

CREW ACTIVITY ENHANCEMENTS

The enhancement provides the ability to create service orders & appointments from sales order entry for model equipment or service type order lines taking into account skill & license setting & availability of technicians. Employees clock-in & outs are tracked for created tasks using templates defined. Added dashboard & automated alerts display status of each task (& project) comparing planned VS actual due dates and work hours.

ENTER TECH SCHEDULING INFO FOR EACH LINE

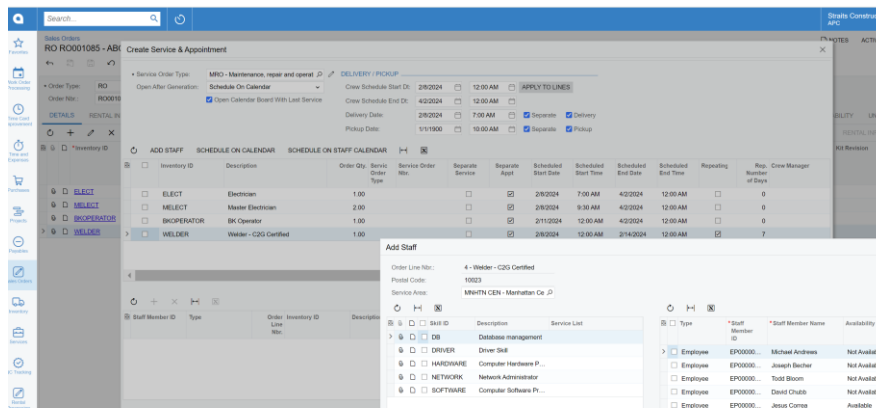
- **Select Technicians for Each Line on the Sales Order Details Grid.** Ability to view available technicians with required license and skill set. Select one or multiple technicians for each line.
- **Display Calendar Board for Created Service Orders and Appointments.** Ability to access the calendar board directly from sales orders after creation of the service orders and appointments to make final adjustments to time and dates after reviewing other transactions on the calendar board.

CREATE TASKS & ACTIVITIES BASED ON TEMPLATES

- **Define planned work hours and duration by each step in the project implementation template.**
- **Reporting on Progress of Projects.** Auto generated emails alert project managers and customers of issues with progress on the project related to completion date and number of hours consumed for each task.

EMPLOYEE CLOCK-IN & OUT

- **Support for Employee Clock-In & Out.** Track employee clock-in & outs and provide views on dashboards showing actual VS planned hours and completion timeline.
- **Setup Tracking on Hour by Transaction.** Manage by employee applications to track hours for. Creation of CRM activity in the transaction for the reported hours by employee.



KEY BENEFITS

STREAMLINE GENERATION OF SERVICE ORDERS AND APPOINTMENTS

- Ability to create service orders and appointments directly from sales order entry using the added Create Service and Appointment action.
- Option to prevent the creation of Services transactions, or to warn the user if the selected technician is not available on selected days or doesn't have the skill set and license required for the work.
- The option to create repeating appointments based on set frequency.

GENERATION OF CRM TASKS BASED ON PROJECT TEMPLATES

- Ability to create CRM tasks and activities based on templates.
- Ability to setup number of hours and duration by each task.
- Creation of alerts on status of each task.

ACCESS CALENDAR BOARD DIRECTLY FROM SALES ORDER

- Ability to access the Calendar Board directly from the sales order.

ENANCED SO TO SERVICES LINK FEATURES AND CAPABILITIES

Set Scheduling Requirements at the time Order Line Entry	Select technician, schedule starting and ending dates, and service order type from order line / Details grid.
Dispatch Selected Technicians at a Later Day	Ability for dispatcher to view and schedule selected technicians for the sales order line at a later date from the sales order.
Dispatch all Lines on the Sales Order from one Screen	Generate service orders and appointments for all sales order lines using the Create Service and Appointment action added to the sales order from.
Access Calendar Board from SO	Access the Calendar board directly from sales order displaying all dispatched technicians. Make final changes to created transactions as needed.
Skill and License Requirement Tracking	Display a warning or prevent users from creating appointments based on set preferences, if tech doesn't have the needed skill/license requirements.
Availability Tracking for Technicians	Display a warning or prevent dispatcher from creating appointments if technician is not available on the entered date based on preferences set.
Generate Alerts Based on Project Performance	Creation of emails based on missed completion dates and project overruns.
Flag Order Line Types Eligible for Scheduling	Setup desired stock and non-stock item types eligible for scheduling.
Set Required Scheduling Dates	Set required schedule starting and ending date and times for each order line.
Delivery and Pickup Scheduling	Creation of appointment for delivery of products sold, or for delivery and pickup of rental orders.
Tracked Changes to Due Date or Planned Hours for Task	Tracking of changes to task due date or completion hours entered by employee during reporting of hours.

THE ACUMATICA ERP DIFFERENCE

Acumatica delivers a full suite of integrated business management applications unlike any other ERP solution today.

STREAMLINE OPERATIONS

Manage your business more efficiently:

- Automate processes.
- Control workflows
- Access the system from anywhere on any device – including mobile.
- Promote collaboration with all-inclusive user licensing

ADAPTABLE SOLUTION

Add and extend:

- Deploy in-house or in a private or public cloud
- Easily configure your solution to fit your needs
- Add capabilities such as CRM or data visualization at any time
- Extend to other solutions and applications beyond ERP

YOUR BUSINESS ACCELERATED

- Accelerate business performance and make smarter decisions with automated processes, real-time data collection, financial analyses, and forecasting
- No per user pricing – system scales as your business grows