

FIELDPOINT | 2020 WHITE PAPER

# FIELD SERVICE INTEGRATION: ACHIEVING END-TO-END FSM

The software and systems you need to become a fully automated field service operation.



# Introduction

When looking at the bigger picture of field service, the truth is field service businesses are using multiple software solutions. There is scheduling and routing software, work order management systems, accounting, ERP and CRM systems, and many other forms of software that field service businesses use daily.

According to Salesforce's Third Edition of their Small & Medium Business Trends Report, the average small business uses 4.3 business applications, while medium-sized businesses use 6.8 business applications. It takes more than one system to successfully run a field service operation, so multiple software solutions need to be deployed to achieve success.

However, true success in field service comes from business automation to enable things to happen automatically, speeding up processes and ultimately running a more efficient business. To accomplish automation, field service businesses can choose one of two options:

1. Find one software that encompasses all of their field service needs; or,
2. Implement multiple software systems that excel in their one particular function and integrate those systems.

Finding one field service system that can deliver exceptionally well on every aspect is extremely difficult. Can you truly find a system that houses



an ERP system along with an accounting software that also allows you to manage work orders, projects and contracts, all while handling the dispatching, scheduling and routing of your technicians? That's a lot for any one software system to master, so many in the field service industry choose to work with option 2 – finding the best software solution possible for a specific job and integrating that solution with other systems to share data and information.

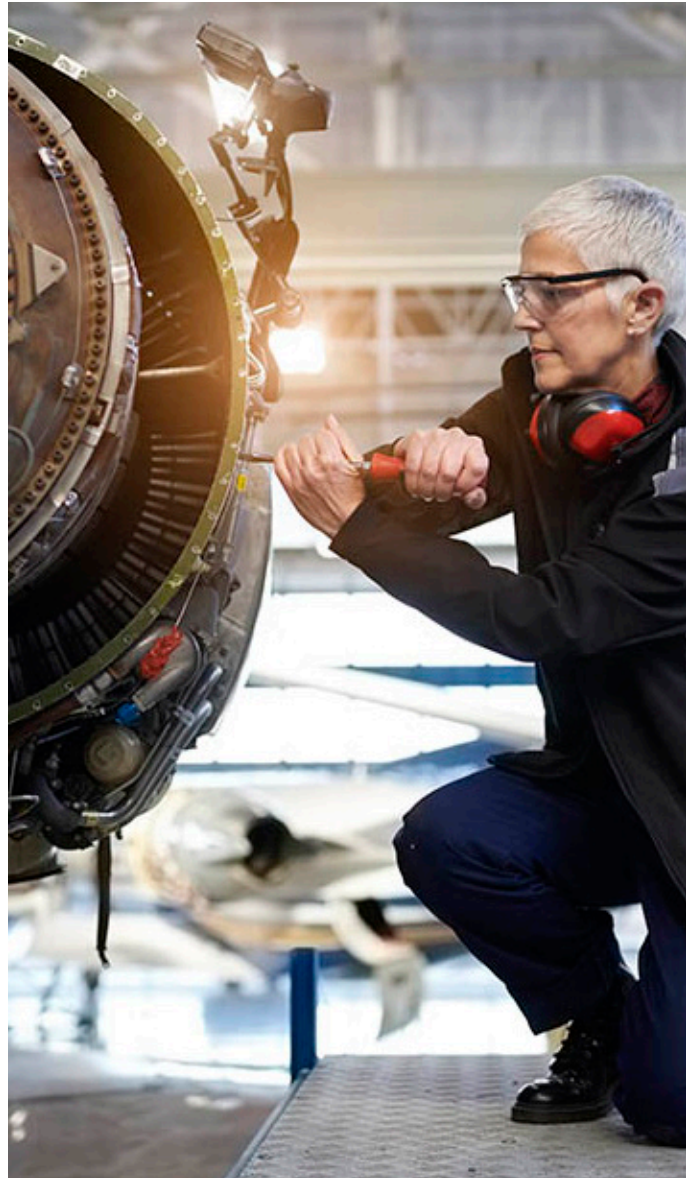
This creates what is often called “end-to-end field service management.” It joins together all the software and systems that field service businesses use, and connects them to form a fully-automated service application that shares information, automates processes and enables employees to live in their own system(s) while still accessing data and information from another.

# How is this achieved?

To achieve true business automation, you first need to look at the bigger picture of your field service environment. One of the largest problems when purchasing software is that it only fulfills one piece of a much larger picture, and that piece needs to integrate with the rest of your system. Working with a software provider that only considers their piece of the picture can make it difficult to integrate your systems.

At the core of your integration should be your field service software. All other systems will provide information to that system or pull information out of that system to complete their own designated tasks. It can be broken down into pre-sales software, which includes customer engagement and lead management tools, as well as flat-rate price books and sales tools. ERP systems coming into your field service software provide you with the critical data you'll need to produce work orders, as well as purchasing and inventory tools. Coming out of the field service software will be a need for an integrated accounting system to automate invoice production.

It's a complex system that needs to be looked at on a much larger scale. Here are some of the systems you would consider integrating into a much larger, end-to-end field service environment:



# What systems need to be integrated

Field service leaders are looking for robust software that can solve many of their deepest problems; this is why field service software is designed to tackle the service delivery challenges leaders face on a daily basis. According to a recent IBIS World report on Field Service Management Software in the US, the main product field service businesses are looking to add to their operations is around scheduling and routing service. Over 35% of the report's respondents said it was the most popular option to be added.

This was immediately followed by:

- Work order management services
- Customer engagement management services
- Invoicing and accounting services
- Inventory, logistics and parts planning services

A field service management software, such as Fieldpoint, can handle the scheduling and routing services that leaders in the industry want to improve on. It can also handle the work order management services, which is the backbone of many field service management software systems; however, customer engagement management and inventory, and parts planning are part of a separate service. They are just as important to the operation of a field service company as scheduling a technician, but they're better-suited to be handled with software that is dedicated to their needs.



Also, inside work order management comes a need for other systems, such as an ERP system for customer and vendor information, which also houses a system for parts and inventory. Software such as NetSuite, QuickBooks, Microsoft Dynamics Business Central and Microsoft Dynamics NAV are essential components of any field service management system and need to be fully integrated into your field service software. In fact, you would be hard-pressed to find a field service software that doesn't have an integration to an ERP system because the two work so closely together.

There is a large array of software that can be integrated into your field service software. With it, you can achieve a level of automation you didn't previously have and reduce the amount of manual data entry needed. Some of that software includes:

### **Customer engagement and lead generation**

Software specifically designed to capture, and nurture leads in your sales pipeline and develop them into customers while connecting existing customers with them to keep them in your pipeline and not your competition's. These types of customer engagement tools use integrations to your accounting and field service software to pull your customer list. From there, they find customers with untapped potential for revenue, and automatically send them communication to get them back with you. When new customers are added, the integration can create accounts and profile information that will be shared throughout your integrated system, including your ERP, accounting, and field service software.

### **Flat rate price books**

Mobile sales tools like flat rate pricing books integrate into your field service software system and are part of your quoting functionality. Offer different levels of service agreements to potential customers and grow revenue with extended service plans and financing terms. Present professional looking displays with a catalog of your parts, build custom templates for part installation and accurately build quotes for your customer in the field. Turn these flat rate price books into work orders in your field service software and export the invoices to your accounting system.

### **Work order creation**

Manage in-house technicians for facilities management with work order integration that enables employees to request service. This automatically creates a work order in your field service software. Information is updated through the field service software on these service

requests and will update the original request. Track specific equipment in these third-party systems, such as Service Channel, and monitor equipment usage so that you are making smarter decisions on repair and replacements.

### **Labor marketplaces**

For field service businesses who want to use subcontractors for maintenance and installation projects, labor marketplaces are available to find suitable subcontractors. Integrations to these systems allow service managers to upload their work orders to third-party channels and accept bids and quotes for the job, without going outside their own system. Accept bids, complete on-boarding of subcontractor, dispatch work orders using the mobile field service app and complete the calls with subcontractor management functions. With this network of integrations, you can go from closing the work order in the field to generating an invoice and payment voucher to get the subcontractor paid quickly.

### **Tax automation**

Automate the sales tax calculation and compliance with your existing ERP, POS and e-commerce system with an integration to a tax automation software. It's a worry-free way to manage the compliance of all tax laws within your area and assures that all work orders have the proper tax calculation completed for accurate billing, and fulfillment of tax requirements.

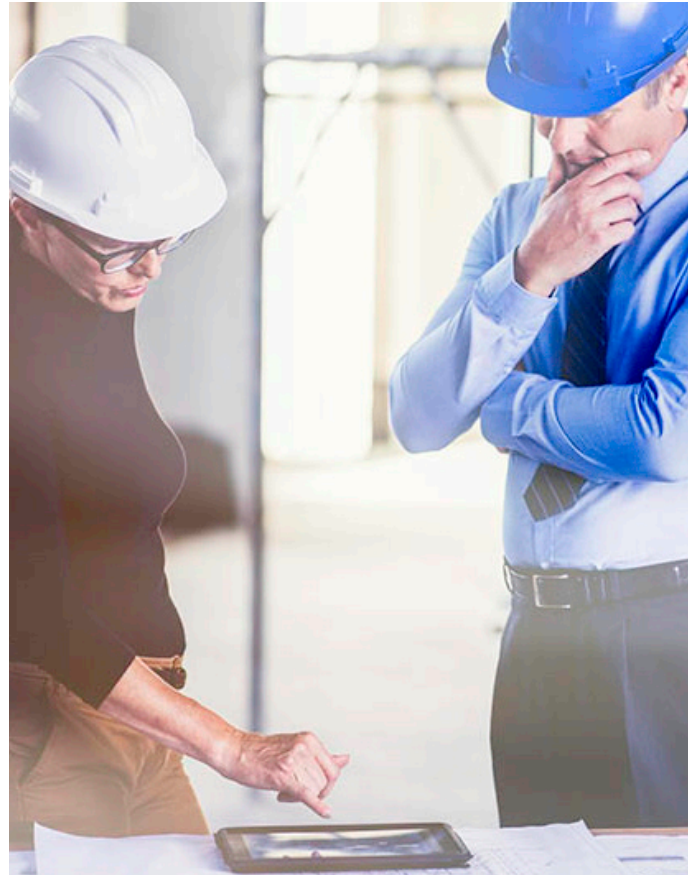
# A holistic view of field service

Modernizing your field service operations can be extremely challenging. However, it's a necessity for service organizations to start digitally transforming their field service operations in order to create a better working environment. It's imperative to look at field service from a holistic view and realize that every action taken in one part of the business can affect, both for good and bad, another part of the business.

That is why having a field service software provider who is willing to look at the entire scope of your business is very important to the success of your digital transformation. According to Cleo, an integration platform, 29% of businesses consider a lack of skilled resources to build and manage integrations between systems, applications, and partner ecosystems as their top challenge for modernizing their business. While 25% say the biggest challenge is integrating new applications in general.

With most software moving towards the cloud, it opens new pathways to easier integration. Fieldpoint's field service software has an open API and a data transfer service that makes it easy to integrate to additional systems. Whether that be an ERP, CRM or accounting system, or a specialty software dedicated to your specific business activities, Fieldpoint can complete almost any custom integration and share data between systems.

Fieldpoint has already integrated with prominent ERP systems, such as NetSuite, QuickBooks, Microsoft Dynamics Business Central and Microsoft Dynamics NAV, as well as tax



software, such as AvaTax, and Salesforce. Fieldpoint has recognized the need for labor market integrations, and has a built-in integration with WorkMarket, and work order systems for facility maintenance, such as ServiceChannel.

More importantly, we look at your bigger picture. Trying to solve just scheduling and dispatch concerns isn't enough. It's why we specialize in end-to-end field service management and automation. In order to truly automate your field service business, it must come with additional software and integration lines. So, from the very beginning, it's important to also include your ERP system, your tax software, any sales software you use, and your accounting system into the conversation, even when just trying to solve the basic field service challenges.

According to Cleo, 60% of businesses see end-to-end data visibility as an important requirement to manage their digital ecosystem. Onboarding is considering one of the largest challenges to complete from the very beginning because it can be time consuming to enter in all critical data information into a new system. However, with an integration, such as from an ERP system to your field service software, onboarding struggles are drastically reduced.

Customer, vendor and resource information from your ERP is imported into your field service software and you're up and running in moments. Without someone looking at a holistic view of your business, integrations can still seem chal-

lenging. Fixing one problem can create many more, so working with a company that already knows the challenges you are going to face can be the difference in getting a complete end-to-end field service experience and true business automation.

To modernize and achieve true business automation, field service organizations must automate data transaction processes of all their software applications, build an end-to-end field service environment that fits their specifically business needs, and maximize the value existing and new software you bring on board has to your entire operation.

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## About Us

Fieldpoint Service Applications is a developer of field service software. Our specialized integration with CRM, ERP and accounting systems provide our customers with enterprise visibility while streamlining sales and service operations. With over 25 years of experience, hundreds of valued customers in several verticals, and a solid network of reselling partners, Fieldpoint enables service organizations to run leaner, smarter and more profitably.

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