# Acumatica Field Service Edition – Field Service Projects

# 1/15/2021

**Summary**

A field service job that lasts several days becomes a field service project. You can use all the features of the Acumatica Field Service Edition. The set up of service orders and reporting is a bit different but, it enables you to manage a project that consists of many major tasks where each major task has several technicians and of course parts (stock items) and service tasks (non-stock) items.

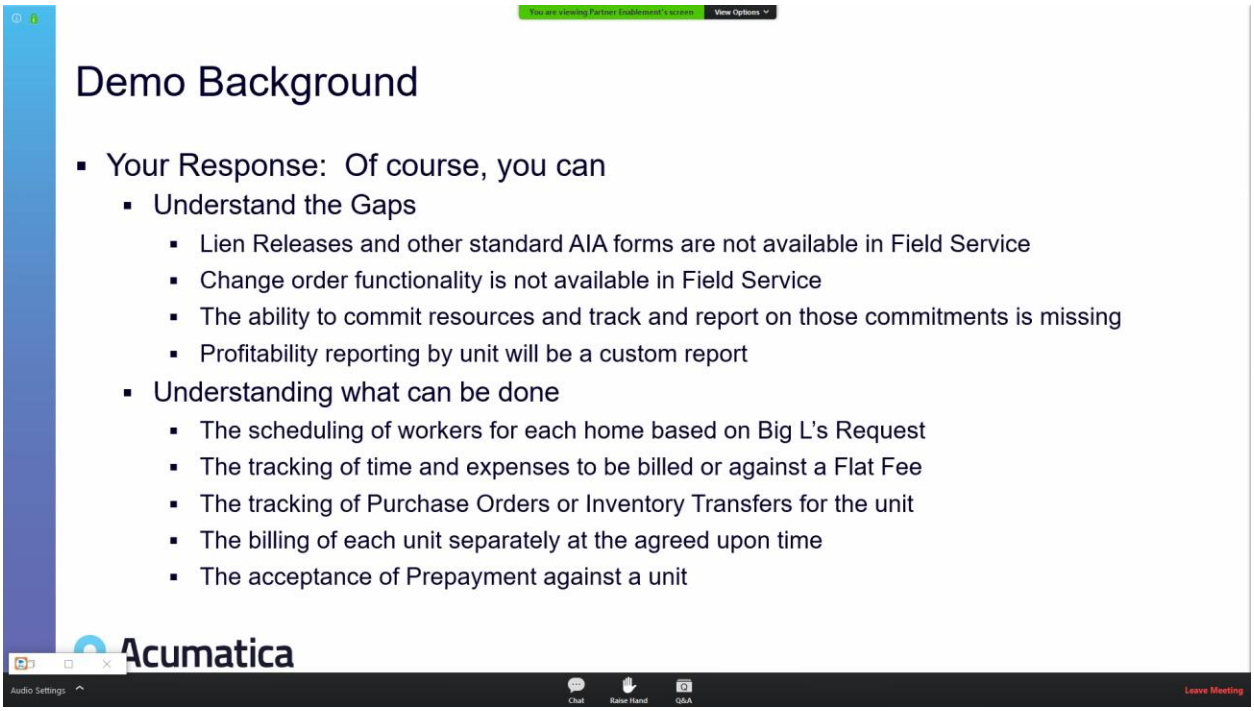
**Details**

The business case in the webinar is as follows:

- Big "L" Builder is building three homes/units. He/she is subcontracting the HVAC work to an HVAC subcontractor who uses three crews (a crew per home)
    - In each home the HVAC subcontractor needs the following:
        - 12 feet AC pipe
        - Install the 12 feet AC duct
        - Air conditioner unit
        - Install the air conditioner

The Acumatica Field Service Edition versus the Acumatica Construction Edition

- There is no need to use the Acumatica Construction Edition since there is:
    - No presence of commitments
    - No liens and AIA forms involved
    - No need to account for retainage of account receivables and payables
- The slide below gives you the differences between the two editions.


You are viewing Partner Enablement's screen
View Options
Demo Background
Your Response: Of course, you can
Understand the Gaps
Lien Releases and other standard AIA forms are not available in Field Service
Change order functionality is not available in Field Service
The ability to commit resources and track and report on those commitments is missing
Profitability reporting by unit will be a custom report
Understanding what can be done
The scheduling of workers for each home based on Big L's Request
The tracking of time and expenses to be billed or against a Flat Fee
The tracking of Purchase Orders or Inventory Transfers for the unit
The billing of each unit separately at the agreed upon time
The acceptance of Prepayment against a unit
Acumatica
Audio Settings
Chat
Raise Hand
Q&A
Leave Meeting

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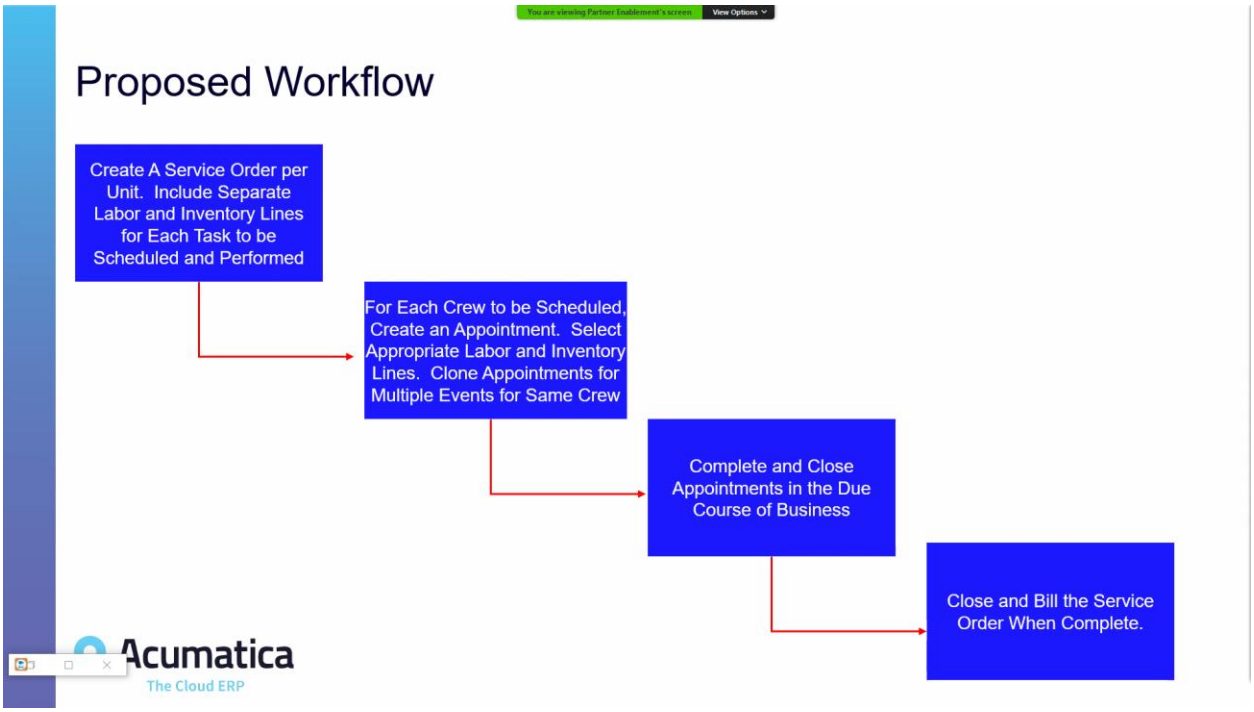
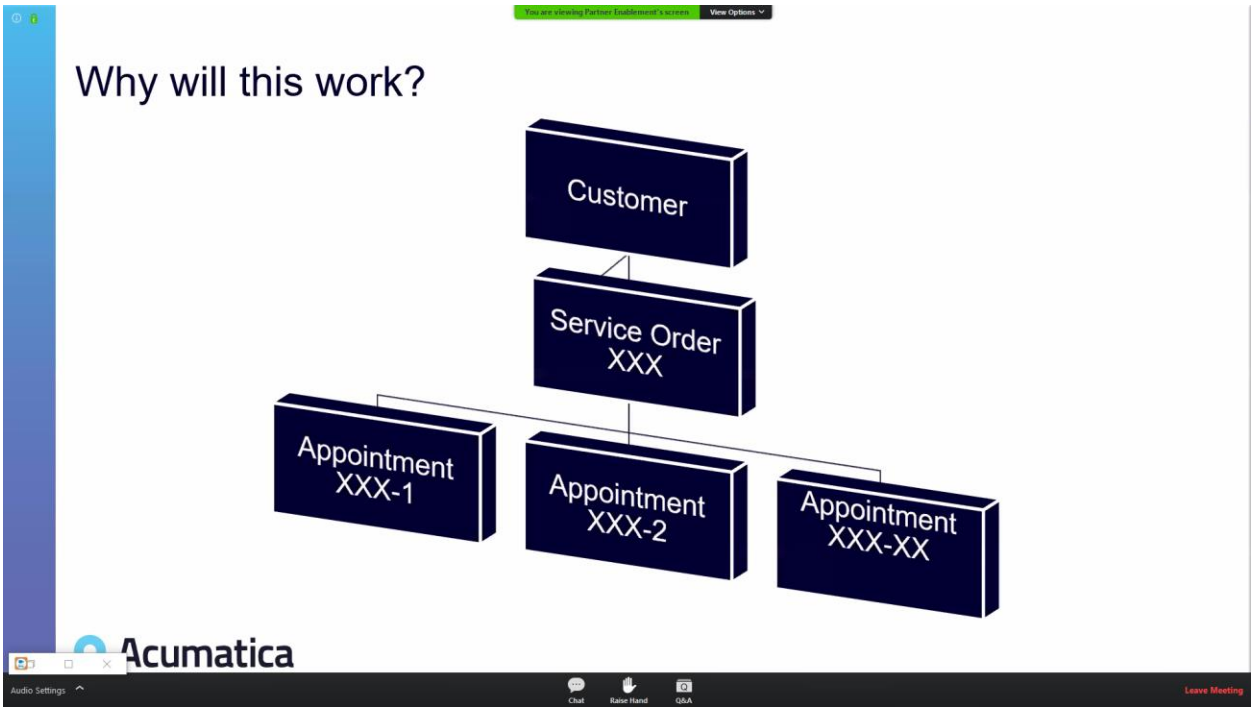
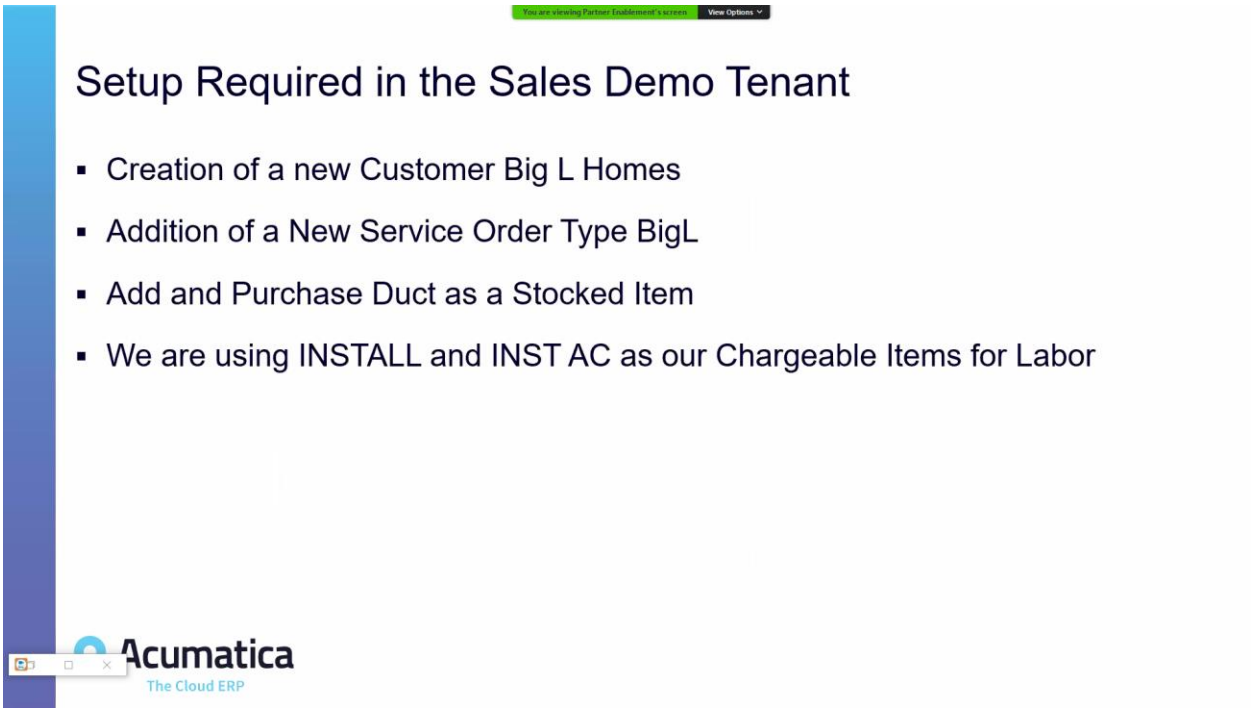
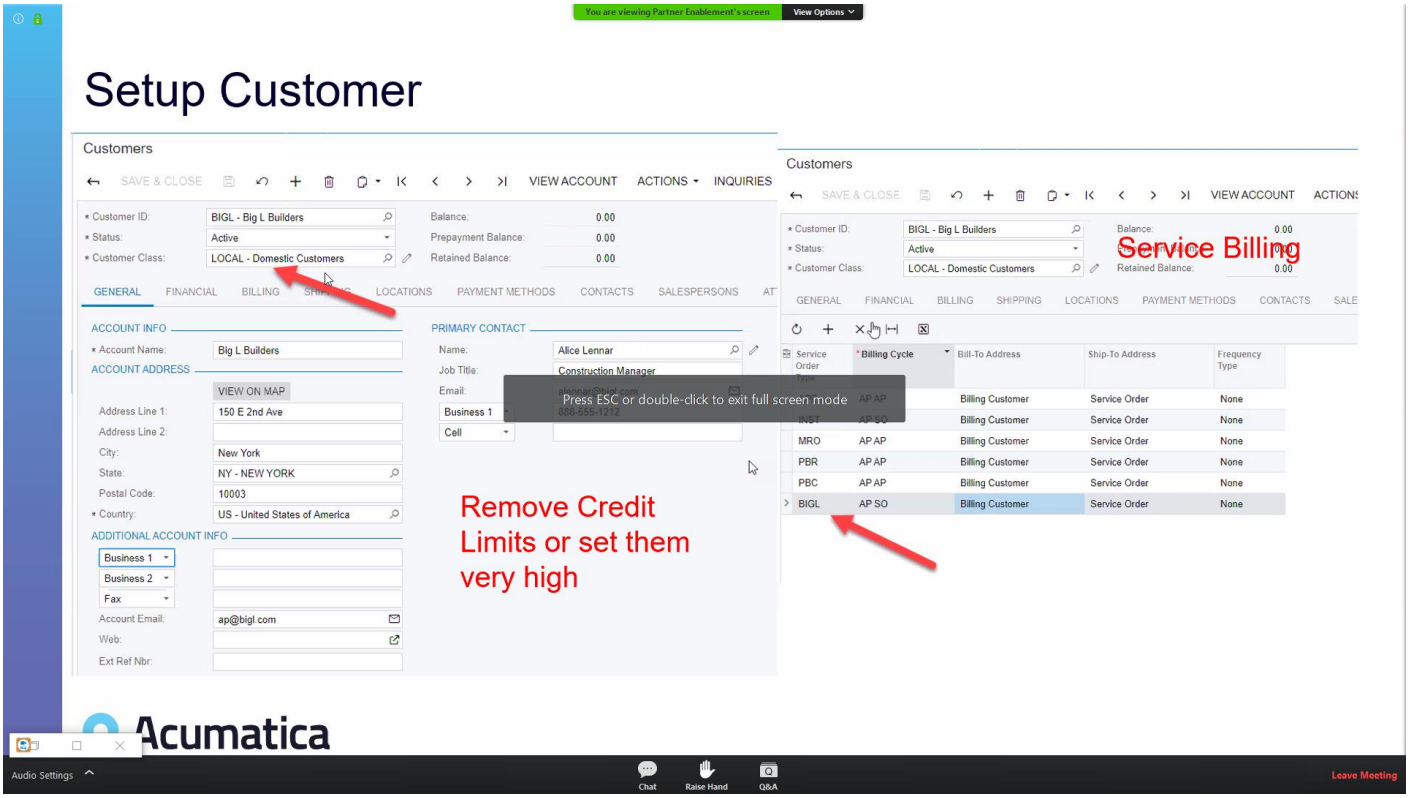

You are viewing Partner Enablement's screen
View Options
Proposed Workflow
Create A Service Order per Unit. Include Separate Labor and Inventory Lines for Each Task to be Scheduled and Performed
For Each Crew to be Scheduled, Create an Appointment. Select Appropriate Labor and Inventory Lines. Clone Appointments for Multiple Events for Same Crew
Complete and Close Appointments in the Due Course of Business
Close and Bill the Service Order When Complete.
Acumatica
The Cloud ERP

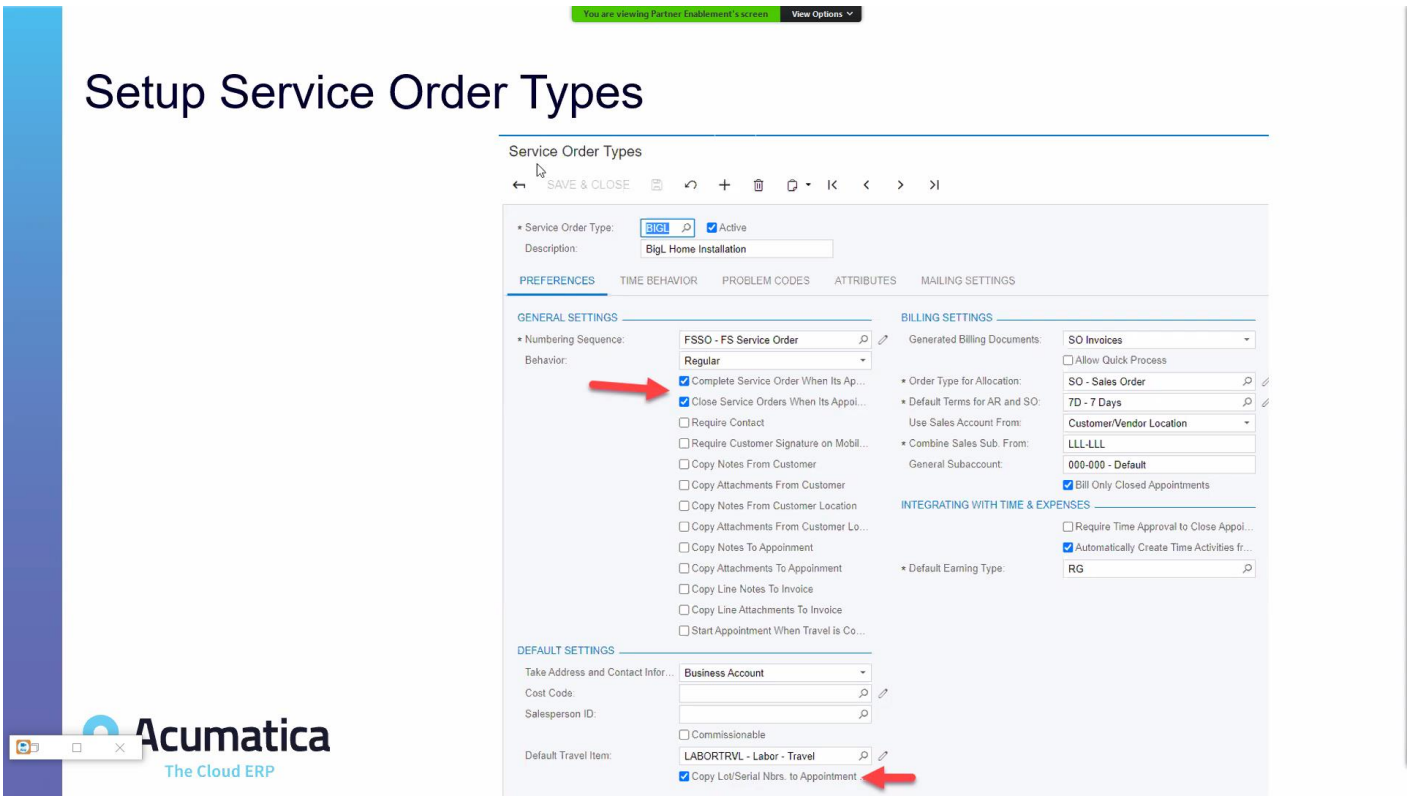


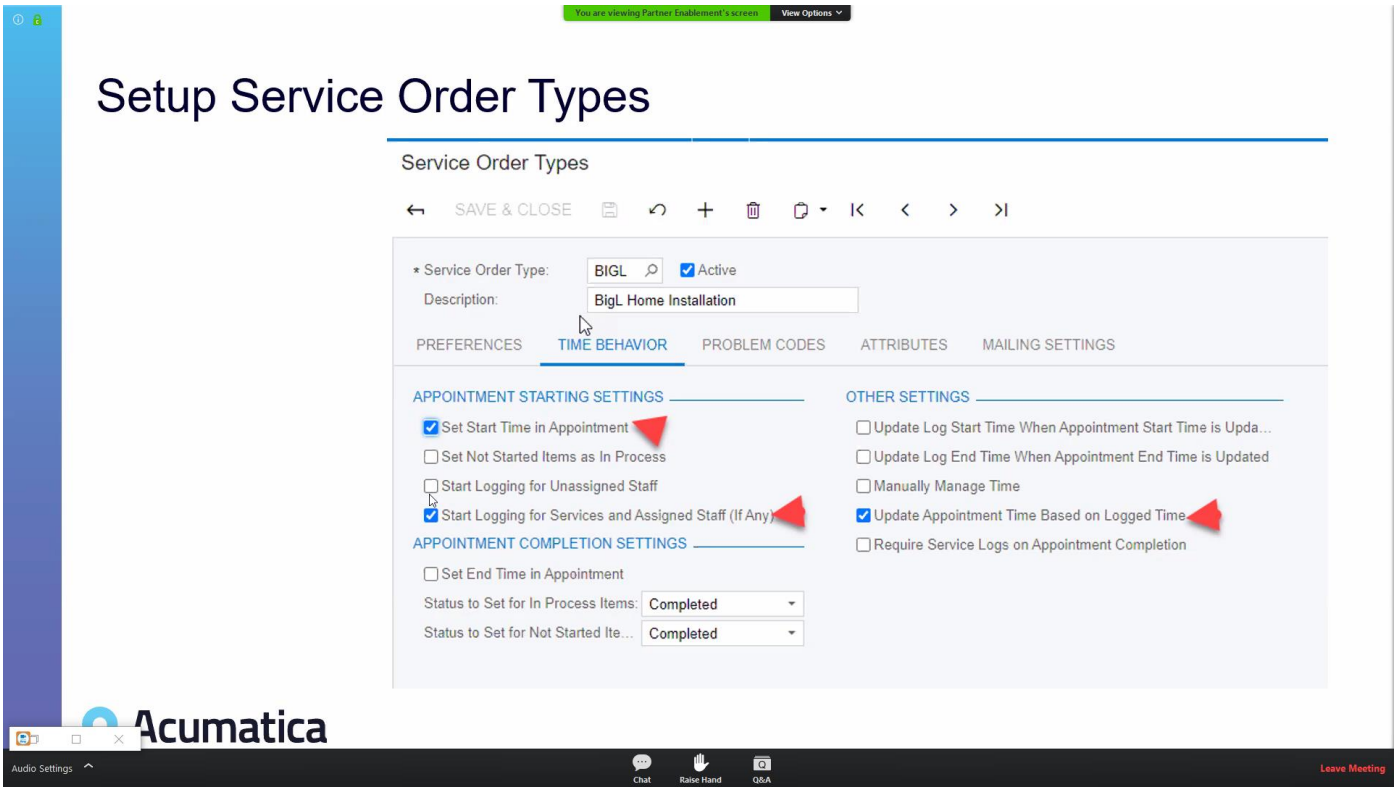



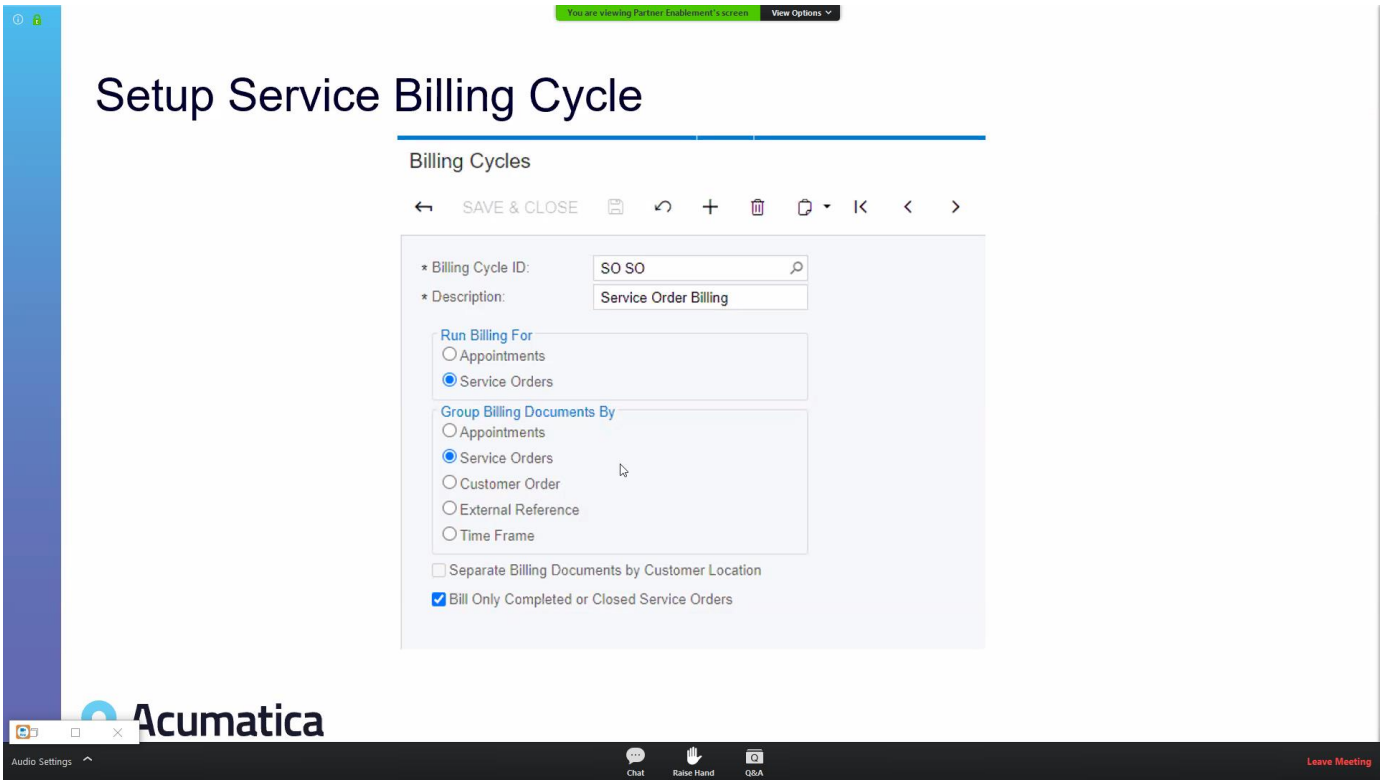

- Need to use at least Acumatica ERP version 2020R2

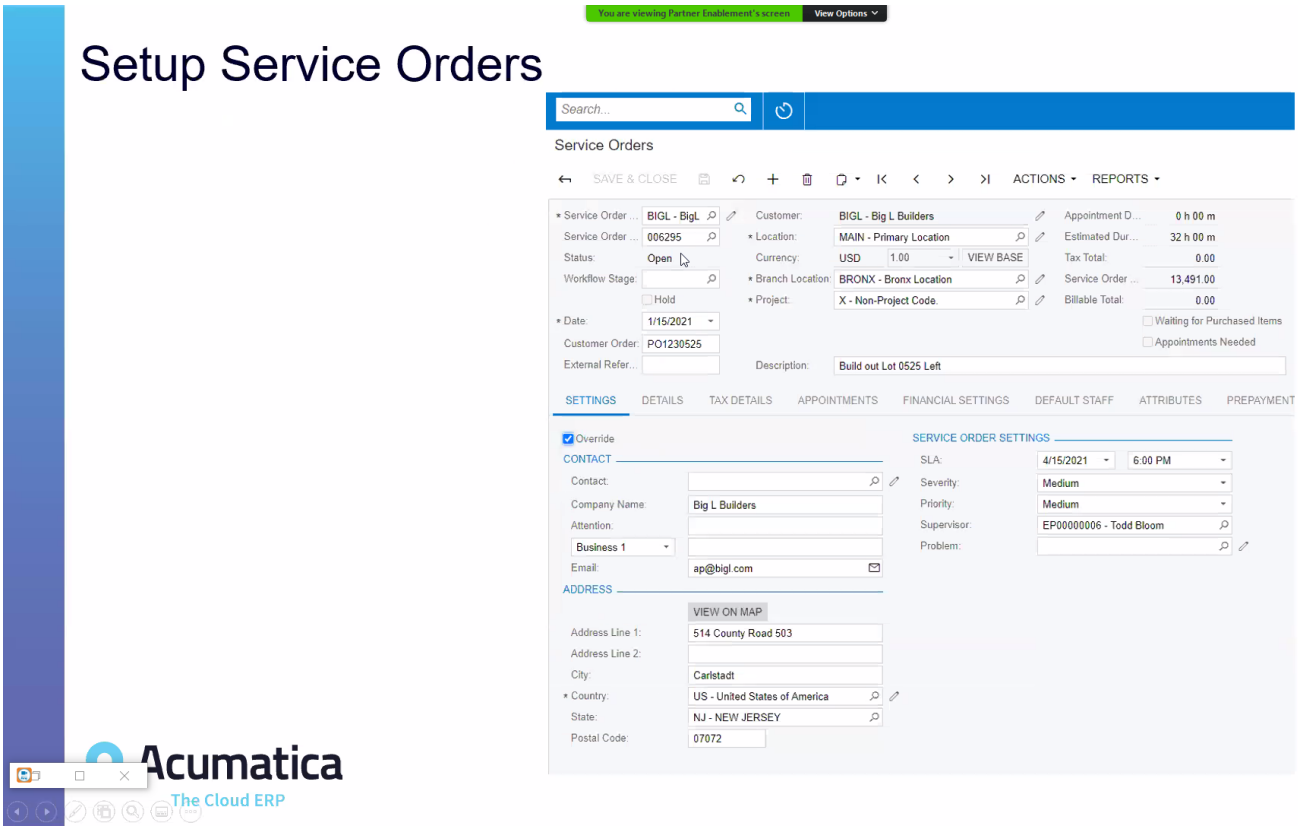



You can add a service order type specific for a customer or a group of customers.

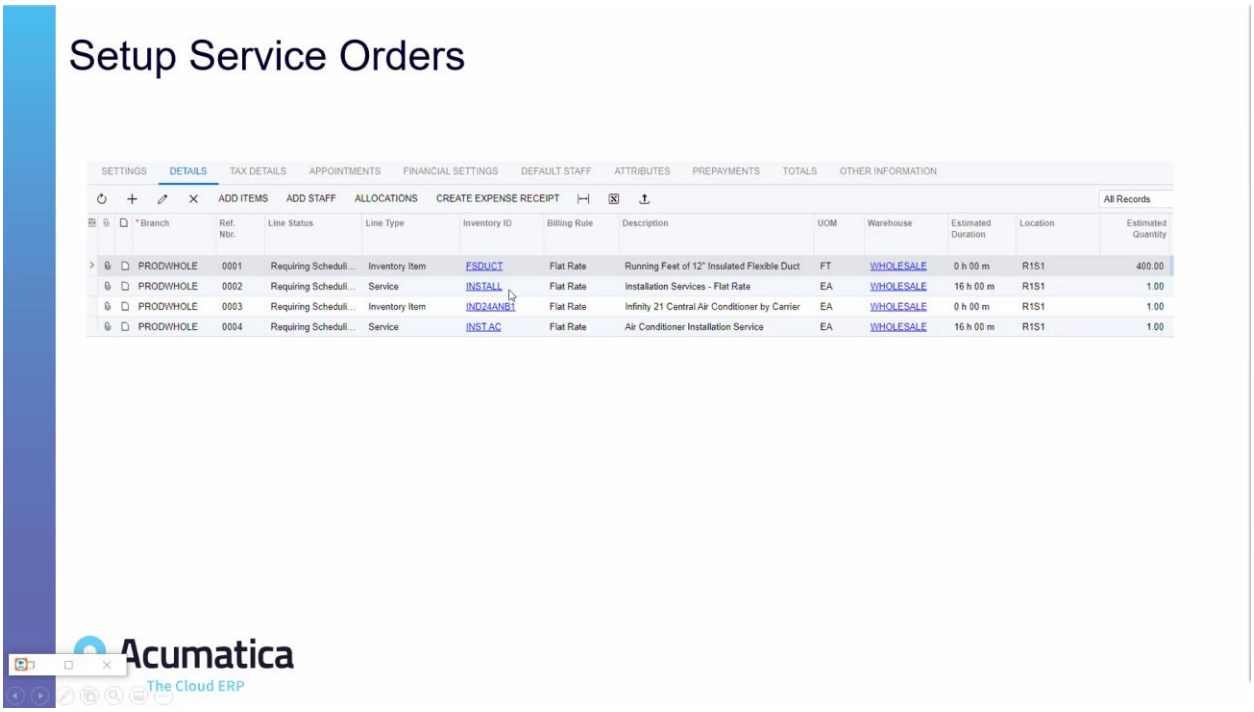


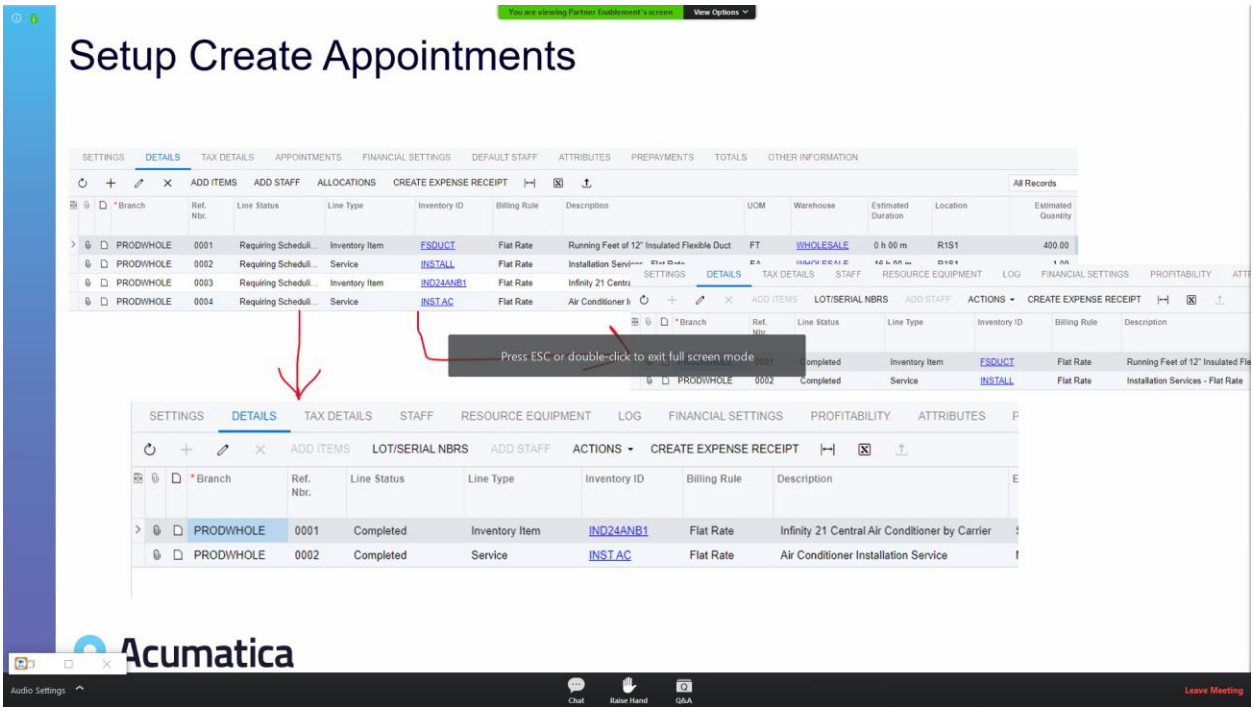

You are viewing Partner Enablement's screen
View Options
Setup Service Order Types
Service Order Types
SAVE & CLOSE
* Service Order Type: BIGL
Active
Description: BigL Home Installation
PREFERENCES
TIME BEHAVIOR
PROBLEM CODES
ATTRIBUTES
MAILING SETTINGS
APPOINTMENT STARTING SETTINGS
Set Start Time in Appointment
Set Not Started Items as In Process
Start Logging for Unassigned Staff
Start Logging for Services and Assigned Staff (If Any)
APPOINTMENT COMPLETION SETTINGS
Set End Time in Appointment
Status to Set for In Process Items: Completed
Status to Set for Not Started Ite... Completed
OTHER SETTINGS
Update Log Start Time When Appointment Start Time is Upda...
Update Log End Time When Appointment End Time is Updated
Manually Manage Time
Update Appointment Time Based on Logged Time
Require Service Logs on Appointment Completion
Acumatica
Audio Settings
Chat
Raise Hand
Q&A
Leave Meeting


You are viewing Partner Enablement's screen
View Options
Setup Service Billing Cycle
Billing Cycles
SAVE & CLOSE
* Billing Cycle ID: SO SO
* Description: Service Order Billing
Run Billing For
Appointments
Service Orders
Group Billing Documents By
Appointments
Service Orders
Customer Order
External Reference
Time Frame
Separate Billing Documents by Customer Location
Bill Only Completed or Closed Service Orders
Acumatica
Audio Settings
Chat
Raise Hand
Q&A
Leave Meeting

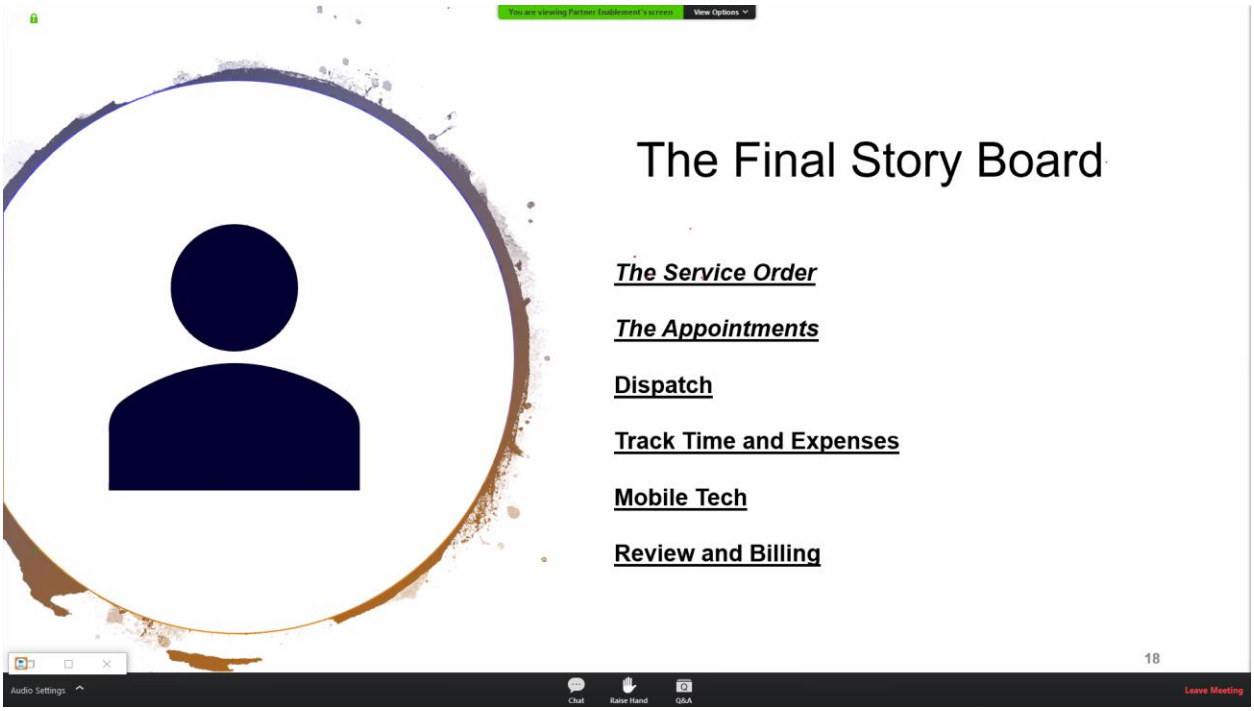


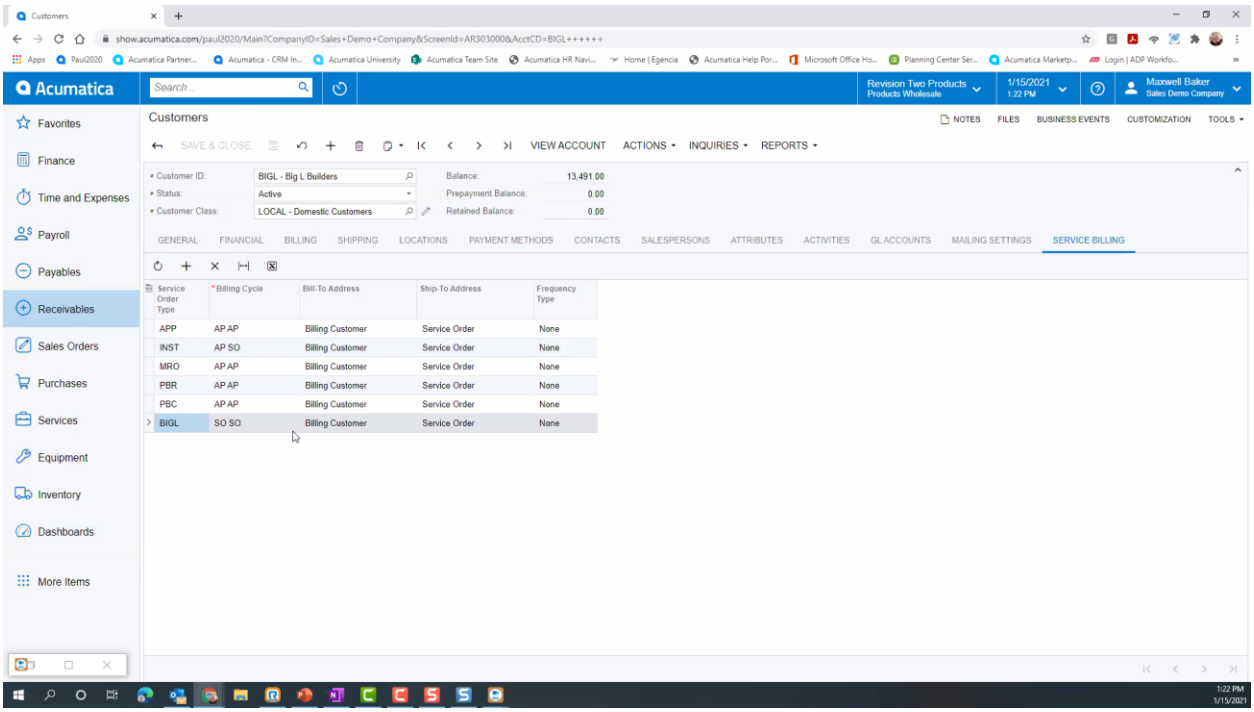

A service order for one home/unit consists of 12’ feed duct, install duct, AC unit and install AC unit.

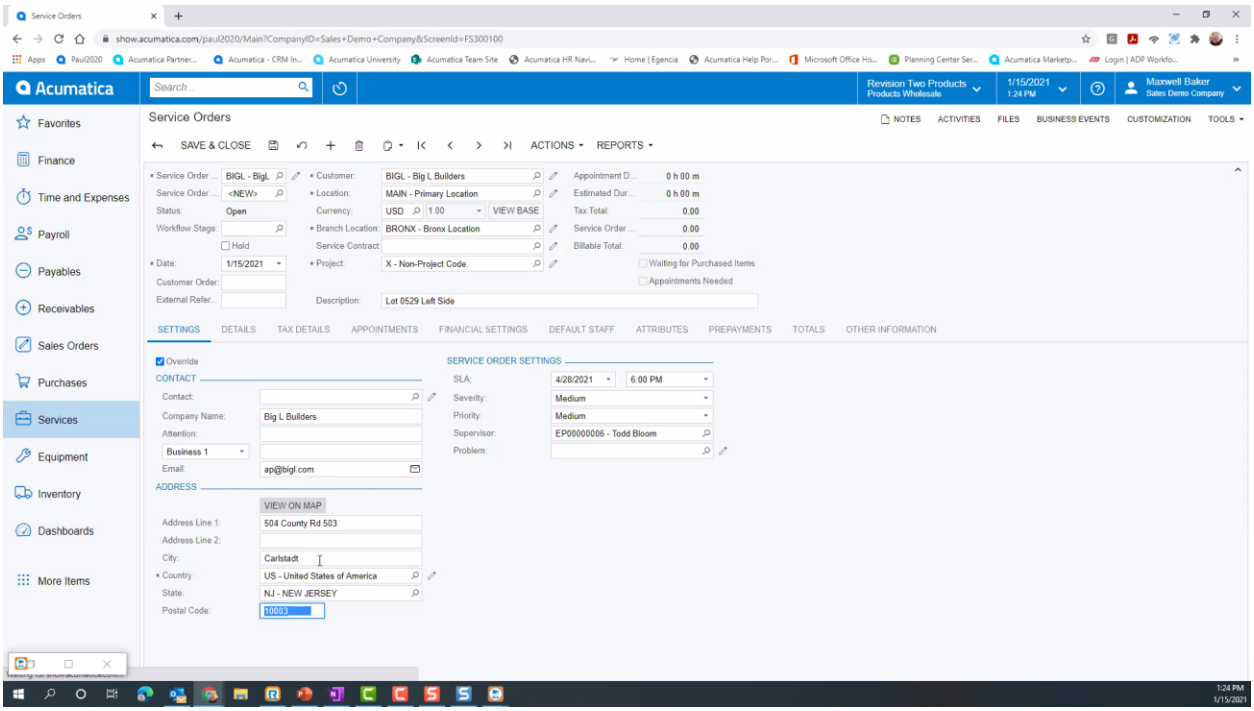


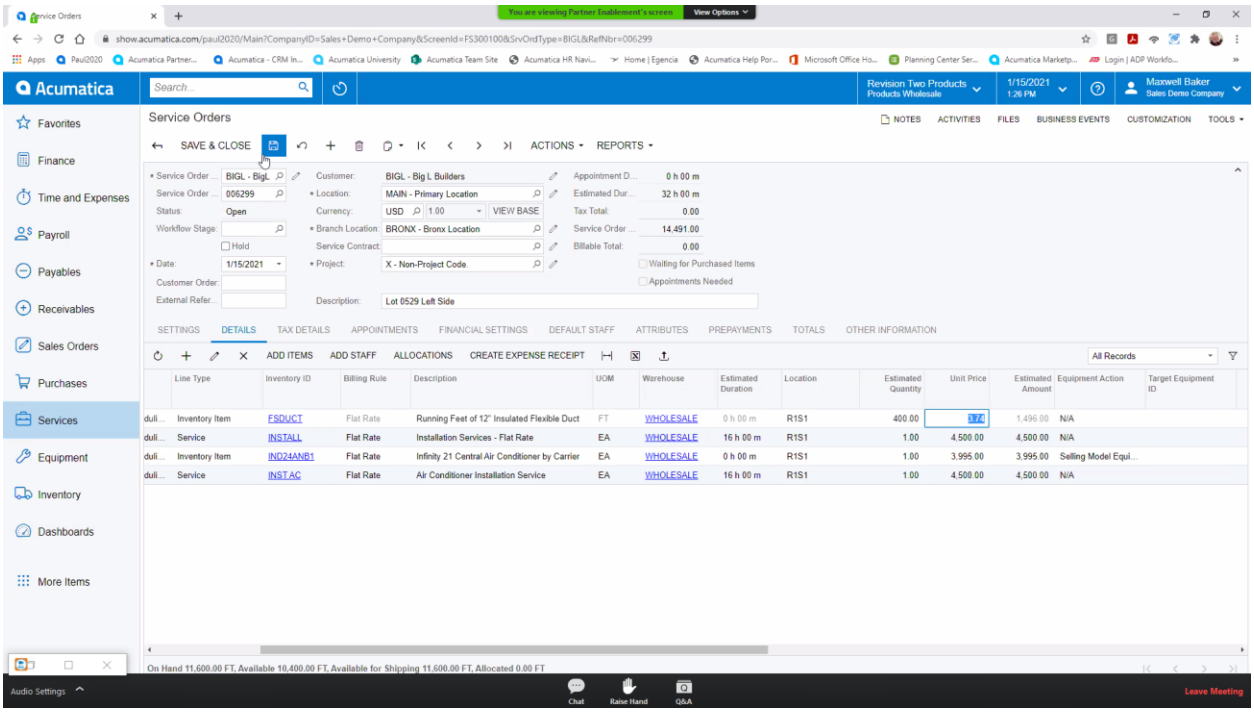


Screen captures of the actual demo are given below.

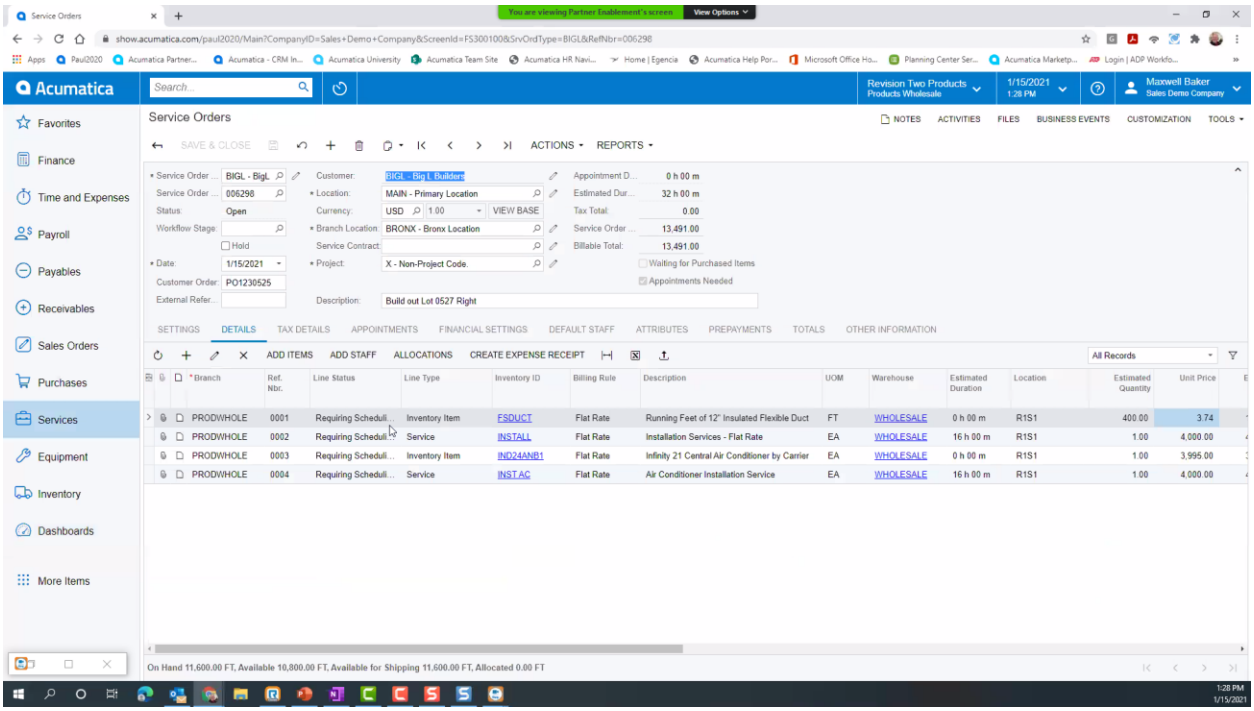

You are viewing Partner Enablement's screen
View Options
The Final Story Board
The Service Order
The Appointments
Dispatch
Track Time and Expenses
Mobile Tech
Review and Billing
18
Audio Settings
Chat
Raise Hand
Q&A
Leave Meeting

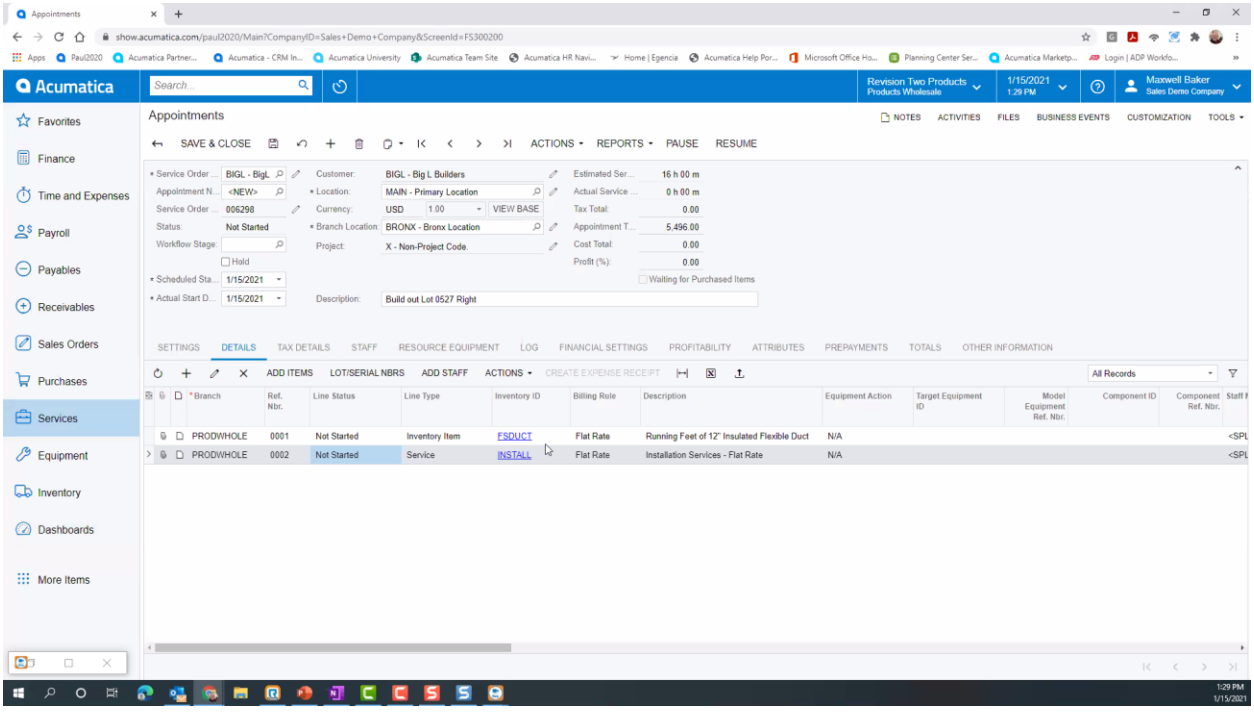

Acumatica
Search...
Revision Two Products
Products Wholesale
1/15/2021
1:22 PM
Maxwell Baker
Sales Demo Company
Favorites
Finance
Time and Expenses
Payroll
Payables
Receivables
Sales Orders
Purchases
Services
Equipment
Inventory
Dashboards
More Items
Customers
NOTES
FILES
BUSINESS EVENTS
CUSTOMIZATION
TOOLS
SAVE & CLOSE
VIEW ACCOUNT
ACTIONS
INQUIRIES
REPORTS
Customer ID: BIGL - Big L Builders
Status: Active
Customer Class: LOCAL - Domestic Customers
Balance: 13,491.00
Prepayment Balance: 0.00
Retained Balance: 0.00
GENERAL
FINANCIAL
BILLING
SHIPPING
LOCATIONS
PAYMENT METHODS
CONTACTS
SALESPERSONS
ATTRIBUTES
ACTIVITIES
GL ACCOUNTS
MAILING SETTINGS
SERVICE BILLING
Service Order Type
Billing Cycle
Bill-To Address
Ship-To Address
Frequency Type
APP AP AP Billing Customer Service Order None
INST AP SO Billing Customer Service Order None
MRO AP AP Billing Customer Service Order None
PBR AP AP Billing Customer Service Order None
PBC AP AP Billing Customer Service Order None
BIGL SO SO Billing Customer Service Order None




You can see the inventory level for a selected item at the bottom of the above Service Order screen as of the Service Order date.


Acumatica
Service Orders
Favorites
Finance
Time and Expenses
Payroll
Payables
Receivables
Sales Orders
Purchases
Services
Equipment
Inventory
Dashboards
More Items
SAVE & CLOSE
ACTIONS
REPORTS
ADD ITEMS
ADD STAFF
ALLOCATIONS
CREATE EXPENSE RECEIPT
Build out Lot 0527 Right

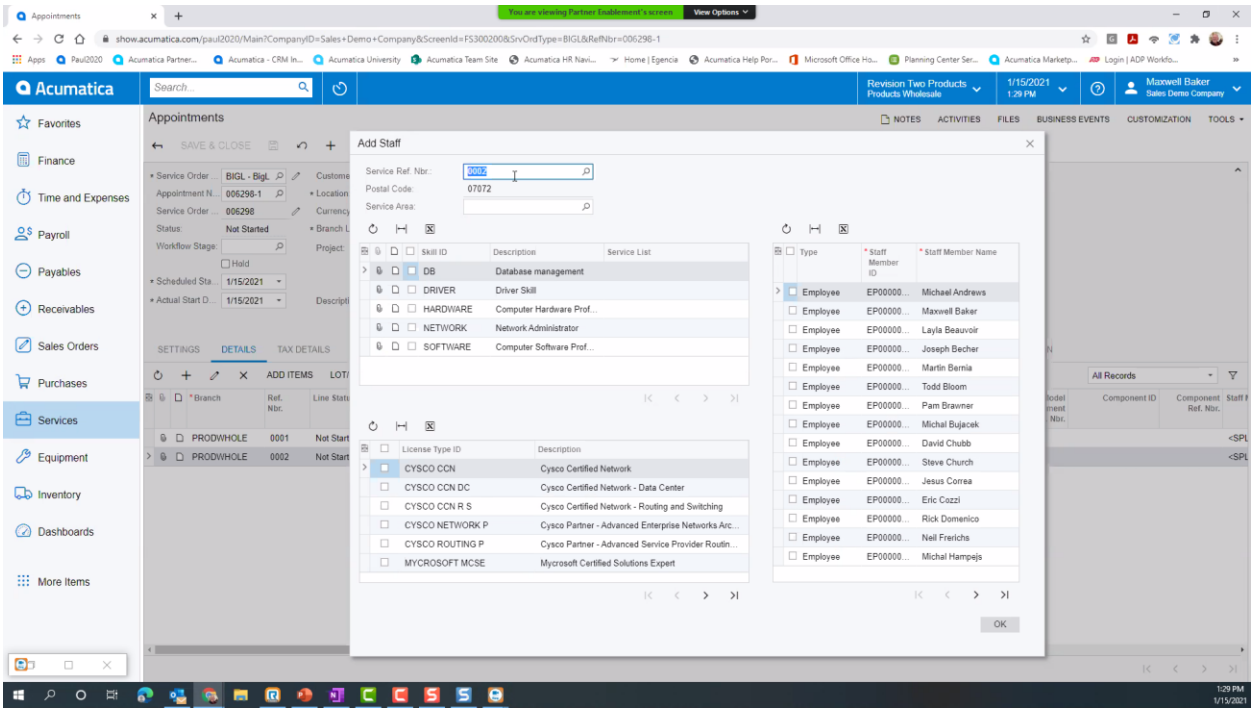

Acumatica
Appointments
Favorites
Finance
Time and Expenses
Payroll
Payables
Receivables
Sales Orders
Purchases
Services
Equipment
Inventory
Dashboards
More Items
SAVE & CLOSE
ACTIONS
REPORTS
PAUSE
RESUME
ADD ITEMS
ADD STAFF
Build out Lot 0527 Right

For each line item (part, service), you can make an appointment which consists of adding/assigning an employee based on the required skill and license to that line item. Selecting a skill and a license will narrow down the eligible employees.

Of course you can assign the same employee to many line items in details.

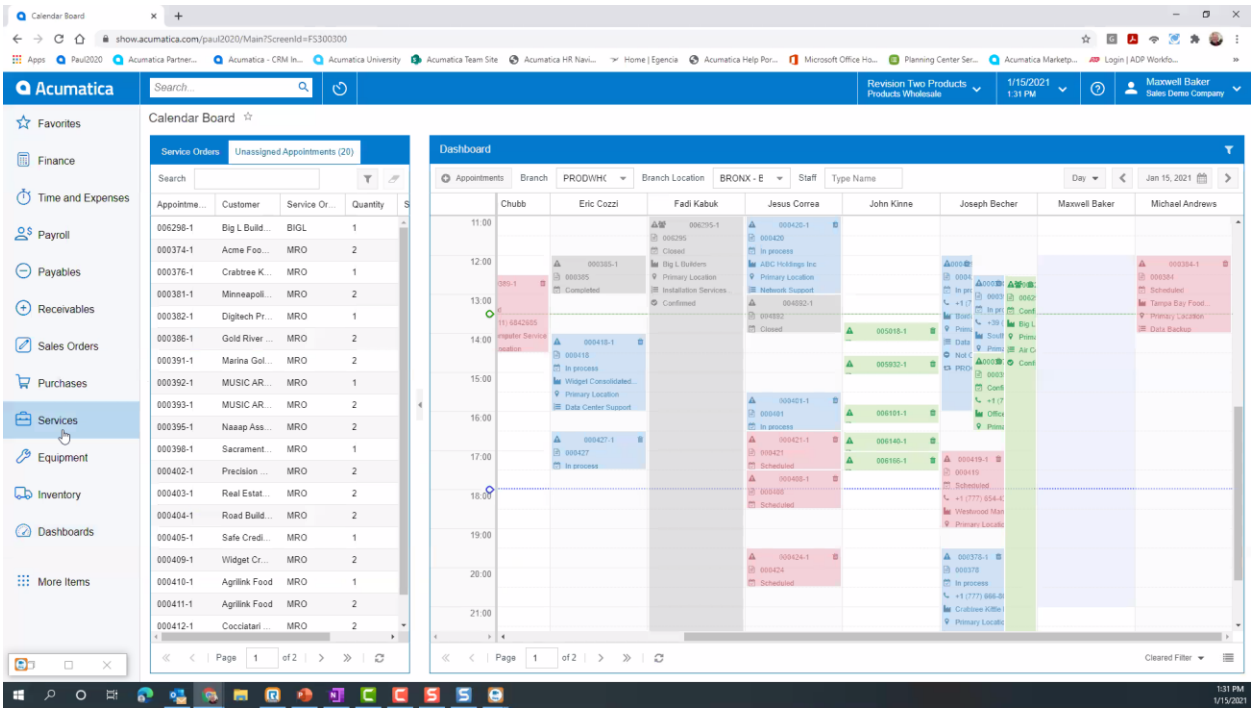
Vice versa you can assign many employees (a crew) to the same line item or to several line items.

You can assign many line items to the same appointment.

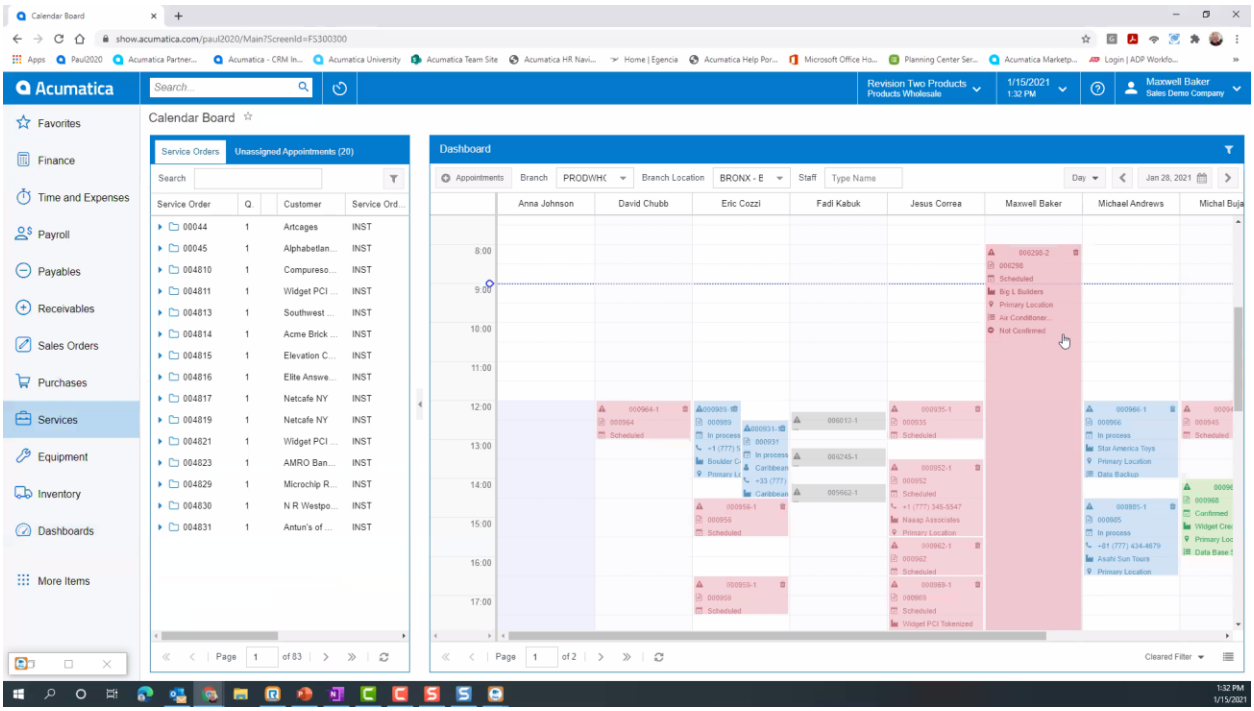


You still have to assign a date and time to each employee or crew to perform the service line item.

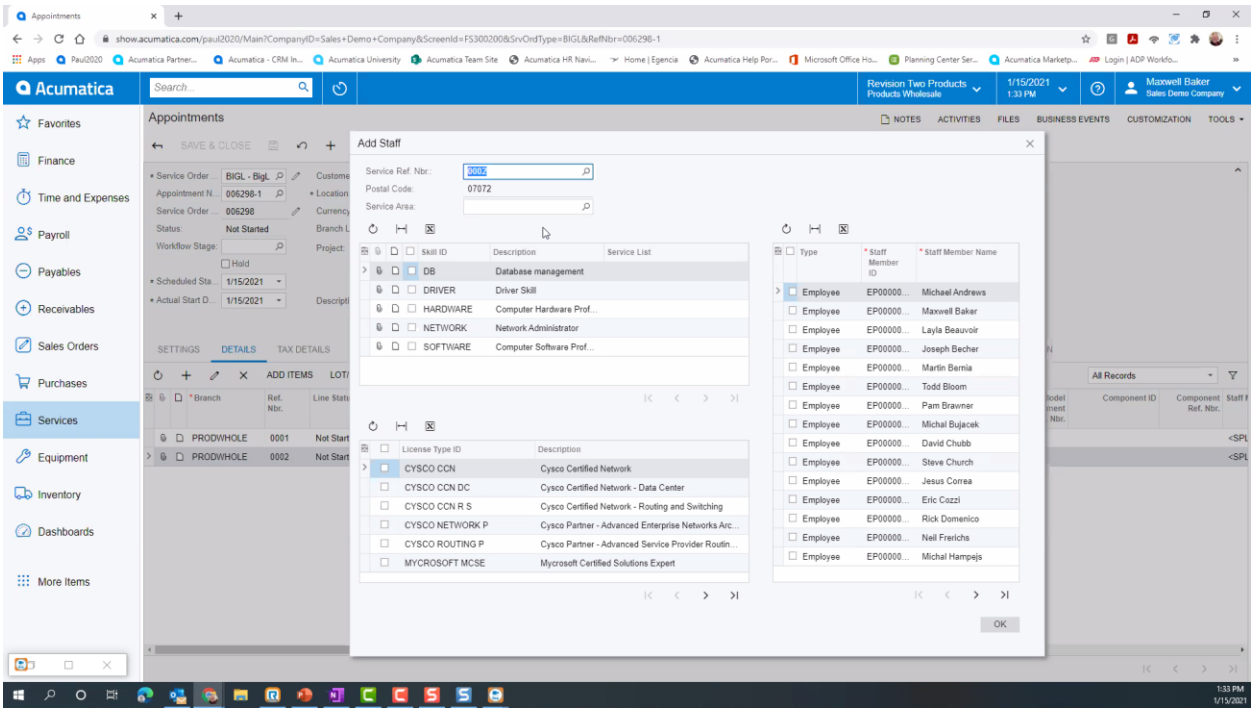
The calendar board enables the dispatcher to do this. Or you can use the appointment form as seen on page 13.

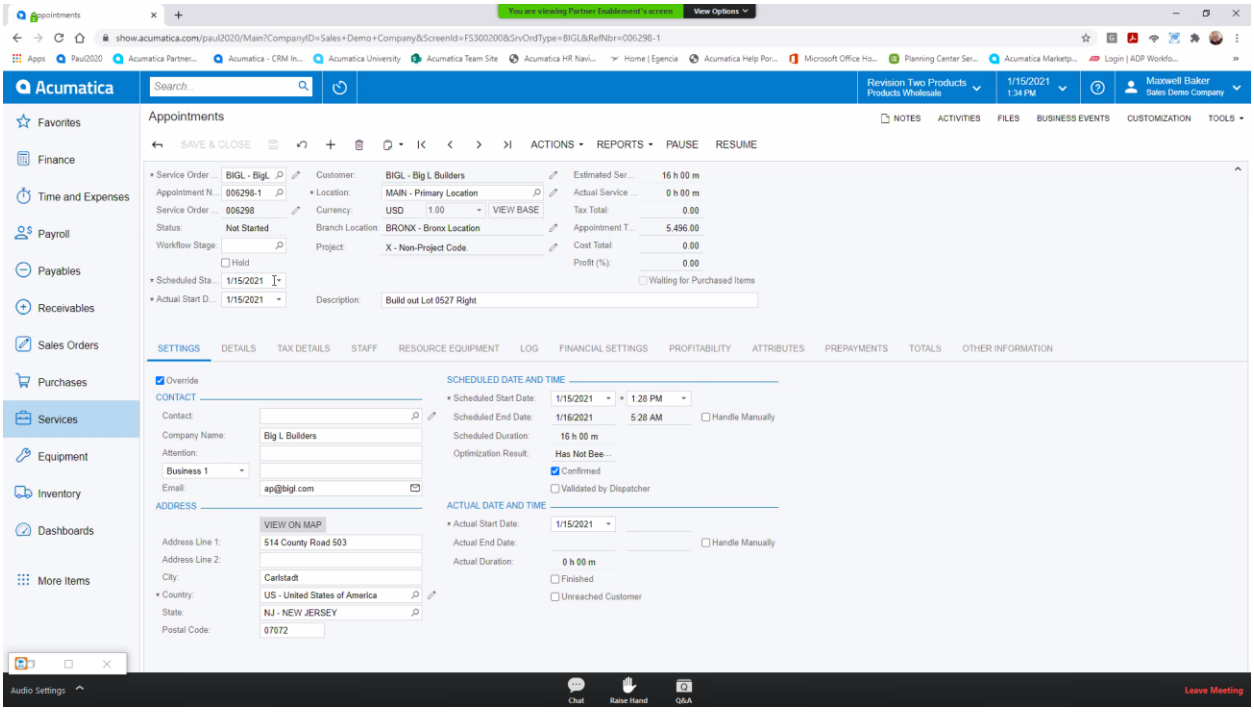



Add staff

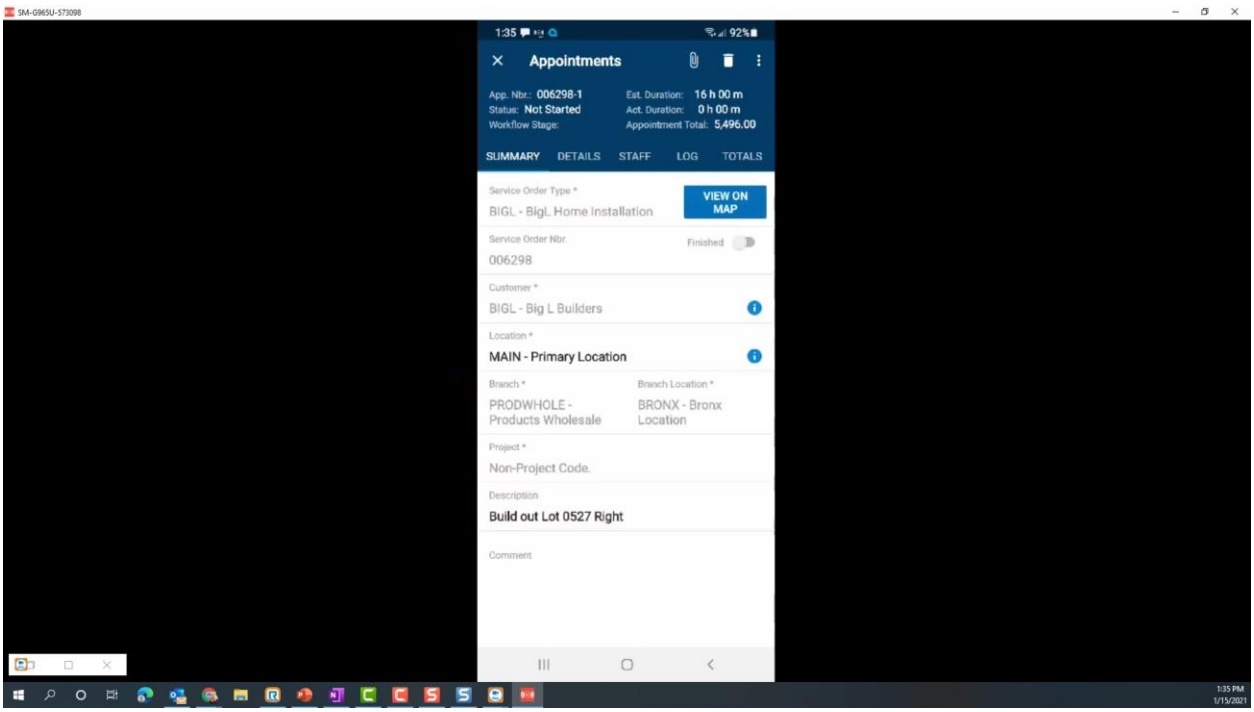



Alternatively, you can make an appointment using the appointment form.

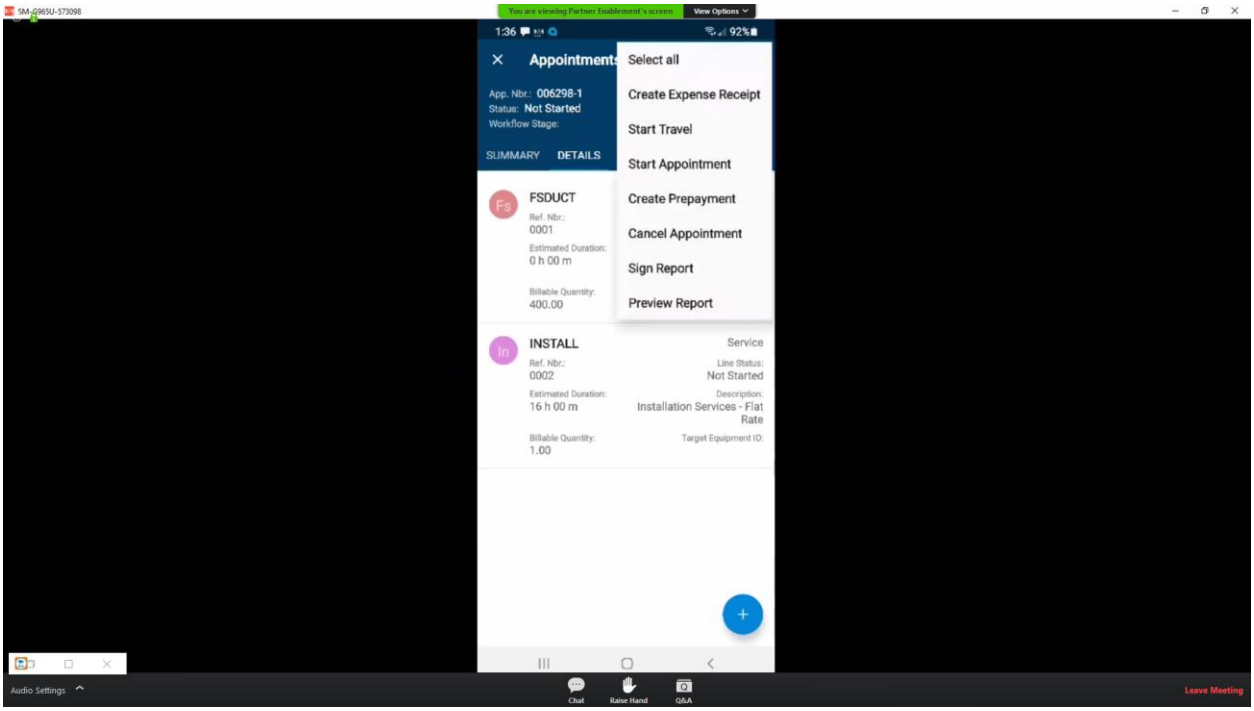


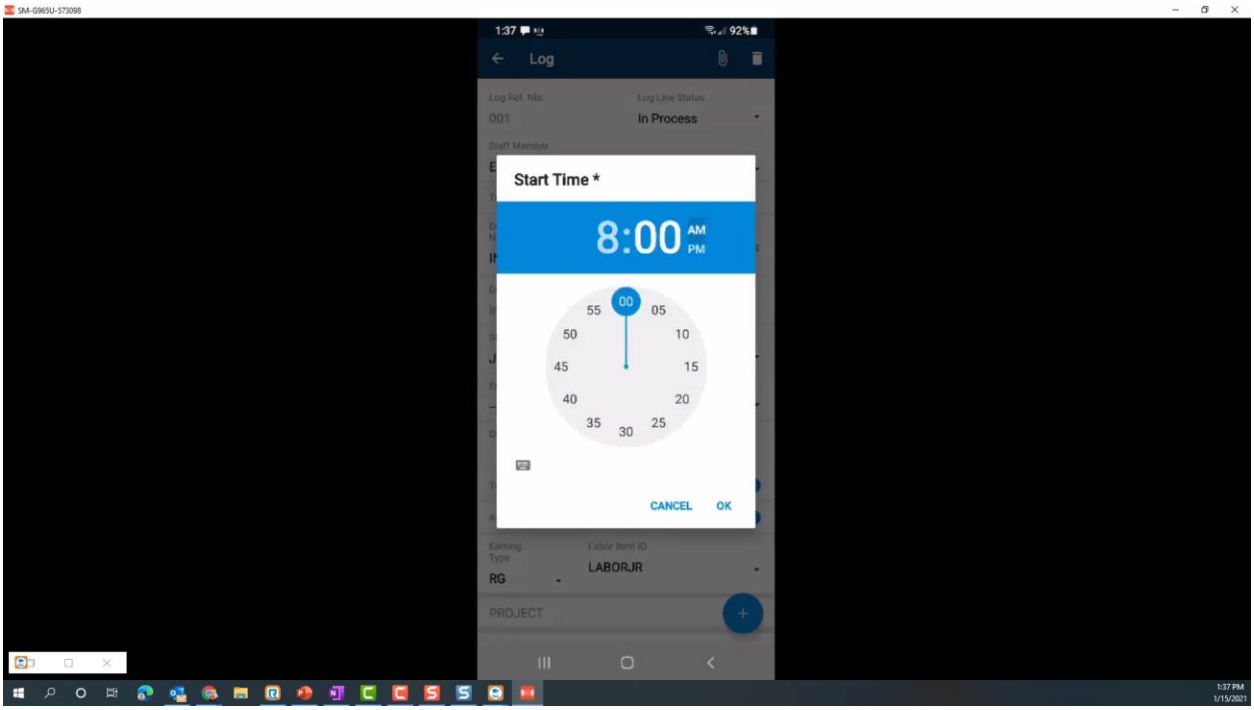



The technician employee or crew can check their appointments in the Acumatica mobile app. The technician signs into his/her mobile app  and can view their appointments for a particular day. For an appointment, the can check the address of a customer on a map in the mobile app.

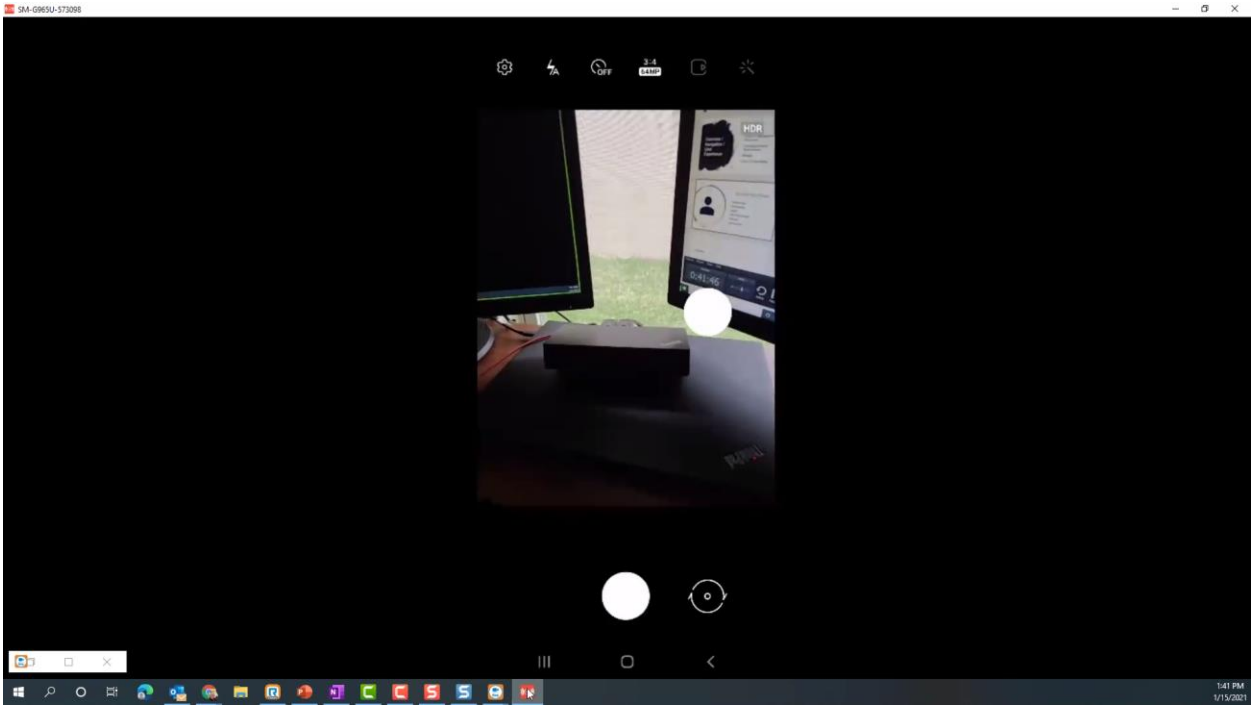


In this case two line items (the 12’ feet duct, and the installation of the duct) show up in his appointment. The technician can click on start travel when he leaves for the job/appointment.

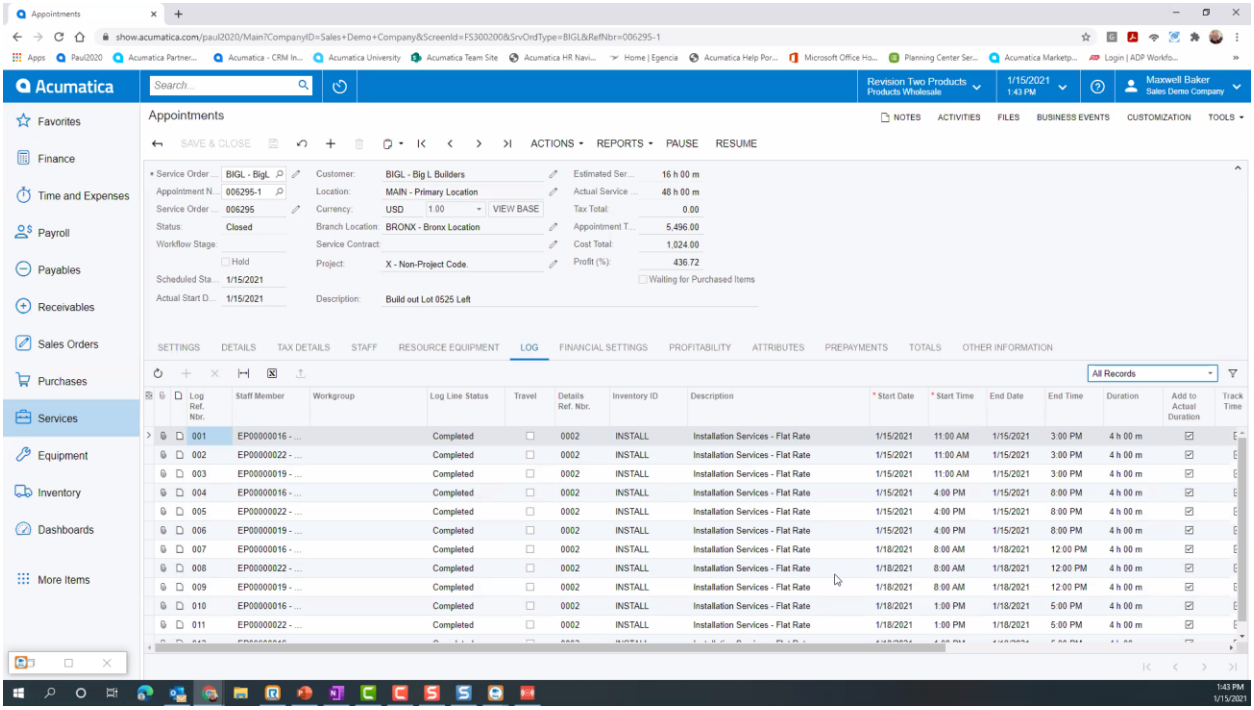
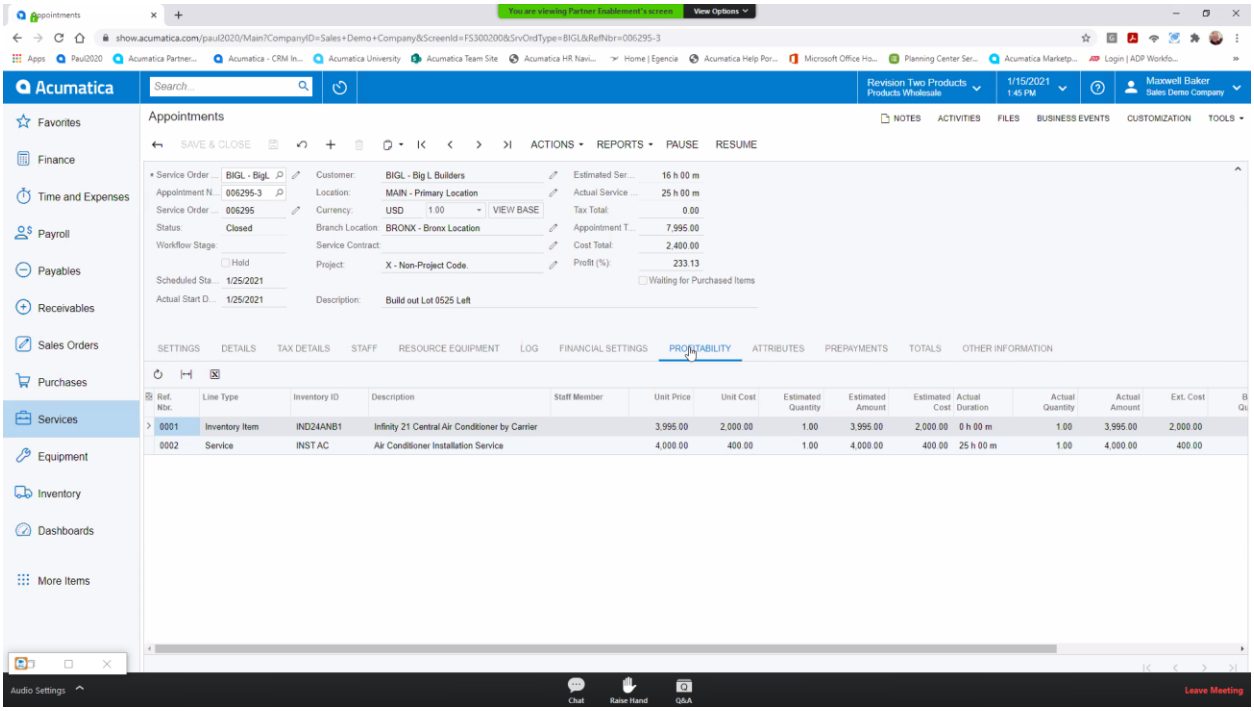
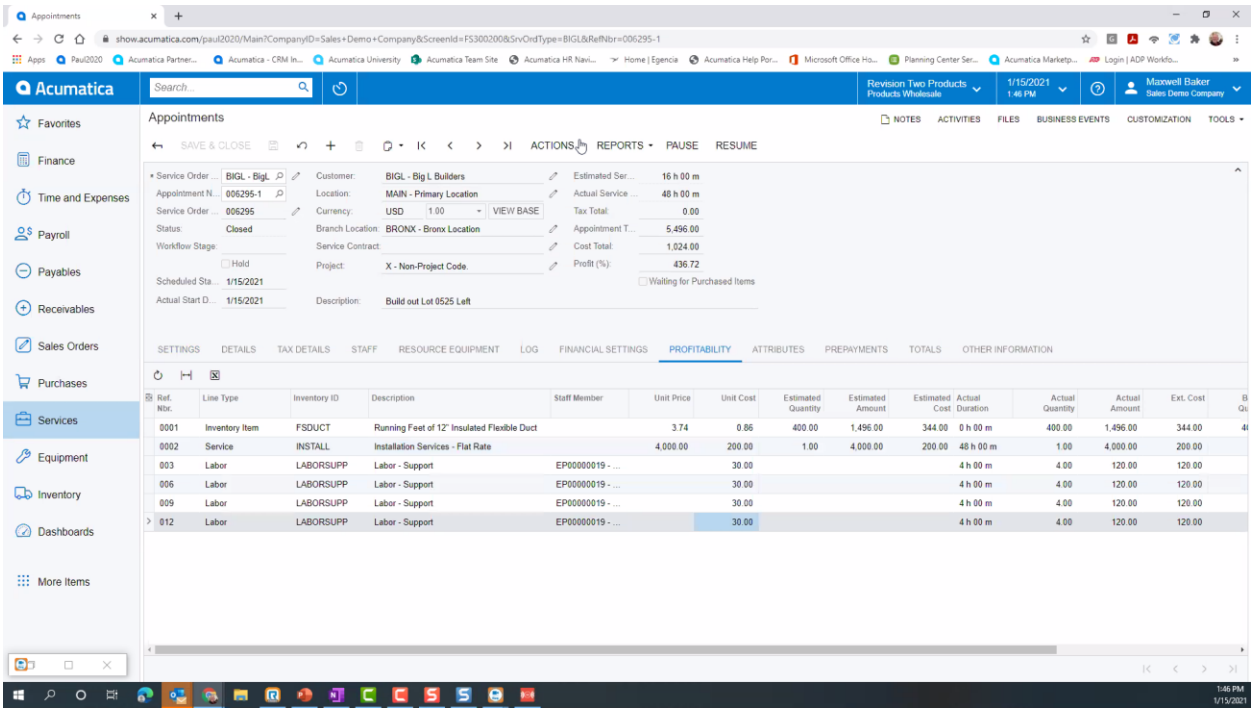


The technician can take a picture of the customer site.



In the meantime, the customer service rep can check in the office the progress of a particular appointment under the log section of a that appointment.



Since each appointment/job has a cost (hourly wage, driving expense, tool expense,..) and a charge to the customer (revenue), the profit/loss can be determined for that appointment. Remember this appointment has two line items: 12' AC duct, and the installation of the duct.