fieldpoint
service applications inc.

Fieldpoint and NetSuite

THE RIGHT COMBINATION TO UNLEASH YOUR FIELD SERVICE POTENTIAL

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CHAPTER 1: BEST OF BREED SERVICE SOFTWARE

If you run a field service organization, you want a software solution that handles all your service needs. That's the fundamental aspect of anyone looking at implementing a field service management system, that your priority should be what it does to help your service department achieve greater success in areas such as:

- Work order automation
- Scheduling and dispatch
- Technician efficiency
- Contract management
- Job costing and analytical reporting
- Field service mobility

At Fieldpoint, what we do best is manage field service operations, enhance your service delivery, help to manage your contract agreements and carry out any large project installations. Service delivery is a complex process to be involved in with many moving parts, so you need a field service software that is capable of handling all those parts of your business in one complete system.

That's why we believe that even though some CRM and ERP systems have some field service capabilities, you should look towards a full field service software that can handle all aspects of your service delivery, and then integrate with systems that will enhance your software's ability to perform.

Integrating two systems can come with risk, but with Fieldpoint's integration, we take that risk away with our out-of-the-box integration with NetSuite that comes built into the core product. Fieldpoint has removed the burden off you to have two systems communicate and delivered an integration to your accounting system. If your business is field service, starting anywhere else but with a field service software is like swimming upstream, and major ERP systems will require many additional applications to achieve what Fieldpoint is designed to do.

CHAPTER 2: COMPREHENSIVE SERVICE SOLUTION MADE SIMPLE

Field service operations come in all shapes and sizes and require their own unique solution to fulfill their service delivery needs. With it also comes the need to seamlessly handle billing, inventory, and purchasing through their accounting software at an accelerated rate to meet the high demands of customers. It's the largest challenge of any field service organization to find the balance between the two systems, in what is a complex relationship of two very important systems to the organization. But it also needs to be simple, and take complex operations and make them more efficient, faster and easier.

Fieldpoint's integration with NetSuite is elegantly designed to handle the complexity of delivering top of the line service, while automating much of the process with as many simple solutions as possible. With the integration, you'll save time on data entry of your customers, employees, vendors and inventory. And you'll get a pair of systems that communicate with each other when looking to complete invoicing, purchasing, and creating payables for subcontractors.

MAPPING OF DATA

When using multiple systems, the largest challenge can be data migration and limiting how much duplicate data entry must be completed. Any time some form of data is re-entered, there is a potential for errors, which could prove costly when the incorrect information is written on a work order or an invoice. Both systems need to be connected with each other, reflecting the critical data that both are going to use in day to day operations.

With the integration between Fieldpoint and NetSuite, the flow of information is mapped out and the two systems communicate additions or changes with each other. From the very beginning, Fieldpoint's field service management software has the option of importing all the data and information from NetSuite, making it accessible in the field service software. With the out-of-the-box integration with NetSuite, the complex nature of data sharing is resolved with a simple solution designed by Fieldpoint to make it easy for you to share data and information between two systems.

Information now available includes:

- Customer profiles, including names, address, and contacts
- Vendor information for purchasing
- Product lines for all inventory items
- Stock locations for warehouse information
- Employee profiles for full-time technicians and subcontractors
- Additional contacts

All the profiles and data needed to complete actions, such as work order creation, requisition of inventory and scheduling technicians is made available in Fieldpoint through the integration, removing any need to manually input them into the system. That reduces errors, minimizes time needed to create work orders, and ensures the information is accurate on all ends for service delivery and billing.

COMPLEX CUSTOMER INVOICING

The power behind the NetSuite and Fieldpoint integration is the ability for the sales order in NetSuite to work alongside the work order in Fieldpoint. Items placed on the sales order in NetSuite can be turned into work orders, while items used in Fieldpoint on the work order are placed as line items on the NetSuite sales order.

With billing being a complex procedure that demands accuracy, that accuracy can be lost when computing invoices as errors can occur when reading a work order, calculations can be wrong or items missed, creating an incomplete invoice for the customer.

When integrating two systems, you want to avoid part number errors, inaccurate descriptions, and wrong costs and tax calculations. With Fieldpoint's integration, we have eliminated those possible errors by posting all your parts and labor directly to the NetSuite sales order. Those items are confirmed using NetSuite's data to ensure perfect customer invoices.

The integration automates the invoicing process, and depending on the amount of review your service department and accountants require for outgoing invoices, it is possible to have invoices sent to the customer instantly as soon as the technician in the field collects an electronic signature and closes the work order.

While that level of speed may not be a fit for everyone, it's one of the many workable solutions field service organizations will have with the NetSuite and Fieldpoint integration. It takes the complex nature of invoicing and makes it easier for both the service department and accounting department, allowing both to live in their own system that specifically designed to handle either the field service or accounting aspects of the organization.

INVENTORY AND PURCHASING

Having an accurate number of parts and equipment on hand is imperative to field service organizations who want to perform timely service. Seeing how much of each item is in inventory is an issue service managers' deal with daily, as when they schedule service and need to attach parts to the work order, they need to have an accurate account of how many parts are in warehouses or technician's trucks so they can schedule timely service.

With a push of a button, technicians can check inventory levels in their truck or in warehouse locations. This is a direct view into NetSuite and real-time inventory levels. The technician can select the part for their service call and the part is then automatically attached to the NetSuite sales order. The inventory number for the location the part is selected from is also automatically updated to show real-time, updated part balances.

If no part is in inventory, the technician can initiate the request for the purchase of the part through normal sales order to purchase order processes. Once the part arrives, the technician is notified and the work order is rescheduled and the technician dispatched to complete the call.

All of this process is completed without having to enter data or information in either system, as automation and the integration take care of the subtraction of the parts from inventory in NetSuite, when consumed in Fieldpoint.

CHAPTER 3: WORK ORDER AND SALES ORDER RELATIONSHIP

The Fieldpoint and NetSuite integration builds a relationship between the work order and sales order. This allows field service organizations the option to initiate the service delivery process from either inside NetSuite or from within Fieldpoint, and have the adjoining sales order and work order created, depending on the service that is being performed.

When selling parts, materials and service contracts, have those easily turned into Fieldpoint work orders and contracts, or for larger installations, turn them into Fieldpoint projects, with a push of a button. Easily convert sales into service, as the sold materials and parts become part of the Fieldpoint work orders.

If your service department is responsible for the start of the process by creating work orders, then the integration will handle the creation of the sales order in NetSuite. Service administrators will create the work order, or have it automatically created from a scheduled contract, such as a preventative maintenance plan or service level agreement, adding any parts and equipment needed to complete the service call. An adjoining sales order will be created in NetSuite, with each line item from the work order, such as parts, time and labor and expenses, added as they are consumed or entered on the work order.

With the integration, you can start from either the sales order or work order and create the other, without the need to duplicate any of the information, such as customer profiles, parts selected from inventory, or time inserted for labor. It all seamlessly exchanges with the other system to create a mapped-out work flow for faster service delivery and invoicing, no matter what system you are initiating the process in.

Fieldpoint's integration with NetSuite meets the demand of a full accuracy when creating invoices. With the integration, you can be ensured that:

- Work orders and sales orders are accurate with full detail costs of service and parts
- Accurate costs and time information from technician or subcontractor is properly calculated from mobile apps in the field and added as a line item on the sales order
- Invoices are delivered to customers fast, with full transparency and accuracy into the charges

CHAPTER 4: INTEGRATION TOOLS

Fieldpoint has developed its own API called the Fieldpoint Data Transfer Service to do specialized integration to financial systems. It's a straight line between two software systems, as Fieldpoint's open, published API and Data Transfer Service connects with NetSuite's published API, SuiteScript, to form the entire integration.

By using our own technology, we are able to provide the features, quality, and ongoing support required to maintain the best integration to NetSuite. We focus just on Fieldpoint's and NetSuite's product development and update cycle, and we can take full advantage of both products API tools. We utilize Fieldpoint's and NetSuite's integration features like workflow, scripting, mapping, and end point services to monitor and log all data movement. Specialized forms were created in NetSuite to support the links between NetSuite sales orders and Fieldpoint work orders, projects, and contracts to make the user experience between systems as seamless as possible.

This increases the speed at which data and information is transferred between the two systems, such as when customer profiles, employee records and parts and inventory information are entered in NetSuite and made available immediately in Fieldpoint to use when creating work orders, contracts and projects. With the open API in both systems, it allows for any type of workflow to be seamlessly created, with push of the button abilities, and approval processes.

Keep your standard workflow processes in both Fieldpoint and NetSuite for generating work orders, sales orders and invoices, and allow your service department and accounting department to live within their own system, without having to login to additional software. With a push of a button, NetSuite users can see work orders in Fieldpoint within NetSuite, while in Fieldpoint, service managers can see the status of the sales order in the Fieldpoint work order management system, as well as see the sales order.

This style of integration allows for needs-based designing, giving your organization the tools, processes and workflow that is needed to meet your demands. Visibility is granted across the entire organization, but everyone is staying in the system that is best suited for their specific needs.

CHAPTER 5: CONTRACTS

For service contracts, such as preventative maintenance agreements, Fieldpoint's contract module automates much of the process with automatic work order creation. Work orders are created and are ready to be assigned to technicians using scheduling tools, ensuring no service call is missed, with all the parts needed to complete the repair and checklists for any inspection or compliance reports attached to the work order.

However, that isn't the only automation taking place, as with the creation of the work order from the service contract, so too is the sales order in NetSuite created, which will include any parts being consumed, labor time needing to be paid for, and additional expenses inputted by the technician or subcontractor in the field.

It's multiple levels of automation that doesn't just make sure no maintenance call is missed, but also one that ensures complete accuracy in the billing for the recurring maintenance in a fast manner. This will improve your cash flow with faster billing practices, while also improving customer service levels with a maintenance agreement that is planned to avoid downtimes in equipment.

CHAPTER 6: PROJECTS

Fieldpoint's project module comes with a full host of functionality for your service department to use for large installations. And while NetSuite has job costing project tools, Fieldpoint job costing is completed integrated to Fieldpoint's work order management system, so you can utilize the same pools of resources to do both break and fix work, and large installation projects. The integration between Fieldpoint and NetSuite allows the field service team to utilize all the powerful functionality of the project module, while providing NetSuite users the visibility to see into Fieldpoint project system, use the NetSuite billing, inventory, and purchasing systems.

For starters, project job costing can be completed in Fieldpoint, giving your service teams an estimated break-down of how much time a project will take, what the project will generate in revenue, how much will be spent on parts, and how to allocate those parts and materials to the tasks needed to complete the project. Fieldpoint places a huge importance on the job costing function in our field service software, and firmly believe service projects belong in the field service system. After the project is fully costed and ready to start production, field service managers will need access to the rest of the field service platform to:

- Schedule their technicians and subcontractors for the individual tasks that make up the project
- Allocate parts to the various tasks
- Send information to mobile apps for technician to use
- Gain full reporting tools to ensure the project is staying on time and on budget

Meanwhile, NetSuite users can have workflow created where their general ledger is impacted by the progress of the project, and journal entries can be completed automatically when milestone billing, which is set up in Fieldpoint, is ready to begin. This automates the invoice process so that the project stays on budget and the cash flow is solid through the life of the project.

Projects are another example of field service work being kept to the field service software and offering your service teams a powerful tool to complete any installations, while not limiting the visibility and input from your accounting department when it comes to job costing.

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NETSUITE

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OUR STORY

Fieldpoint Service Applications is a developer of field service software and project job costing applications. 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.