIONS
ON A FUTURE-PROOF CLOUD PLATFORM**



“Acumatica is flexible and allows you to do business the way you do . . . We continue to improve our utilization of Acumatica and derive efficiency through business process audit and finance process review within a program of continuous improvement.”

Sean Reuben, CFO, Incubeta
Industry: Marketing and Advertising Services



Complete Service Management ERP

Drive growth with a comprehensive service management ERP application designed for construction, field service, professional service, and managed service providers (MSP). Acumatica includes financials, projects, customer relationship management, construction jobs, field service, purchasing, sales, and inventory applications.

Field service and construction organizations can schedule appointments, manage equipment, and track warranties and contracts. Native mobile apps empower remote workers with GPS navigation, voice-dictation for notes, and image capture via mobile devices. View equipment details and service history in

the field. Start service orders, capture electronic signatures, issue inventory items, capture expense receipts, and complete orders from any device.

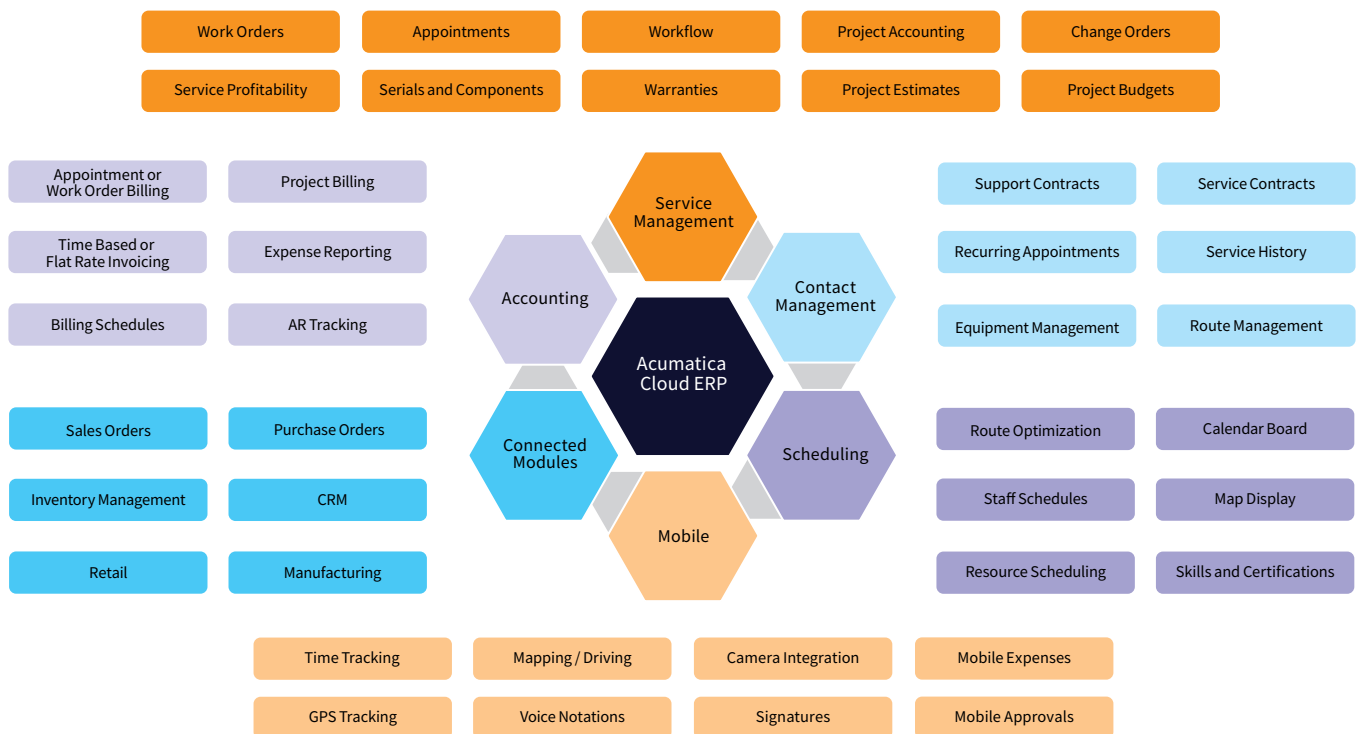
MSPs can log support cases, manage support contracts, and measure service level agreements with an online customer portal for self-service.

Professional service organizations can create and manage project estimates and budgets with configurable project billing. Create and assign project tasks, compare estimates to actual costs, and automate time and expense entry.

“We’ve torn down the silos we had with the client-server solution, so now we have access in one view of the data. We’re now able to see where we are cost-wise with our existing construction projects; we’re able to look at the profitability of each project, look at the customer base and understand where we are most successful.”

Jeff Hamilton, President, Roberts Glass & Service
 Industry: Specialty Trade Contractor










[VIEW SUCCESS STORY](#)





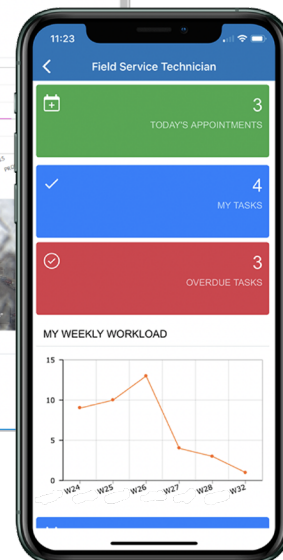
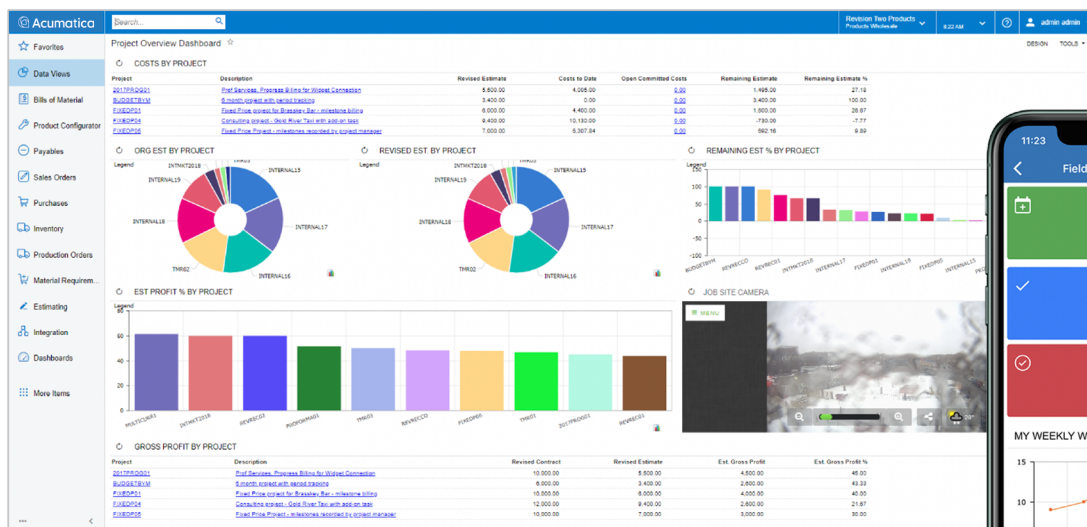


Deep Industry Functionality

Service companies have varied needs often unmet by traditional ERP applications. Acumatica provides a broad set of adaptable business applications enabling service companies to configure the application to meet their specific business and industry needs. Construction service companies enjoy robust project accounting for job management with native field service for appointment scheduling and mobile applications for technicians. Professional service organizations leverage project accounting with task entry and flexible billing. Field service companies across diverse industry segments manage equipment with serial numbers, warranties, and equipment details. The Service and Support application is essential for managed service providers with case management and customer self-service portals.

-  **Agricultural, Landscaping, and Forestry**
agricultural services, irrigation, landscaping, forestry services
-  **Commercial Services**
food and restaurant equipment and services, other commercial services
-  **Construction, Plumbing, Electrical, and HVAC**
fasteners, hardware, plumbing, heating, cooling, valve fittings
-  **Engineering, Architecture, and Surveying**
engineering, research and development, architecture, surveying
-  **Medical and Health Services**
home health services, traveling nurses, medical equipment services
-  **Home Services**
garage door, pool, appliance, spa, water system and other services
-  **Janitorial, Sanitation, and Maintenance**
janitorial and sanitation services, facility maintenance and management
-  **Manufacturing Services**
product, equipment and supply deliveries, installation and repair
-  **Motor Vehicle and Transportation Services**
vehicle window replacement, towing and hauling, other services

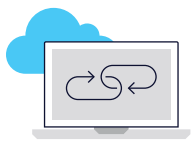
-  **Oil, Gas, and Mining Services**
oil and gas field services, exploration and mining services
-  **Pest Control**
extermination, insect and pest control and removal services
-  **Professional Services**
consulting, business management, advertising, marketing
-  **Safety and Security**
security system monitoring, safety management and training
-  **Staffing Services**
employee staffing and labor-related services
-  **Technology Services**
managed computer and application services, audio visual installation
-  **Utilities and Communication Services**
electrical, water, solar, energy, telecommunications, and other services
-  **Veterinary Services**
equine, cattle, and farm animal health services
-  **Wholesale Distribution**
product, equipment and supply deliveries, installation and repair



Access the entire Acumatica application anytime, anywhere, from a browser or mobile device. Monitor key performance indicators, capture expenses, and manage time entries and exceptions to avoid missing parts, service delays, and other issues.

Device-Agnostic Mobility

Mobility is critical for service organizations. Connect remote workers and back-office managers in real-time with appointment updates, schedule changes, technician and consultant location via the mobile app, equipment and project information, and appointment status. Remote workers can review documents and access checklists from any device with an internet connection. On-the-go executives have real-time data in the palm of their hand, including mobile dashboards, employee approval requests, time cards, and expense receipts.



Extend Acumatica with Certified Applications

The Acumatica Marketplace is one of the leading communities of independent software vendors with integrated applications for budgeting and planning, electronic data interchange (EDI), equipment rental, quality control, logistics and shipping, container management, process manufacturing, and more.

My dispatchers are thrilled to pieces to have the calendar board, the flexibility to move appointments around as they see fit, the flexibility to assign different technicians to those appointments. Also, it affords us the ability to see who's out there, who's working, and how long they're expected to be on that appointment so we can be more efficient with our estimates to our clients about when we expect to have a technician on site . . . Open tickets—they can see if somebody has been assigned to it. They can see what the progress is on that ticket. Is the technician on their way? Have they arrived?"

Jennifer Harler, COO, DP Air Corp.

Industry: Construction, Plumbing, Electrical, and HVAC

Discover Why Service Companies Rely on Acumatica for their Success



LAUNCH THE VIEWER



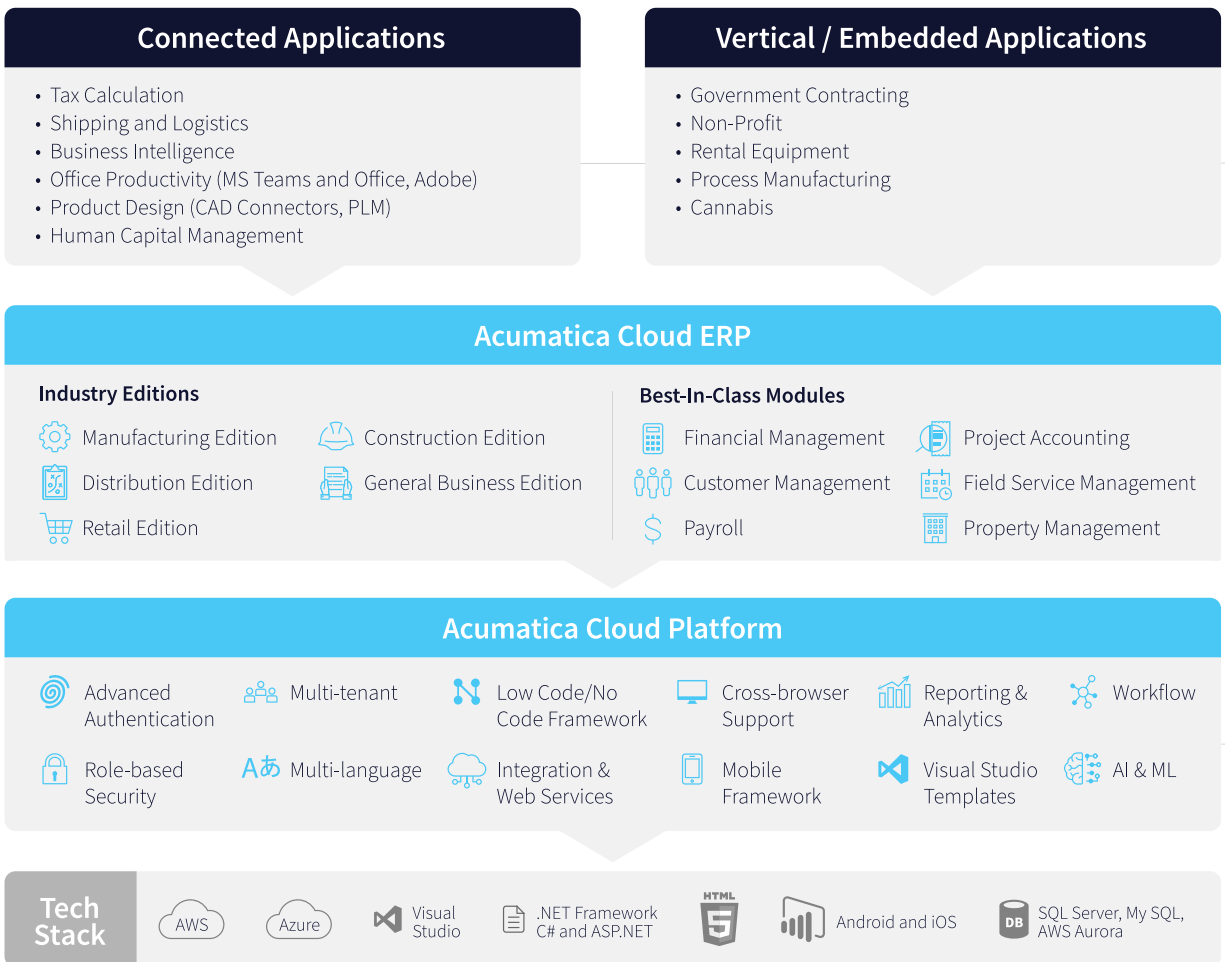
Future-proof Cloud Platform Ready for Modern Technologies

Service companies demand a modern platform built for speed and extensibility to connect external systems and data.

The Acumatica xRP platform is a versatile architectural framework and application development platform that empowers service companies to tailor the software to the way they do business. Because Acumatica's ERP platform technology uses standard web technologies

and development languages, you can modify your business logic using the platform tools or a different integrated development environment.

The platform is built on the world's best cloud and mobile technology. Leverage Open APIs to connect to the Internet of Things (IoT), capture data in real-time through machine interfaces, or automate your warehouse with robotics, carousels, and other modern technologies.



The Acumatica xRP platform is more than just technology. It is the foundation service companies demand for the future. Visual workflows, embedded document management, multilingual translations and localization, mobile expense receipts, time management, and other platform-native features are included in the most resilient cloud ERP platform available for midmarket service organizations. Acumatica Mobile Framework provides real-time access to data, and configurability without coding. It connects with mobile device features such as cameras for photos, microphones for voice notes, fingerprint recognition for security, and GPS for location tracking.

The Trusted Leader in Usability and Value

Acumatica's [Customer Bill of Rights](#) protects customers with an easy to understand End User License Agreement. It guarantees ERP implementations without hidden fees. The Bill of Rights outlines Acumatica's commitment to consumption-based licensing that does not inhibit growth. It provides sustainable pricing models with limited price increases, deployment choice, and consistent customer service access. Further, it protects customers' access to their data, anytime – even if they leave the Acumatica family.

Further, Acumatica is consistently [rated high](#) in both usability and value by industry analysts and users. Acumatica is ranked as a leader in the IDC MarketScape: Worldwide SaaS and Cloud-Enabled Midmarket Business ERP Applications. Advisory services provider Nucleus Research selected Acumatica as a market usability leader in their ERP Technology Value Matrix. The G2 user review site selected Acumatica as a Leader in the G2 Mid-Market Grid Report for ERP Systems. Acumatica maintains a near-perfect Overall User Rating on the Gartner Peer Insights report.

Leader in
Midmarket Cloud ERP



Leader in Usability,
ERP Technology Value Matrix



Leader in Mid-Market Grid
Report for ERP Systems



Excellent
Overall User Rating



Ranked a Champion in
User Sentiment



Acumatica by the Numbers:

6,500 Valued Customers
180M Transactions Every Month
97% User Rating Satisfaction
300+ Dedicated Employees

+33 High Net Promoter Score
200+ Independent Software Vendors
300+ Channel Partners
1 Unique Singular Product Focus

Discover Your Potential ROI with the Forrester Total Economic Impact Calculator™

CALCULATE YOUR ROI





Manage Your Entire Business on a Single, Future-Proof Cloud Platform

Powerful and Comprehensive Service Management Provided by Acumatica Cloud ERP:

Inventory Management

- Replenishment Settings
- Matrix Items
- Physical Inventory
- Pricing, Discounts, Promos
- Customer and Vendor Items
- Packaging and UOM
- Shipments
- Kitting and Disassembly
- Inventory Valuation
- Perishable Inventory
- Lot/Serial Traceability
- Non-Stock Items

Requisition Management

- Convert to Purchase Order
- Predefined Request Lists
- Hide Inventory Lists
- Collect and Request Classes
- Create Customer Quotes
- Set Vendor Lead Times
- Online Vendor Bidding
- Configurable Workflows

Customer Management

- Sales Opportunities
- Integrated Marketing
- Service and Support
- Customer Self-Service Portal
- Lead and List Management
- Accounts and Contacts
- Email Integration
- See ERP Transactions in CRM

Service Management

- Calendar & Appointments
- Resource Scheduling
- Flexible Billing
- Route Optimization
- Mobile App with GPS
- Equipment Management
- Warranty Management
- Components with Serial Tracking
- Contract Management

Manufacturing

- Bill of Material and Routing
- Production Management
- Material Requirements Planning
- Advanced Planning & Scheduling
- Engineering Change Control
- Manufacturing Estimates
- Product Configurator
- Manufacturing Data Collection

Sales Order Management

- Inventory Allocation
- Invoice Consolidation
- PO Linking
- Real-Time Inventory
- Returns Management
- Multiple or Partial Fulfillment
- Shipment Schedules
- Pick Lists and Replenishment
- Credit Limit Verification
- Custom Workflows
- Special Order Drop Ship
- Will Call Orders

Warehouse Management

- Barcode Label Printing
- Barcode Scanning
- Pick, Pack, and Ship
- Inventory Movement
- Warehouse Transfers
- Physical Inventory
- Device Agnostic
- Inventory Look-Up

Accounting Applications

- General Ledger
- Accounts Receivable
- Accounts Payable
- Multicurrency Management
- Tax Management
- Cash Management
- Deferred Revenue
- Recurring Revenue
- Intercompany Accounting
- Electronic Bank Feeds
- Advanced Expense Management
- Fixed Asset Depreciation
- Payroll and Time Management
- PCI-Compliant Credit Cards

Projects & Construction

- Change Orders and Task Definition
- Cost-Plus or Fixed Cost
- Forecast Project Budget
- Timesheets for Specific Projects
- CRM Portal and Case Integration
- Create Billing Rules
- Manage Project Quotes
- Labor Cost Rates
- Mobile Time and Expense
- Project Templates
- Construction Accounting
- Job Cost Reporting & Analysis
- ProEst, Procore, & CFMA Integration

Purchase Order Management

- Partial Fulfillment
- Consolidated Fulfillment
- Item Tracking
- Automatic Payment Vouchers
- Drop Shipments
- Landed Cost
- Vendor Selection
- Vendor Performance
- Multiple Addresses
- Audit Trail
- Blanket Orders
- Custom Workflows

Commerce and Point of Sale

- Real-time, Bi-directional
- Sync Item Info and Photos
- Sync Orders
- Discounts and Promos
- BigCommerce Storefront
- Shopify Storefront
- Point of Sale Application
- Retail Hardware Integration

Analytics & Platform

- Financial Reports
- Acumatica Report Designer
- Generic Inquiries
- Microsoft Power BI Integration
- Configurable Dashboards
- Multi-Level Security
- Cloud or Premise Deployment
- 99.99% Up-Time
- Native Document Management
- Visual Workflows
- Business Events
- Online Help and Wikis
- Contract Management
- Development Tools
- Integration Utilities

Vendor Marketplace

- Shipping Carrier Integration
- Electronic Data Interchange
- Quality Management
- Light Manufacturing
- Salesforce Integration
- Rental Management
- Supply Chain Execution
- Logistics Management
- Budgeting and Planning
- Container Tracking
- Royalties and Rebates
- Much more!

“Acumatica has exceeded our expectations. From a technology and operations point of view, Acumatica ticks all the boxes: It’s engaging for users, scalable, flexible to meet your needs, and grows with you as a business.”

Chris Drake, Chief Operating Officer, Smartnumbers
Industry: Software and Technology Services



ABOUT ACUMATICA

Acumatica Cloud ERP provides the best business management solution for digitally resilient companies. Built for mobile and telework scenarios and easily integrated with the collaboration tools of your choice, Acumatica delivers flexibility, efficiency, and continuity of operations to growing small and midmarket organizations.

Business Resilience. Delivered.

Version 20230404



ABOUT DSD BUSINESS SYSTEMS

Founded in 1984 in San Diego, DSD Business Systems is an award-winning cloud accounting, ERP, CRM, HR and custom development technology partner with 45 offices throughout North America. As a Gold Acumatica Partner, DSD is recognized annually by Accounting Technology Magazine as a Technology Pacesetter, as well as a Top 100 VAR Firm by both Bob Scott's Insights and Accounting Today.

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