

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

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Audio Settings Chat Raise Hand Q&A Leave Meeting

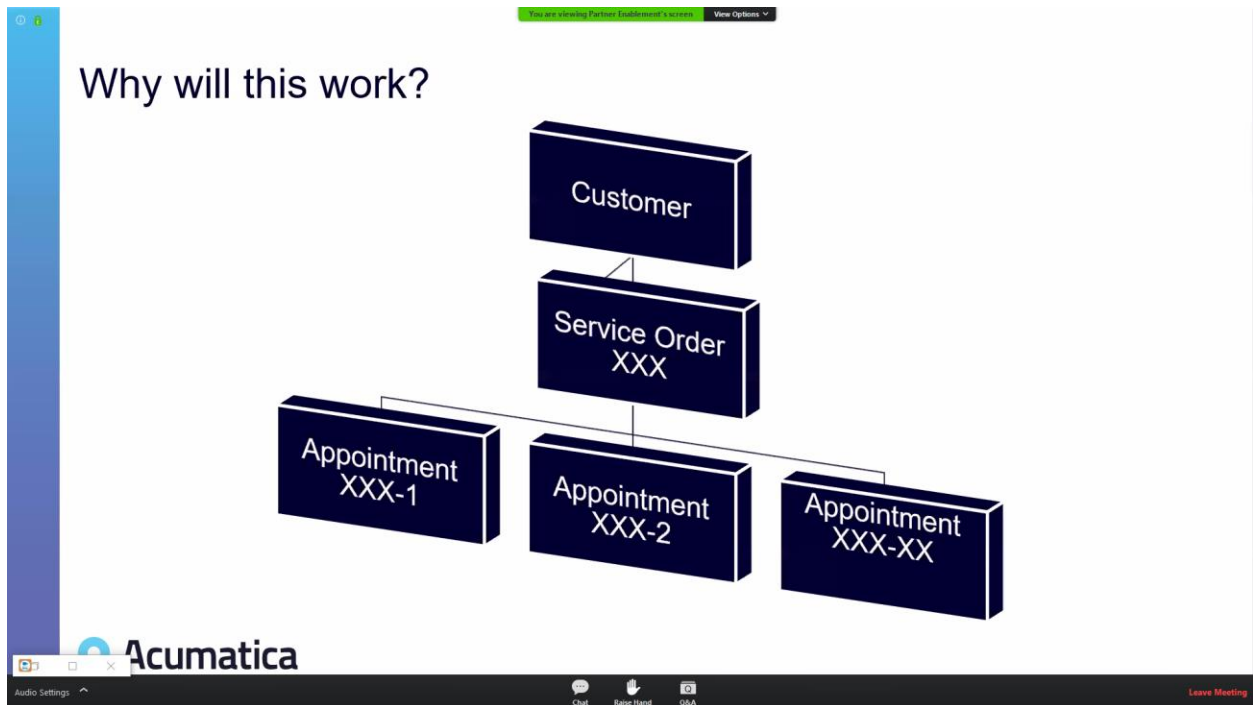
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You are viewing Partner Enablement's screen. View Options

Proposed Workflow

```
graph TD; A[Create A Service Order per Unit. Include Separate Labor and Inventory Lines for Each Task to be Scheduled and Performed] --> B[For Each Crew to be Scheduled, Create an Appointment. Select Appropriate Labor and Inventory Lines. Clone Appointments for Multiple Events for Same Crew]; B --> C[Complete and Close Appointments in the Due Course of Business]; C --> D[Close and Bill the Service Order When Complete.];
```

Acumatica
The Cloud ERP



- ### Setup Required in the Sales Demo Tenant
- Creation of a new Customer Big L Homes
 - Addition of a New Service Order Type BigL
 - Add and Purchase Duct as a Stocked Item
 - We are using INSTALL and INST AC as our Chargeable Items for Labor
- The Acumatica logo is visible at the bottom left of the slide.

- Need to use at least Acumatica ERP version 2020R2

Setup Customer

Remove Credit Limits or set them very high

Service Billing

Service Order	Billing Cycle	Bill-To Address	Ship-To Address	Frequency Type
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	AP SO	Billing Customer	Service Order	None

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

Setup Service Order Types

Service Order Types

Service Order Type: **BIGL** Active
 Description: **BigL Home Installation**

GENERAL SETTINGS

Numbering Sequence: **FSSO - FS Service Order**
 Behavior: **Regular**

- Complete Service Order When Its Ap...
- Close Service Orders When Its Ap...
- Require Contact
- Require Customer Signature on Mobil...
- Copy Notes From Customer
- Copy Attachments From Customer
- Copy Notes From Customer Location
- Copy Attachments From Customer Lo...
- Copy Notes To Appointment
- Copy Attachments To Appointment
- Copy Line Notes To Invoice
- Copy Line Attachments To Invoice
- Start Appointment When Travel is Co...

BILLING SETTINGS

Generated Billing Documents: **SO Invoices**

- Allow Quick Process
- SO - Sales Order**
- 7D - 7 Days**
- Use Sales Account From: **Customer/Vendor Location**
- Combine Sales Sub. From: **LLL-LLL**
- General Subaccount: **000-000 - Default**
- Bill Only Closed Appointments

INTEGRATING WITH TIME & EXPENSES

- Require Time Approval to Close Apoi...
- Automatically Create Time Activities fr...
- Default Earning Type: **RG**

DEFAULT SETTINGS

Take Address and Contact Infor...: **Business Account**
 Cost Code:
 Salesperson ID:
 Commissionable:
 Default Travel Item: **LABORTRVL - Labor - Travel**
 Copy Lot/Serial Nbrs. to Appointment

You are viewing Partner Enablement's screen View Options

Setup Service Order Types

Service Order Types

← SAVE & CLOSE [Icons]

* Service Order Type: Active
Description:

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:
- Status to Set for Not Started It...:

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

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You are viewing Partner Enablement's screen View Options

Setup Service Billing Cycle

Billing Cycles

← SAVE & CLOSE [Icons]

* Billing Cycle ID:
* Description:

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

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Setup Service Orders

You are viewing Partner Establishment screen. [View Options](#)

Search...
🔍

Service Orders

← SAVE & CLOSE 🗑️ ↶ + 🗑️ 📄 ⏪ < > ⏩ ACTIONS REPORTS

* Service Order ... BIGL - BigL	Customer: BIGL - Big L Builders	Appointment D...: 0 h 00 m	
Service Order ... 006295	* Location: MAIN - Primary Location	Estimated Dur...: 32 h 00 m	
Status: Open	Currency: USD 1.00 VIEW BASE	Tax Total: 0.00	
Workflow Stage: Hold	* Branch Location: BRONX - Bronx Location	Service Order ...: 13,491.00	
	* Project: X - Non-Project Code	Billable Total: 0.00	
* Date: 1/15/2021		<input type="checkbox"/> Waiting for Purchased Items <input type="checkbox"/> Appointments Needed	
Customer Order: P01230525	Description: Build out Lot 0525 Left		
External Refer...			

[SETTINGS](#) [DETAILS](#) [TAX DETAILS](#) [APPOINTMENTS](#) [FINANCIAL SETTINGS](#) [DEFAULT STAFF](#) [ATTRIBUTES](#) [PREPAYMENT](#)

Override

CONTACT

Contact:

Company Name: [Big L Builders](#)

Attention:

Business 1

Email: [ap@bigl.com](#)

ADDRESS

[VIEW ON MAP](#)

Address Line 1:

Address Line 2:

City:

* Country: [US - United States of America](#)

State: [NJ - NEW JERSEY](#)

Postal Code:

SERVICE ORDER SETTINGS

SLA: [4/15/2021](#) | [6:00 PM](#)

Severity: [Medium](#)

Priority: [Medium](#)

Supervisor: [EP00000006 - Todd Bloom](#)

Problem:



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

Setup Service Orders

SETTINGS DETAILS TAX DETAILS APPOINTMENTS FINANCIAL SETTINGS DEFAULT STAFF ATTRIBUTES PREPAYMENTS TOTALS OTHER INFORMATION													
🔄 + ✖ ADD ITEMS ADD STAFF ALLOCATIONS CREATE EXPENSE RECEIPT 📄 📄 📄													
☑	📄	* Branch	Ref. Nbr.	Line Status	Line Type	Inventory ID	Billing Rule	Description	UOM	Warehouse	Estimated Duration	Location	Estimated Quantity
>	☑	PRODWHOLE	0001	Requiring Schemul...	Inventory Item	FSDUCT	Flat Rate	Running Feet of 12" Insulated Flexible Duct	FT	WHOLESALE	0 h 00 m	R1S1	400.00
	☑	PRODWHOLE	0002	Requiring Schemul...	Service	INSTALL	Flat Rate	Installation Services - Flat Rate	EA	WHOLESALE	16 h 00 m	R1S1	1.00
	☑	PRODWHOLE	0003	Requiring Schemul...	Inventory Item	IND24ANB1	Flat Rate	Infinity 21 Central Air Conditioner by Carrier	EA	WHOLESALE	0 h 00 m	R1S1	1.00
	☑	PRODWHOLE	0004	Requiring Schemul...	Service	INSTAC	Flat Rate	Air Conditioner Installation Service	EA	WHOLESALE	16 h 00 m	R1S1	1.00



Setup Create Appointments

Branch	Ref. Nbr.	Line Status	Line Type	Inventory ID	Billing Rule	Description
PRODWHOLE	0001	Requiring Scheduling	Inventory Item	ESDUCT	Flat Rate	Running Feet of 12" Insulated Flexible Duct
PRODWHOLE	0002	Requiring Scheduling	Service	INSTALL	Flat Rate	Installation Service
PRODWHOLE	0003	Requiring Scheduling	Inventory Item	IND24ANB1	Flat Rate	Infinity 21 Central
PRODWHOLE	0004	Requiring Scheduling	Service	INSTAC	Flat Rate	Air Conditioner Installation

Overview / Navigation / User Experience

- **Demo Focus:**
- **Focus on Management of Resources**
- **Tracking Inventory Requirements**
- **Mobility**
- **Ease of Final Billing**

Screen captures of the actual demo are given below.

The Final Story Board

- The Service Order
- The Appointments
- Dispatch
- Track Time and Expenses
- Mobile Tech
- Review and Billing

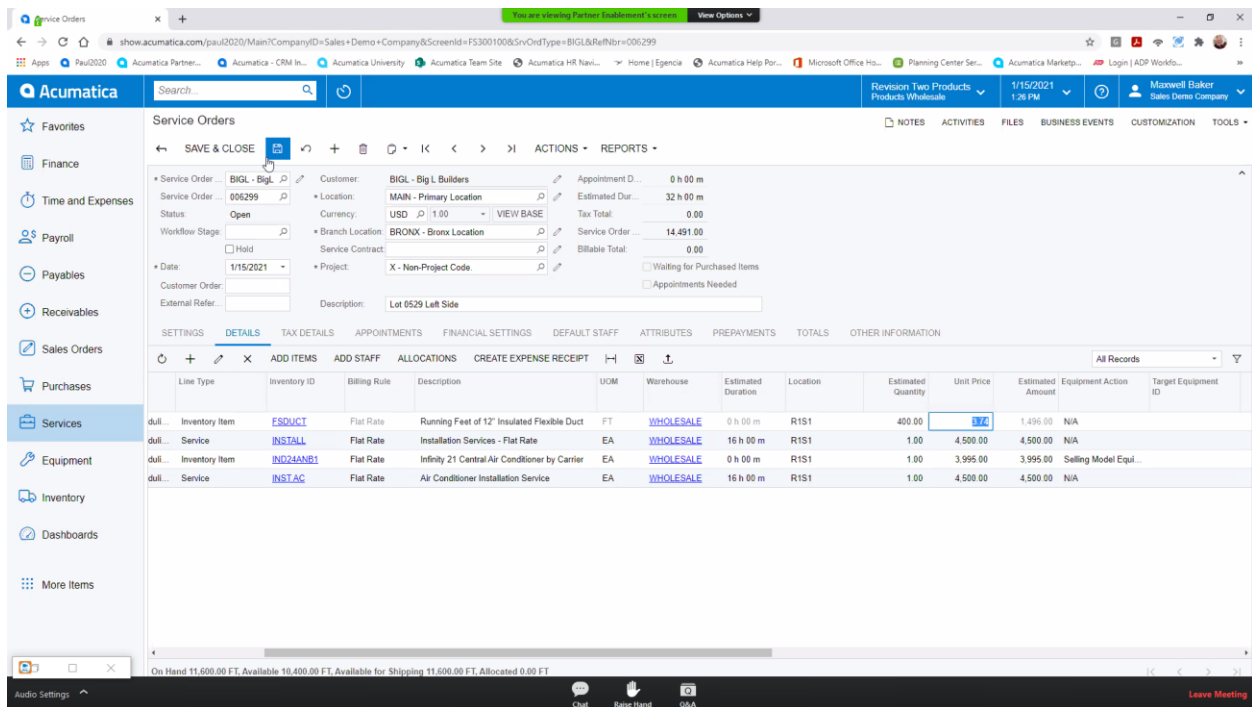
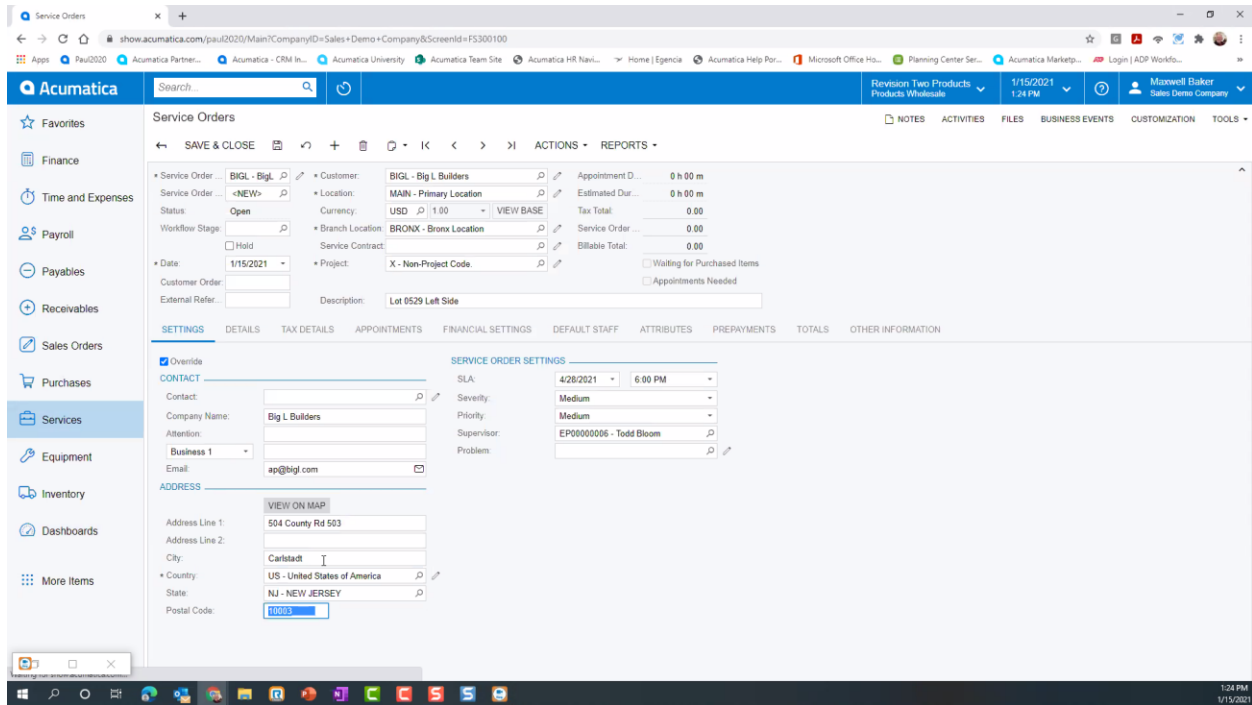
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Customers

Customer ID: BIGL - Big L Builders Balance: 13,491.00
Status: Active Prepayment Balance: 0.00
Customer Class: LOCAL - Domestic Customers Retained Balance: 0.00

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
FBR	AP AP	Billing Customer	Service Order	None
PBC	AP AP	Billing Customer	Service Order	None
BIGL	SO SO	Billing Customer	Service Order	None

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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.

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The screenshot shows the Acumatica Service Orders interface. The top navigation bar includes the Acumatica logo, a search bar, and user information for Maxwell Baker at Sales Demo Company. The main header displays 'Service Orders' with navigation icons and 'ACTIONS · REPORTS ·'. Below this, a summary section shows details for Service Order 006298, including customer 'BIGL - Big L Builders', location 'MAIN - Primary Location', and status 'Open'. A table of items is displayed below the summary:

Branch	Ref. Nbr.	Line Status	Line Type	Inventory ID	Billing Rate	Description	UOM	Warehouse	Estimated Duration	Location	Estimated Quantity	Unit Price
PRODWHOLE	0001	Requiring Scheduling	Inventory Item	FSDUCT	Flat Rate	Running Feet of 12" Insulated Flexible Duct	FT	WHOLESALE	0 h 00 m	R1S1	400.00	3.74
PRODWHOLE	0002	Requiring Scheduling	Service	INSTALL	Flat Rate	Installation Services - Flat Rate	EA	WHOLESALE	16 h 00 m	R1S1	1.00	4,000.00
PRODWHOLE	0003	Requiring Scheduling	Inventory Item	IND24AMB1	Flat Rate	Infinity 21 Central Air Conditioner by Carrier	EA	WHOLESALE	0 h 00 m	R1S1	1.00	3,995.00
PRODWHOLE	0004	Requiring Scheduling	Service	INSTAC	Flat Rate	Air Conditioner Installation Service	EA	WHOLESALE	16 h 00 m	R1S1	1.00	4,000.00

At the bottom of the screen, a status bar indicates: 'On Hand 11,600.00 FT, Available 10,800.00 FT, Available for Shipping 11,600.00 FT, Allocated 0.00 FT'.

The screenshot shows the Acumatica Appointments interface. The top navigation bar is similar to the Service Orders screen. The main header displays 'Appointments' with navigation icons and 'ACTIONS · REPORTS · PAUSE · RESUME'. Below this, a summary section shows details for Appointment 006298, including customer 'BIGL - Big L Builders', location 'MAIN - Primary Location', and status 'Not Started'. A table of items is displayed below the summary:

Branch	Ref. Nbr.	Line Status	Line Type	Inventory ID	Billing Rate	Description	Equipment Action	Target Equipment ID	Model Equipment Ref. Nbr.	Component ID	Component Ref. Nbr.	Staff Ref. Nbr.
PRODWHOLE	0001	Not Started	Inventory Item	FSDUCT	Flat Rate	Running Feet of 12" Insulated Flexible Duct	N/A					<SPL
PRODWHOLE	0002	Not Started	Service	INSTALL	Flat Rate	Installation Services - Flat Rate	N/A					<SPL

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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.

The screenshot shows the Acumatica 'Appointments' interface. A 'Add Staff' dialog box is open, allowing the user to assign staff to a service order. The dialog contains the following information:

- Service Ref. Nbr.:** 0002
- Postal Code:** 07972
- Service Area:** (empty)

The dialog displays two tables of available skills/licenses and a list of eligible employees:

Skill ID	Description	Service List
DB	Database management	
DRIVER	Driver Skill	
HARDWARE	Computer Hardware Prof...	
NETWORK	Network Administrator	
SOFTWARE	Computer Software Prof...	

License Type ID	Description
CYSCO CCN	CySCO Certified Network
CYSCO CCN DC	CySCO Certified Network - Data Center
CYSCO CCN R S	CySCO Certified Network - Routing and Switching
CYSCO NETWORK P	CySCO Partner - Advanced Enterprise Networks Arc...
CYSCO ROUTING P	CySCO Partner - Advanced Service Provider Routin...
MYCROSOFT MCSE	Mycrosoft Certified Solutions Expert

Type	Staff Member ID	Staff Member Name
Employee	EP00000...	Michael Andrews
Employee	EP00000...	Maxwell Baker
Employee	EP00000...	Layla Beauvoir
Employee	EP00000...	Joseph Becher
Employee	EP00000...	Martin Bernia
Employee	EP00000...	Todd Bloom
Employee	EP00000...	Pam Bravner
Employee	EP00000...	Michal Bujack
Employee	EP00000...	David Chubb
Employee	EP00000...	Steve Church
Employee	EP00000...	Jesus Correa
Employee	EP00000...	Eric Cozzi
Employee	EP00000...	Rick Domenico
Employee	EP00000...	Neil Frieichs
Employee	EP00000...	Michal Harpejs

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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.

The screenshot displays the Acumatica software interface. On the left is a navigation sidebar with categories like Finance, Payroll, and Services. The main area is split into two panes. The left pane, titled 'Calendar Board', shows a list of 'Service Orders' with columns for Appointment, Customer, Service Order, and Quantity. The right pane, titled 'Dashboard', is a Gantt-style calendar grid. The columns represent staff members: Chubb, Eric Cozzi, Fadi Kabuk, Jesus Correa, John Kinne, Joseph Becher, Maxwell Baker, and Michael Andrews. The rows represent time slots from 11:00 to 21:00. Various colored blocks (blue, green, red) represent appointments, each with a service order ID and status (e.g., 'In process', 'Scheduled').

Add staff

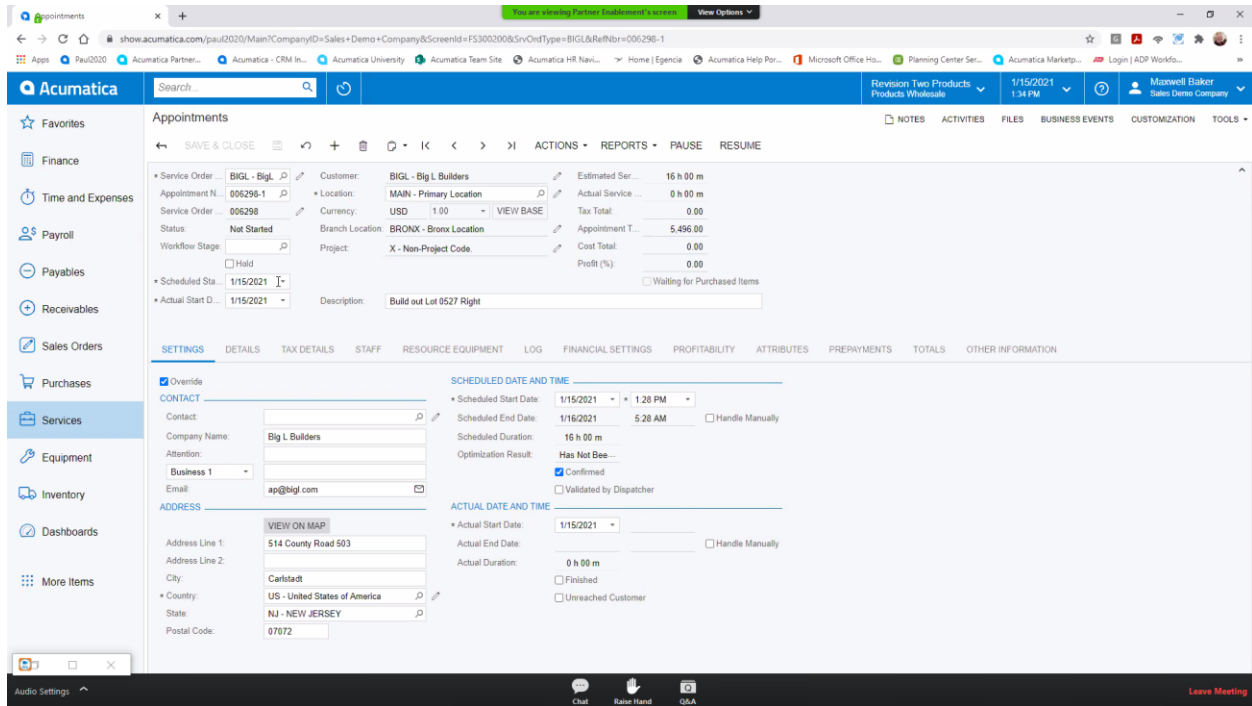
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The screenshot displays the Acumatica Calendar Board. On the left, there is a sidebar with navigation options like Finance, Time and Expenses, Payroll, Payables, Receivables, Sales Orders, Purchases, Services, Equipment, Inventory, and Dashboards. The main area is divided into two panes. The left pane, titled 'Service Orders', shows a list of orders with columns for Service Order, Q, Customer, and Service Ord. The right pane, titled 'Dashboard', shows a calendar grid with columns for staff members (Anna Johnson, David Chubb, Eric Cozzi, Fadi Kabuk, Jesus Correa, Maxwell Baker, Michael Andrews, Michael Bujacek) and rows for time slots from 8:00 to 17:00. A red appointment block is visible for Maxwell Baker at 9:00 AM, with details like '000298-2', '000298', 'Scheduled', 'Sig L Builders', 'Primary Location', 'Air Conditioner...', and 'Not Confirmed'.

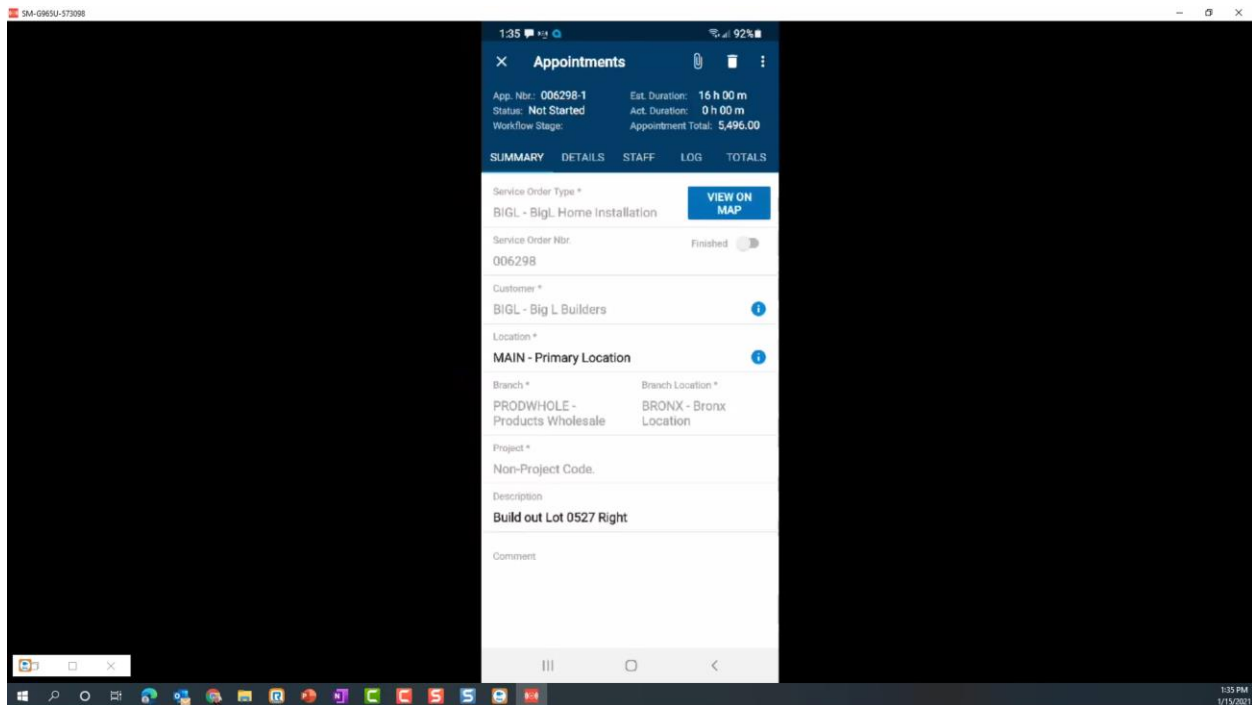
Alternatively, you can make an appointment using the appointment form.

The screenshot shows the Acumatica Appointment form. The 'Add Staff' dialog box is open, displaying a list of staff members to be assigned to the appointment. The dialog has fields for 'Service Ref. Nbr.' (0006), 'Postal Code' (07072), and 'Service Area'. Below these fields are two lists of skills and staff members. The skills list includes 'DB Database management', 'DRIVER Driver Skill', 'HARDWARE Computer Hardware Prof...', 'NETWORK Network Administrator', and 'SOFTWARE Computer Software Prof...'. The staff list includes 'Employee EP00000... Michael Andrews', 'Employee EP00000... Maxwell Baker', 'Employee EP00000... Layla Beauvoir', 'Employee EP00000... Joseph Becher', 'Employee EP00000... Martin Bernia', 'Employee EP00000... Todd Bloom', 'Employee EP00000... Pam Brawner', 'Employee EP00000... Michal Bujacek', 'Employee EP00000... David Chubb', 'Employee EP00000... Steve Church', 'Employee EP00000... Jesus Correa', 'Employee EP00000... Eric Cozzi', 'Employee EP00000... Rick Domenico', 'Employee EP00000... Neil Frerichs', and 'Employee EP00000... Michal Hampajs'. An 'OK' button is at the bottom right of the dialog.

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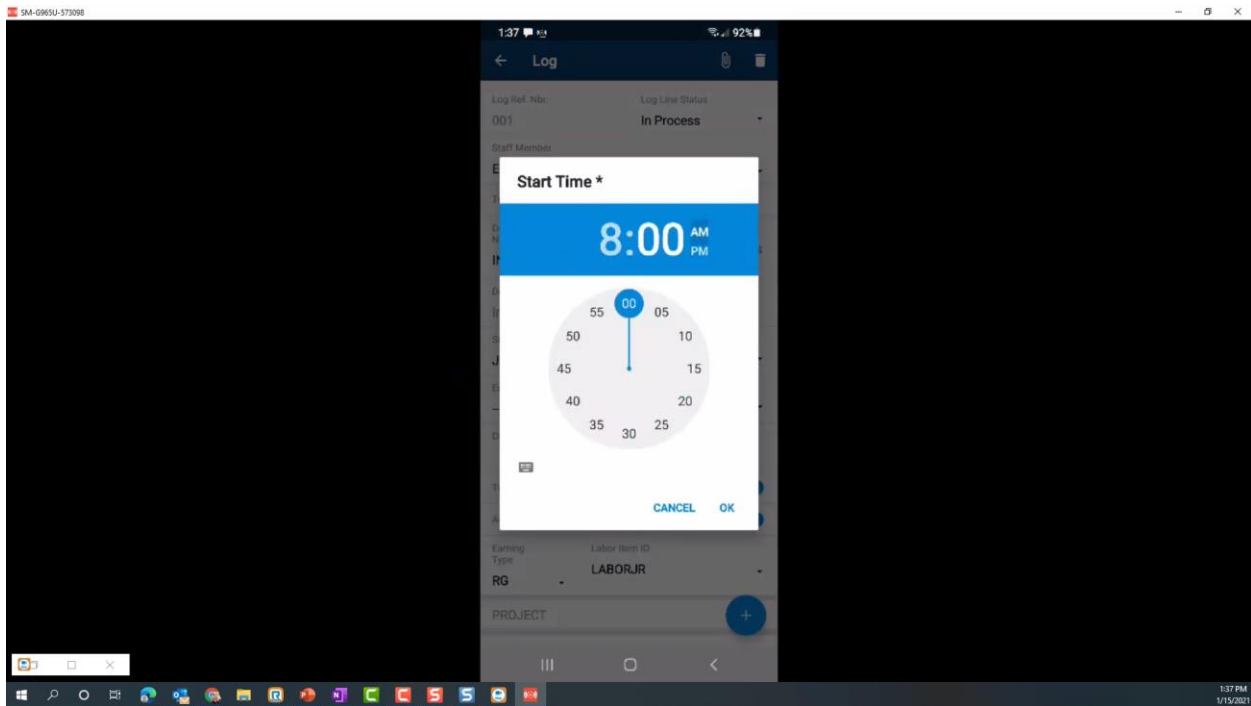
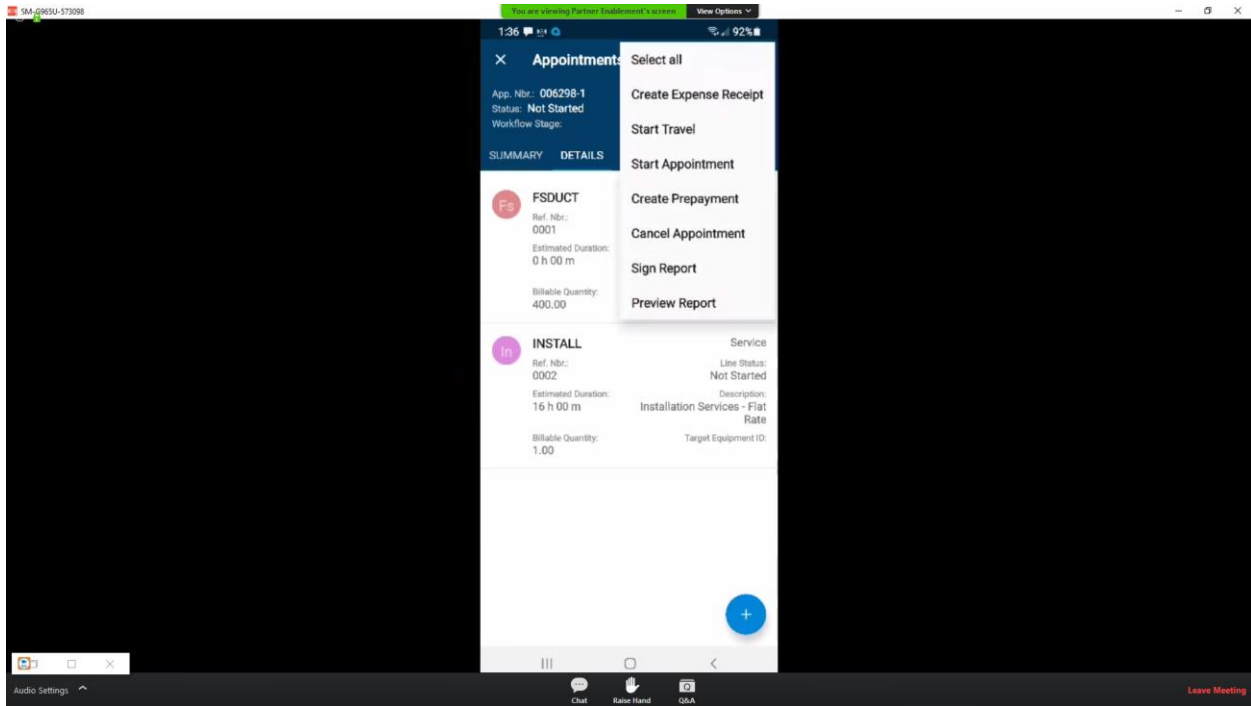
The technician employee or crew can check their appointments in the Acumatica mobile app. The technician signs into his/her mobile app and can view their appointments for a particular day. For an appointment, the can check the address of a customer on a map in the mobile app.



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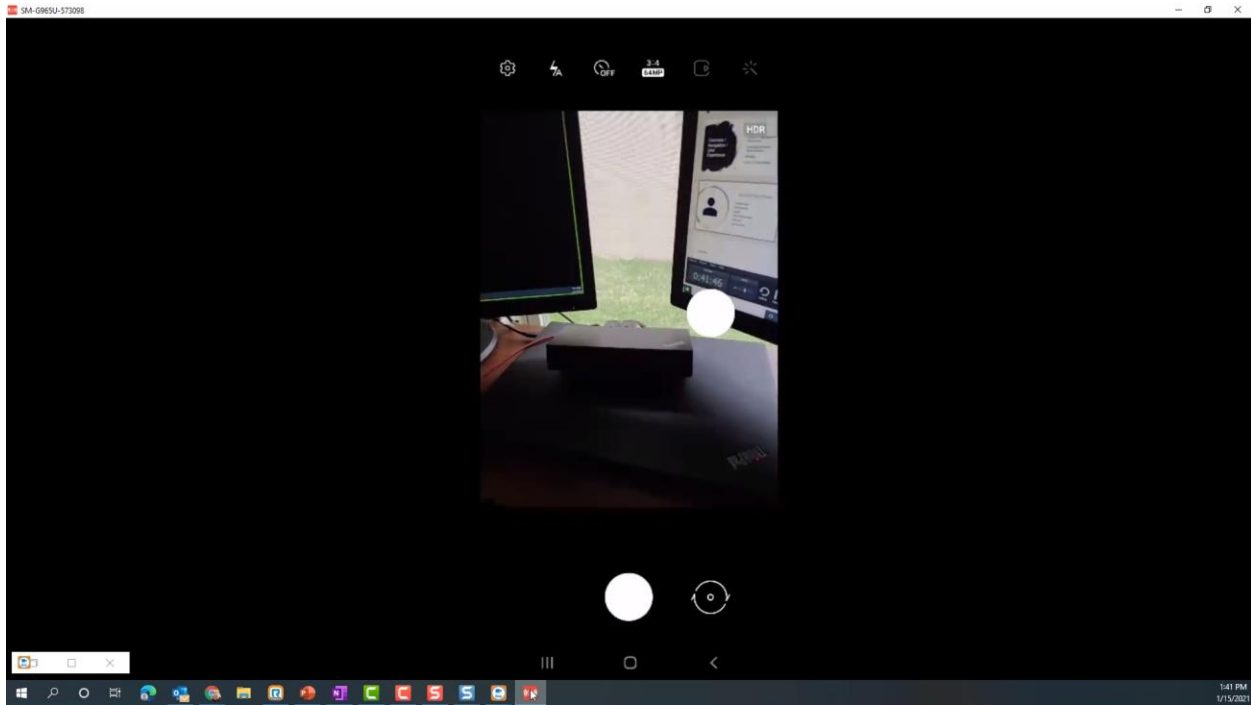
In this case two line items (the 12' feet duct, and the installation of the duct) show up in his appointment. The technician can click on start travel when he leaves for the job/appointment.



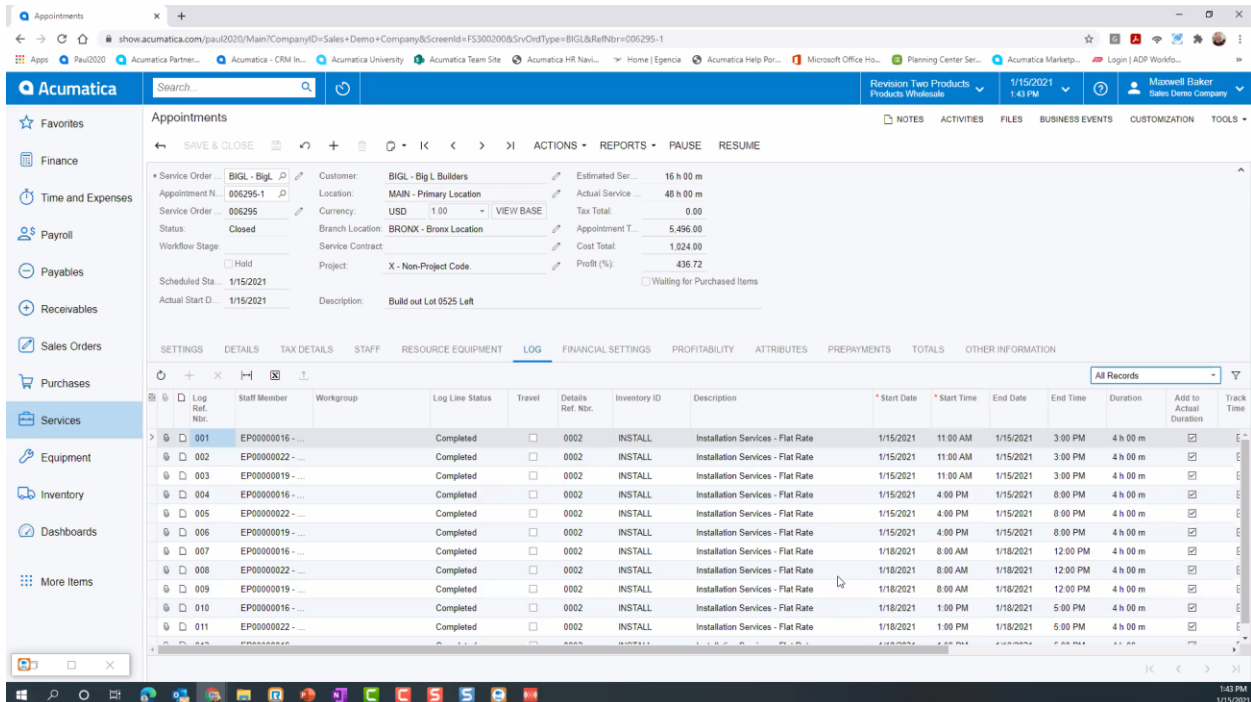
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The technician can take a picture of the customer site.



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.



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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.

The screenshot shows the Acumatica interface with the 'Profitability' tab selected. The appointment details are as follows:

- Service Order: BIGL - Big L
- Appointment Nbr: 006295-3
- Customer: BIGL - Big L Builders
- Location: MAIN - Primary Location
- Estimated Service: 16 h 00 m
- Actual Service: 25 h 00 m
- Currency: USD 1.00
- Branch Location: BRONX - Bronx Location
- Tax Total: 0.00
- Appointment Total: 7,995.00
- Cost Total: 2,400.00
- Profit (%): 233.13
- Description: Build out Lot 0525 Left

Ref. Nbr.	Line Type	Inventory ID	Description	Staff Member	Unit Price	Unit Cost	Estimated Quantity	Estimated Amount	Estimated Cost	Actual Duration	Actual Quantity	Actual Amount	Ext. Cost
0001	Inventory Item	IND24ANB1	Infinity 21 Central Air Conditioner by Carrier		3,995.00	2,000.00	1.00	3,995.00	2,000.00	0 h 00 m	1.00	3,995.00	2,000.00
0002	Service	INST AC	Air Conditioner Installation Service		4,000.00	400.00	1.00	4,000.00	400.00	25 h 00 m	1.00	4,000.00	400.00

The screenshot shows the Acumatica interface with the 'Profitability' tab selected. The appointment details are as follows:

- Service Order: BIGL - Big L
- Appointment Nbr: 006295-1
- Customer: BIGL - Big L Builders
- Location: MAIN - Primary Location
- Estimated Service: 16 h 00 m
- Actual Service: 48 h 00 m
- Currency: USD 1.00
- Branch Location: BRONX - Bronx Location
- Tax Total: 0.00
- Appointment Total: 5,496.00
- Cost Total: 1,024.00
- Profit (%): 436.72
- Description: Build out Lot 0525 Left

Ref. Nbr.	Line Type	Inventory ID	Description	Staff Member	Unit Price	Unit Cost	Estimated Quantity	Estimated Amount	Estimated Cost	Actual Duration	Actual Quantity	Actual Amount	Ext. Cost
0001	Inventory Item	FSDUCT	Running Feet of 12" Insulated Flexible Duct		3.74	0.86	400.00	1,496.00	344.00	0 h 00 m	400.00	1,496.00	344.00
0002	Service	INSTALL	Installation Services - Flat Rate		4,000.00	200.00	1.00	4,000.00	200.00	48 h 00 m	1.00	4,000.00	200.00
0003	Labor	LABORSUPP	Labor - Support	EP00000019 - ...	30.00					4 h 00 m	4.00	120.00	120.00
0006	Labor	LABORSUPP	Labor - Support	EP00000019 - ...	30.00					4 h 00 m	4.00	120.00	120.00
0009	Labor	LABORSUPP	Labor - Support	EP00000019 - ...	30.00					4 h 00 m	4.00	120.00	120.00
0012	Labor	LABORSUPP	Labor - Support	EP00000019 - ...	30.00					4 h 00 m	4.00	120.00	120.00