



FIELDPOINT'S OUT OF BOX INTEGRATION WITH NETSUITE

A streamlined link between your field service and ERP software

Fieldpoint is an end-to-end field service solution that comes out-of-the-box integrated with NetSuite for a streamlined link between your field service and accounting software. Whether completing work orders, long term maintenance contracts or installation projects, Fieldpoint's integration will keep NetSuite up to date with automated sales order creation to reflect work completed in the field.

This powerful integration extends the communication between Fieldpoint and NetSuite to eliminate the risk of errors through multiple entries of company profiles and billing information, while offering the ability to start work order creation from within either the Fieldpoint software, or from inside NetSuite.

From the very beginning, NetSuite synchronizes customer profile information, such as names, addresses and contacts, employee information, and products to be useable in Fieldpoint when creating work orders. Changes that occur in either system are updated through the integration, minimizing errors in data entry and time spent processing new data across two platforms.

For a field service organization in any space, having an integrated connection with your accounting software is a core fundamental feature when closing out work orders, purchasing inventory and completing the billing cycle.

Work Orders to Sales Orders

Whether a regular break/fix repair, a scheduled inspection as part of a service level agreement contract, or a task that's part of a large installation project, Fieldpoint's work order module creates available work orders to support your field service organization. With pre-assigned labor prices, access to parts inventory and the ability to add additional expenses from Fieldpoint, the work order process to billing is fully automated.

From the field, service technicians can have access to all work order information, assigned checklists and parts inventory from their mobile app. Technicians can input their time and labor hours, complete assigned checklists, attach photos and close out work orders with electronic signatures, while adding all expenses and job information to the work order.

Where the integration comes into play is through the adjoining created sales order in NetSuite that automatically updates line items initiated from the Fieldpoint work order, such as the time and labor costs the technician entered to complete the work order. Should a technician in the field consume a part on a work order, that part is added to the NetSuite sales order to be charged to the customer. If a part is not available, a requisition is created in Fieldpoint to acquire the needed part to complete a job, while an adjoining purchase order is created in NetSuite to order that part, which is then applied to the sales order for billing.



Technician Dispatch

Once a work order is created and ready to be assigned to a technician, there are many ways to select the right technician for the job. Searching by skill set is a great way to ensure the technician has all the qualifications, certifications and skills needed to complete a job requirement, and can help narrow down a large list of technicians and subcontractors to just those with the proper skills.

Geographical location can also play a factor in who is to be scheduled for a job, so the resource map in Fieldpoint will plot out all your technicians closest to a job site, and allow you to select and route the right technician to the job, cutting down on travel time.

And through the availability calendar, dispatchers can see all their technicians and their schedules, and select the available technician by easily dragging and dropping the work order into their schedule to assign them the job.

Mobile Application

Utilizing the field service mobile app, technicians can directly access work order information from the field, with online and offline capabilities to ensure they have access to the work order, regardless of an internet connection. Technicians can complete guided service checklists, record labor, expenses and parts used. That information is sent back to the dispatch and updated in the Fieldpoint work order.

Those updated expenses, through the integration, go from the work order to the NetSuite sales order to become line items. From the field to Fieldpoint to NetSuite, the integration allows field technicians to have a direct effect on NetSuite sales and purchase orders, all while staying in their own Fieldpoint mobile app, and not having to access the accounting software.

Projects to Sales Orders

For complex jobs that extend over weeks or months, such as installations, Fieldpoint's project module offers a robust system to manage quoting labor and materials, planning and allocating resources and purchasing all necessary items. Manage job costing with Fieldpoint's budget and task management functions, and offer flexible billing options, such as progress billing where you can bill a customer based on phases of the project, or on a weekly, monthly or yearly schedule, all within Fieldpoint's project billing function. All these projection management components ensure your customer projects are completed on time and come in on budget. >>>

Through NetSuite, sales orders are created based on billing schedules assigned in Fieldpoint, while parts that are requisitioned in Fieldpoint are consumed from NetSuite's inventory, or produce purchase orders to get the parts to the job site. These create line items on the sales order, effectively all managed by Fieldpoint's project module.

Resource Planner

For long-term projects, assigning technicians and contractors is a difficult task. With Fieldpoint's resource planner, see the entire scope of the project and what tasks need to be assigned while also seeing your technician's schedule, all within one screen. A simple drag and drop feature assigns the technician to the task, adding it to their schedule.

You can view technicians based on job skills, or the requirements of the job, while also reducing conflict in scheduling between your regular break/fix repairs and your projects, as the full technician's schedule will be made available in the resource planner. Be able to look ahead weeks or months to ensure the right technicians are available to be scheduled when quoting a timeline for a project, and make adjustments as needed to guarantee the end date you set with your customer.

Business Intelligence Module

Closely manage budgets, costs and margins for a single project, or across a complete customer portfolio with Fieldpoint's Business Intelligence reporting and analytics engine. Effectively drill-down into specific key performance indicators in a chart or list form to monitor trends and make more informed business decisions.

Indicators can be tailored to a specific person, such as a service or sales manager. Track contract profitability and service trends to see service level attainment and what type of calls your office is fielding during that time, or drill down on your most used parts and expenses to improve ordering and cash flow. Needs change based on department, territory, and products, and Fieldpoint's business intelligence can effectively give you a business overview from multiple levels.

Contracts

Administer customer maintenance agreements and preventative maintenance schedules using Fieldpoint's contract module. Have work orders generate automatically based on customer maintenance plans, which will automatically create an adjoining sales order in NetSuite. Track customer pricing, service level agreements and automate the process of creating work orders and sales orders in the integrated system. Have checklists, parts and instructions automatically attached to requiring work orders to automate the process, ensuring the same level of efficient service at every visit.

Preventative Maintenance Manager

Along with automating the scheduling of work orders, the preventative maintenance manager can allocate parts and generate appropriate checklist templates to make sure work orders are completed correctly every time.

Contract Billing

A billing schedule can be set up for each customer's contract, where the billing intervals, prices, and renewal intervals are all identified. Contract billing automatically generates a NetSuite sales order, ensuring improved cash flow for your service organization, without the need for administrative assists in creating the work order and sales order.