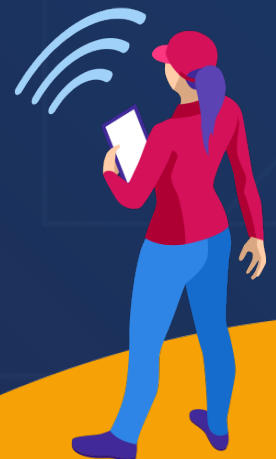


FieldConnect

ERP modernization blueprint for field service teams

Modernize your ERP, boost field performance, and avoid the pain of a full replacement.



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Introduction

Many field service companies are still running on legacy ERP systems. And while those systems may still manage the back office just fine, they were never designed for today's mobile, fast-moving workforce.

But replacing a legacy ERP is expensive, risky, and often more disruptive than it's worth.

The good news? You don't have to start over.

This guide walks you through how to **modernize your ERP**—not by ripping it out, but by **extending it**. With the right tools and integration approach, you can unlock modern field workflows, real-time data syncing, and major gains in productivity and visibility—**without overhauling your core system**.

What this guide covers

- How to tell when your ERP is holding your team back
- Whether you need to replace or extend your system
- The mobile tools and workflows that make the biggest impact
- How to integrate modern field service tech with your ERP
- Real-world examples, before-and-after results, and ROI benchmarks

Is your ERP holding you back?

Spot the hidden inefficiencies slowing down your field teams—and your business.

Is your ERP holding you back?



Common signs your ERP is holding you back:

1. Paper-based workflows
2. Manual dispatching
3. Slow invoice turnaround
4. Scattered job data
5. Duplicate office entry
6. No customer updates



6 signs your ERP needs a boost:

1. Paper or spreadsheets
2. Duplicate data entry
3. Delayed invoicing
4. No live status
5. Email-based scheduling
6. Manual inventory tracking

Your ERP may still work fine for the office. But out in the field? That's where most legacy systems fall short.

If your team is still relying on manual entry, disconnected apps, or delayed data, chances are your ERP is causing more problems than it's solving—especially for field operations.

Common red flags

- Techs are filling out paper forms or emailing photos back to the office
- Dispatchers are juggling schedules manually
- Invoices take days—or even weeks—to get out the door
- Job data is delayed, inaccurate, or scattered across multiple systems
- Office teams re-enter the same info from handwritten work orders
- Customers don't get real-time updates on job status

Each of these signs points to the same root issue: your ERP isn't built for the field. And when field teams are stuck working around it instead of working with it, everyone loses time—and you lose money.

Quick self-check: 6 signs your ERP needs a boost

1. Field techs rely on paper-based forms or offline spreadsheets
2. Your team re-enters job data more than once

3. It takes more than 2-3 days to send an invoice
4. You can't access live job status from your ERP dashboard
5. Your scheduling or dispatch process still runs through email or spreadsheets
6. You're managing inventory manually or reactively

If any of these feel familiar, it's time to consider how an ERP extension could save your team hours each week and drive faster revenue.

Extend vs. replace — Making the right call

Why you don't need to rip out your ERP
to modernize your operations.



Extend vs. replace – Making the right call



Extend your ERP when:

1. Back office runs fine
2. No need to retrain
3. Missing mobile tools
4. Need to scale fast
5. Want fast ROI

When your ERP starts showing its age, the obvious solution might seem like a full replacement. But that's a massive lift: it's expensive, time-consuming, and comes with the risk of business disruption.

The smarter move for many service companies? **Extend what you have.**

By adding purpose-built field tools that plug directly into your ERP, you unlock the capabilities you need—without giving up the system your finance team relies on.

When extension makes sense

- Your back-office processes still run fine in your ERP
- You don't want to retrain your entire staff on a new system
- You're missing field mobility, real-time data, or automation
- You need to scale operations faster than your ERP can support
- You want ROI quickly without a 6- to 12-month overhaul project



Replace your ERP when:

1. Finance needs unmet
2. Major performance issues
3. No modern integrations
4. End-of-life system

When you might need to replace

- Your ERP no longer meets finance or accounting requirements
- You're experiencing major performance issues
- You can't integrate with anything modern or cloud-based
- Your ERP is end-of-life and no longer supported

Comparison: Extend vs. replace

CONSIDERATION	EXTEND WITH FIELD TOOLS	REPLACE ERP SYSTEM
COST	Low to moderate investment	High capital expense
TIME TO VALUE	Weeks	6-12 months
RISK	Low disruption	High disruption to ops
TEAM DISRUPTION	Minimal training, no process loss	Full process and team overhaul
ROI TIMELINE	Fast (30-90 days)	Slow (6-12 months)
FLEXIBILITY	Modular and scalable	All-in, fixed roadmap

In short: **extending your ERP buys you time, performance, and flexibility.**

And for most field service businesses, that's exactly what's needed to modernize operations—without creating chaos.

Mobile field tools that change the game

Give your technicians the tools they
need—where they actually work.

Mobile field tools that change the game



With mobile tools, you can:

1. View work orders anywhere
2. Log parts and track photos
3. Clock in/out from the field
4. Add notes in real time
5. Sync jobs instantly

Outdated ERPs weren't built for today's mobile workforce—and that's where the biggest bottlenecks show up.

Field technicians are your front line. If they're stuck with paper, disconnected apps, or having to "call the office" for basic info, your business loses speed, visibility, and revenue.

The difference mobile makes

With modern tools that connect directly to your ERP, techs can:

- View and update work orders from any device
- Track parts used, capture photos, and collect signatures
- Clock in and out in the field
- Add notes and job details in real time
- Submit completed jobs that instantly sync to your ERP

No delays. No paperwork. No re-entry.

Why this matters

Every time your techs complete a job and update it on the spot, your office gets instant data. That means:

- Faster invoicing
- Fewer errors
- Real-time status for your entire team
- Better service for your customers

Mobile workflows don't just help the field. They make your whole business run smoother.

Real-time data & syncing — The missing link

Eliminate delays and data silos with field-to-ERP
syncing that just works.

Real-time data & syncing – The missing link

“With FieldConnect, we’ve increased service volume without adding headcount—our team is more efficient, and we’ve been able to repurpose staff to higher-value work.”

Chad Cillessen, CIO, C&C Group



Without real-time data, field service becomes a guessing game.

When updates lag behind or get lost in the shuffle, you deal with:

- Delayed billing
- Duplicate entries
- Inaccurate inventory
- Limited visibility into field activity

These small delays add up—costing time, money, and customer satisfaction.

What real-time syncing solves

When your ERP and field tools talk to each other instantly, you get:

- Live job updates in the office
- Faster invoicing cycles
- Instant updates to work orders, time logs, parts used, and notes
- A single source of truth for every job

Instead of chasing down info, your team can act on it—right away.

Real example: C&C Group

After implementing FieldConnect, [C&C Group](#) cut invoice turnaround time in half. Technicians completed jobs and submitted details directly from the field, giving the office everything needed to bill by the end of the day.

That’s the impact of real-time sync between the field and back office.

Integration strategies that don't break your ERP

Add new capabilities without disrupting
your current ERP environment.

Integration strategies that don't break your ERP



Seamless integration means:

1. Direct ERP data flow
2. Automated time & job sync
3. Real-time dashboards
4. One system workflow

One of the biggest fears around modernization is breaking what's already working.

But integrating modern field service tools doesn't mean rebuilding your ERP from scratch. The right solution plugs into what you have—no rip and replace required.

What seamless integration looks like

- Secure, direct data flow between field app and ERP
- Automated syncing for time, parts, job updates, and signatures
- Real-time dashboards that reflect job status and field activity
- No need to bounce between systems or double-enter data



Integration best practices:

1. Use clean API syncs
2. Prioritize key workflows
3. Train a core rollout team
4. Launch in phases

Common ERPs FieldConnect integrates with:

- Sage 300 CRE
- Microsoft Dynamics GP & SL
- Viewpoint Vista
- Spectrum
- And others

If your ERP runs the back office, an extension like FieldConnect runs the field—and the two work together without disruption.

Best practices

- Use APIs to maintain clean data syncs
- Start with high-impact workflows like time tracking and work orders

- Train core team members on mobile use and field-to-ERP updates
- Roll out in phases if needed

You don't need a whole new ERP to modernize field operations—you just need to connect the missing piece.

Real-world case studies & benchmarks

See what modernization looks like in the field—
and the results it delivers.

Real-world case studies & benchmarks

"FieldConnect streamlined our operations by eliminating paper work orders, minimizing administrative tasks & data entry, and reducing service to billing time."

Bill Craft, Senior VP of Service
James CRAFT & Son Inc.



You don't have to take our word for it. Here's what ERP modernization looks like in action.

Case study: James CRAFT & Son

ERP: Viewpoint Vista

Challenge: Paper-based work orders, delayed approvals, and manual data entry slowed down their operations.

Solution: Integrated FieldConnect to digitize the work order process, enabling real-time data capture, mobile access, and improved back-office visibility.

Results:

- Streamlined field operations with mobile access to job data
- Eliminated duplicate data entry and sped up invoicing
- Gained visibility into technician status, job progress, and service contracts

"We've gone from paper work orders and job photos being handed in the next day—or even later—to having the information in our system as soon as the job is done."

— [James CRAFT & Son Case Study](#)



Modernization by the numbers:

1. Faster billing cycles
2. Higher tech utilization
3. Improved FTFR rates
4. Increased service revenue

Sample metrics to watch

Modernization isn't just about ease—it's about measurable results.

Companies that integrate field service software with their ERP often see:

- Billing time cut by 30–50%
- Technician utilization increased by 10–20%
- First-time fix rate (FTFR) improved by up to 15%
- Service revenue growth without adding headcount

Sample ROI calculation

Even small efficiency gains at scale make a big impact.

If your techs can complete just 1 extra job per day, and that job averages \$300 in revenue...

Multiply that across 10 techs = \$3,000/day, or over \$700,000/year in new revenue.

Modernizing isn't a cost—it's an investment with real returns.

[Check out our ROI calculator.](#)

Your ERP modernization blueprint — A 5-step plan

Follow a practical roadmap to upgrade your ERP's impact without starting over.



Your ERP modernization blueprint – A 5-step plan



Quick checklist:

1. Mobile work orders
2. Real-time job data
3. ERP integration
4. Reduced admin work
5. Faster billing
6. Happier customers

Ready to make your ERP work better for the field? Here's the plan:

Step 1: Assess

- Map out current field workflows and ERP limitations
- Talk to field and back-office teams about pain points

Step 2: Identify gaps

- Where are delays happening?
- What's still being done manually?

Step 3: Choose tools

- Look for field service software built for ERP integration
- Prioritize mobile capabilities and real-time syncing

Step 4: Integrate

- Start with the highest-impact workflows (e.g. work orders, time tracking)
- Roll out with a core team before expanding

Step 5: Measure

- Track KPIs like invoice turnaround time, revenue per tech, and job accuracy
- Use benchmarks to identify next improvement opportunities

Conclusion

You don't need to rip out your ERP to bring your field operations into the modern era. By extending your current system with the right mobile tools and real-time integrations, you get the benefits of faster invoicing, fewer delays, and a more connected team—without the disruption of a full replacement.

Field teams move fast. Your ERP should keep up.

Modernization isn't about starting over. It's about making what you already have work harder, smarter, and more in sync with how your business actually runs today.

If you're ready to take the next step, we're here to help. Let's make your ERP work better—where it matters most: in the field.

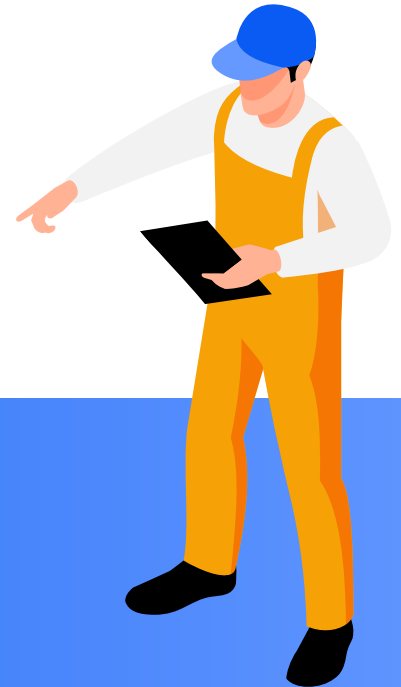
The Complete Mobile Field Service Solution

Hundreds of companies and thousands of people use FieldConnect's mobile-friendly platform for work order management, scheduling and dispatching, payments in the field, real-time job quotes, and much more.

And with seamless ERP integration, real-time analytics, and powerful mobile tools, FieldConnect empowers your team to work smarter, faster, and more efficiently—anytime, anywhere.

[BOOK A DEMO](#)

[Learn more](#)



Comprehensive solution by design.

Built by experts with over 20 years of experience, FieldConnect offers a full suite of features to unify your technicians, dispatchers, back-office and staff under one, fully customizable solution.

Trusted by industry leaders.

Join hundreds of companies and thousands of people using FieldConnect today.



Marie Geib, IT Project Manager,
The Tri-M Group



"Tri-M's migration to FieldConnect was seamless, and the team provided excellent support throughout the process."

Ready to get started?

Contact us @ fieldconnect.com Phone: 949-428-1540