

FIELD SERVICES
MODULE

DISCOVERY SOLUTIONS

INTRODUCTION



The Field Services Module supports Field Service and Equipment Repair businesses that operate in some of the worlds toughest industries. Discovery facilitates service operations by automating your business workflows from quote to invoice. If you are sending people or equipment to site, this module will help you schedule, execute, and gain insight into your profitability.

Service jobs typically include deploying specialized equipment, personnel, and consumable inventory to a job site. The Field Services Module supports the full range of operational complexity from equipment maintenance to major construction projects.

This module is trusted by industry leaders including **Roska** and **Primec Controls**.

Built to Connect

Discovery ERP speaks the language of modern systems. Our open Discovery APIs let your tools, data, and trading partners exchange information in real time—no brittle exports, no manual re-keying. And with native Model Context Protocol (MCP) support, your AI assistants can securely read and act on your business data the moment you need them to. The result is one connected platform where your software, your integrations, and your AI all work from the same source of truth.

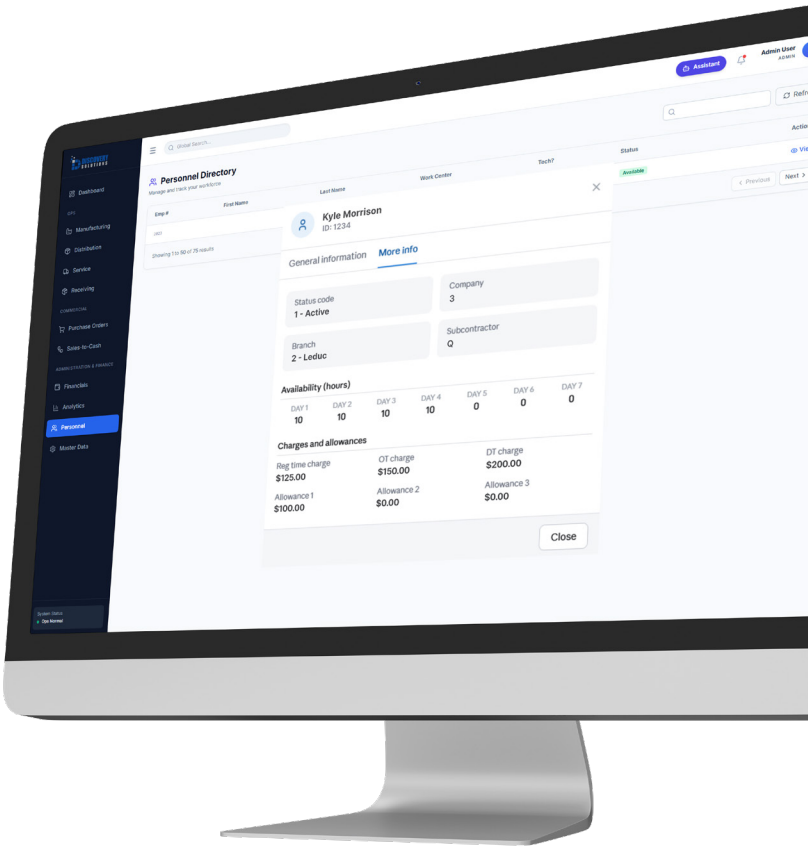
SERVICES AND JOB SCHEDULING



Discovery ERP's Field Services Module automates the job entry process and recording of field activities. Job entry can begin by quoting a job to a customer or scheduling a job when the customer calls.

Equipment and service personnel can then be scheduled, making their availability visible to all your operational staff. No need for whiteboards or independent project management software, as your job schedule will be managed digitally and fully integrated into Discovery ERP.

For Repairs and Maintenance businesses, the Field Services Module tracks the maintenance performed on your customer's equipment allowing you to better understand maintenance frequencies and job costing.



FIELD TICKETING AND JOB RECORDING



The Field Ticketing feature can be used by your field staff to record daily events and equipment usage. This allows you to eliminate paper recordings, improve your data quality, and billing accuracy. It also has integrated Service Order and Scheduling capabilities, including, but not limited to, the following:

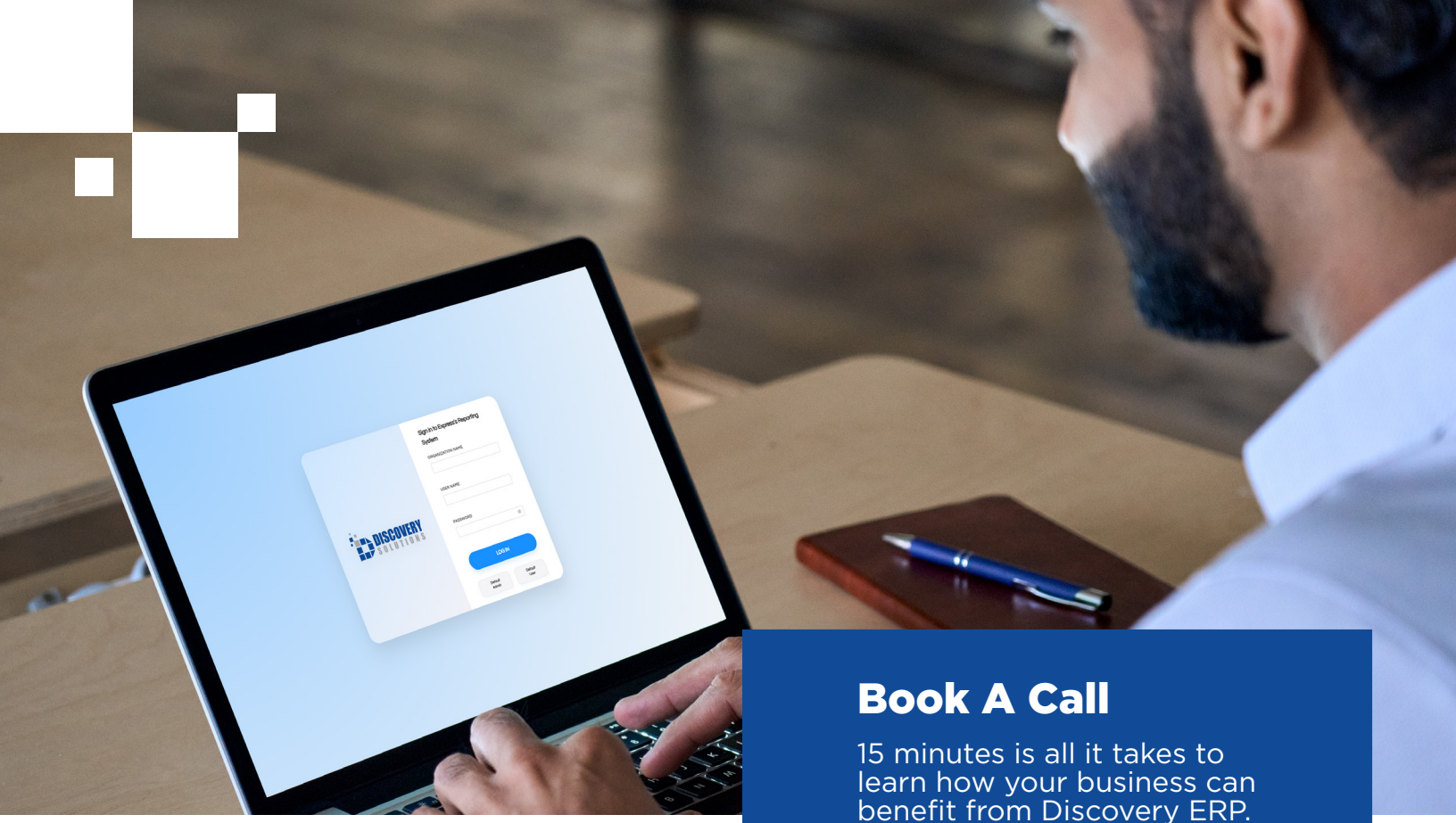
- Job entry specifications are automatically sent to your field service personnel
- It can be configured to track usage and time based on customers specifications
- Tickets can be printed at site or signed electronically improving invoicing speed
- Head office automatically receives a ticket for review and billing
- Payroll inputs and asset tracking are fed back into job costing
- Track costs against fixed-bid projects, time-and-materials work, or hybrid arrangements.

Management Information

The Field Services Module provides management personnel with daily ticket revenue, job costing by service, equipment, and customer. Additionally, you will have visibility into equipment utilization (number of days billing, days in maintenance and days idle) and transaction exceptions.

Integration

All of the Discovery ERP modules support multicompany, multi-branch, and multi-currency operations. The Field Services Module integrates with all of the other operational modules offered in the product, empowering you to make collective and informed business decisions.



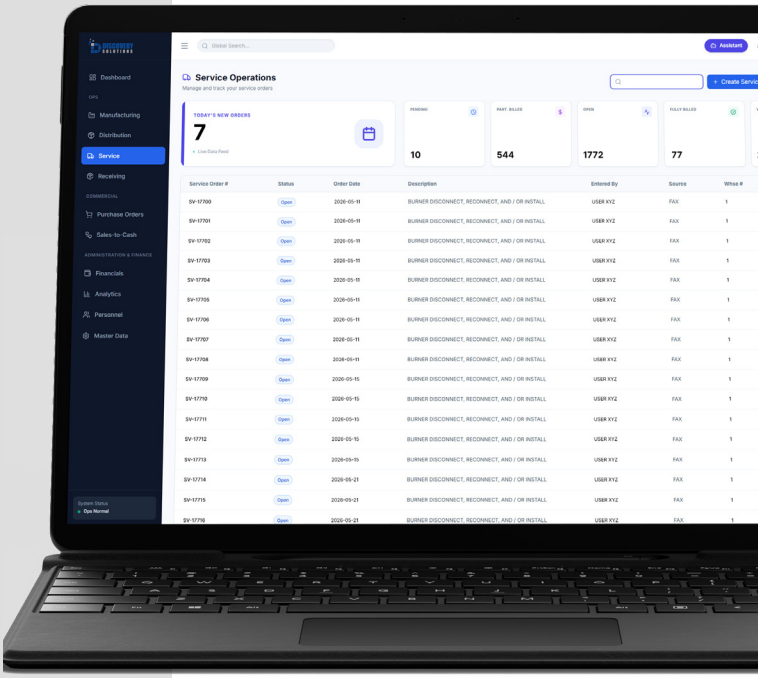
Book A Call

15 minutes is all it takes to learn how your business can benefit from Discovery ERP. **Visit our website** to schedule an introductory call today!

About Discovery Solutions

Discovery Solutions is a Calgary-based ERP software provider with 40+ years of experience. Our mission is to empower businesses operating within the hardest-working industries with the tools, expertise, and confidence to operate smarter and grow faster.

Our product, Discovery ERP, is engineered to tackle operational pain points through 5 interconnected modules; Manufacturing, Distribution, Field Services, Rentals, and Accounting. Unlike other “one-size-fits-all” ERP software, Discovery ERP is a product that is built around a clear understanding of how your business operates, the challenges it experiences, and the potential it possesses.



Choosing Discovery Solutions means more than just selecting an industry-specific software; it means gaining a partner dedicated to your success. We don’t just sell software, **we provide solutions to your operational pain points,** regardless of how simple or complex they may be. In doing so, we naturally pride ourselves on building long-standing relationships with clients – a fact that is proven through our clients who have trusted us for over four decades. From initial meetings to implementation and beyond, our in-house team stands shoulder-to-shoulder with you, offering personalized support, constant innovation, and a commitment to your company’s growth and expected success.