

# Introducing Field Service Manager for Creatio

## A Unified Platform Built for End-to-End Job Completion



Your Creatio system now has a solution to manage field service operations effectively. Field Service Manager helps you stay in control of everyday service work by keeping jobs, field engineers, and execution aligned as work moves forward.

It makes it easier to assign work, track progress on the ground, manage materials and time, and close jobs smoothly—so your teams stay coordinated and every job is completed on time with the right details captured for follow-up, billing, and reporting.



**Keep Field Work  
on Track**



**Simplify Day-to-Day  
Coordination**

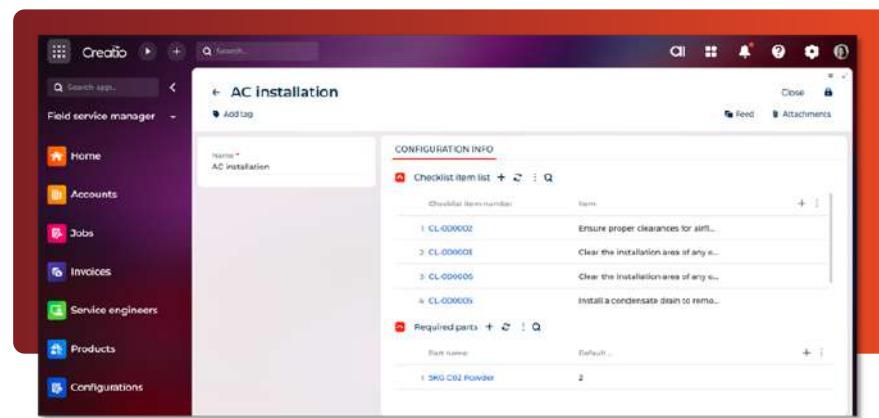


**Complete Jobs with  
Confidence**

# Key Highlights

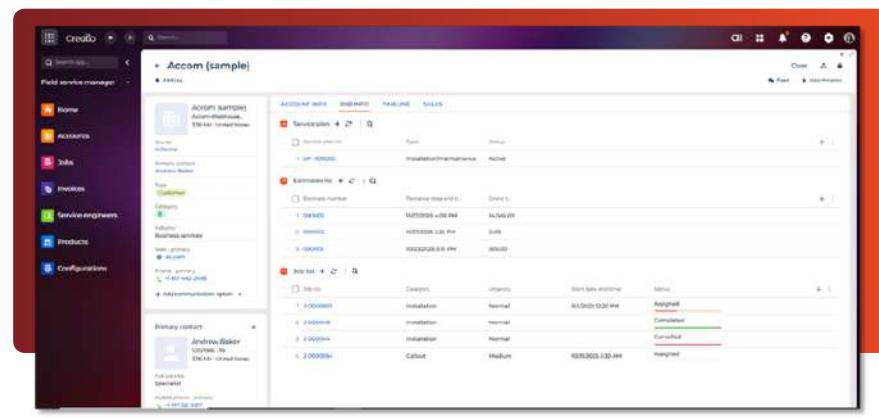
## Create Job Types with Ease

This view allows you to define and structure different service job types by setting clear job details, required parts, and checklist items in one place. By standardizing how each job type is configured, you can ensure consistent service execution, reduce manual setup for every new job, and make sure field engineers have the right information before work begins.



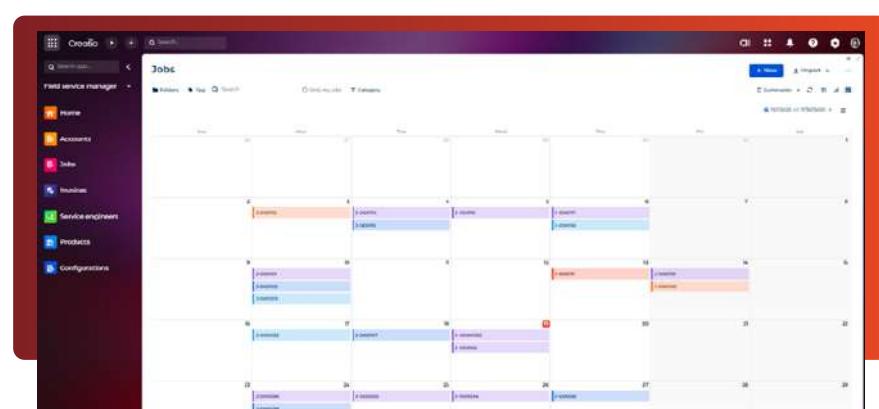
## Job Information at a Single Glance

Instead of checking multiple service records, this view brings everything together at the account level, allowing you to review service plans, estimates, and jobs in one connected view. It supports faster decision-making and more effective coordination across service activities.



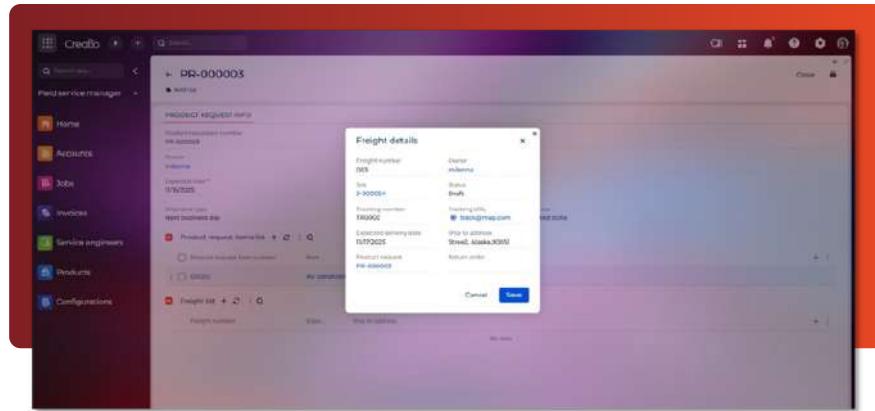
## Calendar-Based Scheduling

The Calendar tab allows you to view all active service jobs by planned date, giving you a clear visual of upcoming work and workloads. With drag-and-drop rescheduling, you can quickly adjust job dates directly from the calendar, making it easier to respond to changes and keep schedules on track.



## Freight & Delivery Tracking

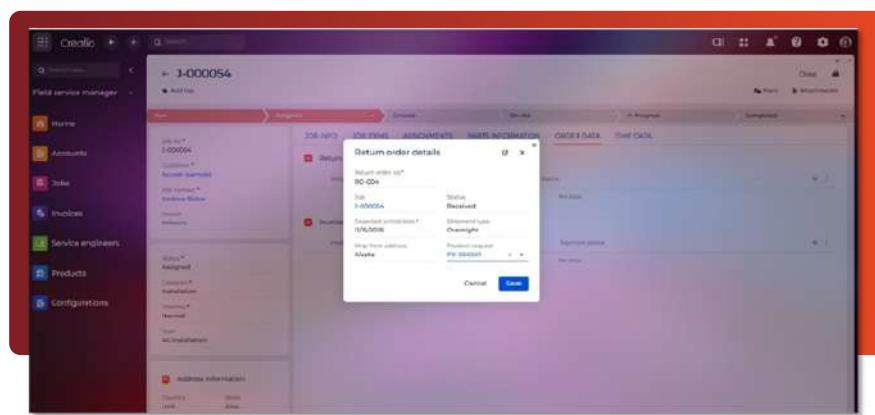
This view allows you to track how requested parts are shipped to the required location, giving clear visibility into delivery timelines and shipment status. By linking freight details to jobs and product requests, you can ensure parts arrive on time and reduce service delays.



## Return Order Management

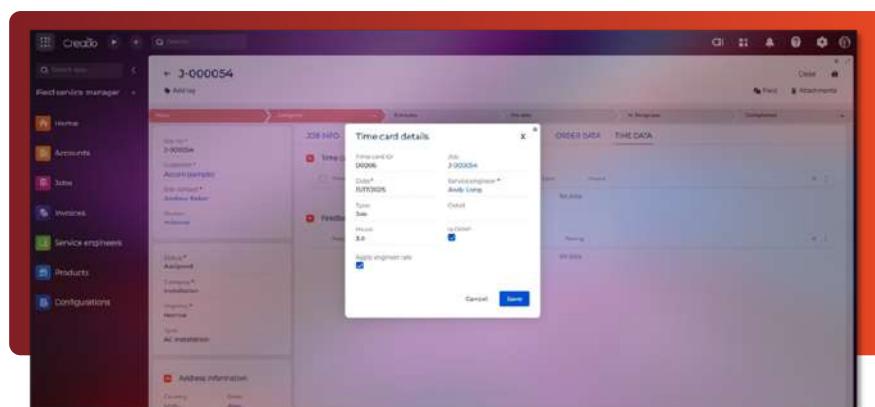
When parts need to be sent back, this view helps you track return orders linked to service jobs, ensuring unused or incorrect items are properly accounted for.

It supports better inventory control and reduces material wastage while keeping service and logistics processes in sync.



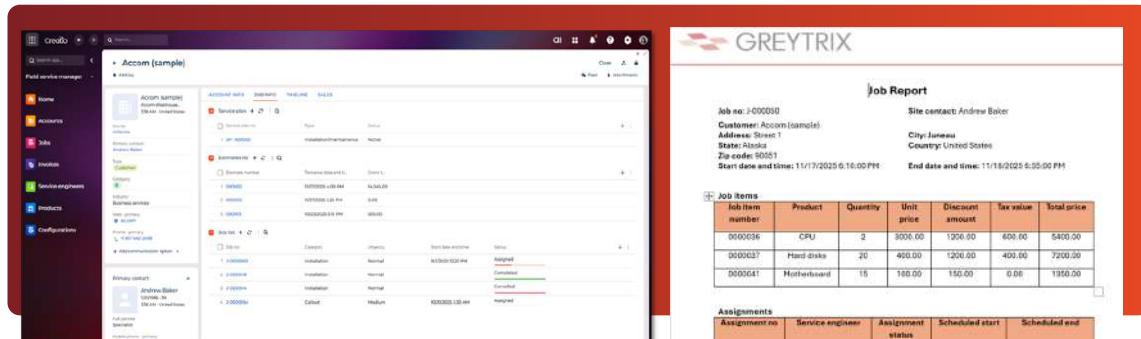
## Time & Work Tracking

For every service job, this view allows you to record the time and activities carried out by field engineers, giving clear visibility into actual effort spent. This helps support accurate job costing, billing, and performance evaluation—without relying on manual follow-ups.



## Job Reporting

This view consolidates key job information into a single format, allowing you to review and monitor multiple service jobs at once. It helps surface pending work and open items quickly, supporting faster analysis and informed operational decisions.



Job item number	Product	Quantity	Unit price	Discount amount	Tax value	Total price
0000036	CPU	2	3000.00	1200.00	400.00	5400.00
0000037	Hard disk	20	400.00	1200.00	400.00	7200.00
0000041	Motherboard	15	100.00	150.00	0.00	1350.00

## Job Management, Simplified at Every Stage

Plan → Assign → Execute → Track → Close

*With structure across every stage of execution, Field Service Manager turns everyday field activity into reliable job completion—helping teams reduce operational friction, complete jobs on time, and improve billing accuracy and service performance.*

### About Greytrix

#### 25 Years of ERP Excellence

Trusted by **5000+ businesses across the globe**, Greytrix specializes in cloud integrations that simplify complex operations.

Our GUMU™ framework powers seamless connectivity between leading **CRMs and ERPs — from Salesforce to Sage 100**.

With 25 years of expertise and **30+ certified consultants**, we help businesses **work smarter, integrate faster, & grow stronger**.



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