



INSIGHT BRIEF · FIELD SERVICE

From Call to Cash: One Record, No Re-Keying

What it means to run intake, dispatch, field work, and invoicing on a single record, and why every export between separate tools is somewhere numbers go to die.

In most service businesses, a call becomes a ticket, the ticket becomes a dispatch entry, the dispatch entry becomes a paper work order, and the work order becomes an invoice in a different system entirely. Four handoffs, four chances to drop something billable.

Call to cash on one record means the thing created at intake is the same thing billing invoices from. Everything in between is a status change, not a copy.

Where the chain usually breaks

- Intake to dispatch: details retyped, site notes lost
- Dispatch to field: paper work orders with no equipment history
- Field to office: parts and hours transcribed from memory or handwriting
- Office to invoice: billing waits for paperwork to arrive and be decoded

What one record changes

The work order carries everything: customer, site, equipment history, contract terms, assigned tech, parts, labour, photos, signature. Each step adds to the record instead of copying it.

- The dispatcher sees history at assignment, so the right parts roll
- The tech adds time and materials at the site, on a phone
- Billing sees a completed, priced work order the moment it closes
- Accounting sees the same numbers, because there is only one set

Same-day invoicing is a systems outcome

Companies do not invoice three weeks late because they enjoy the float. They invoice late because the information needed to bill is scattered and someone has to assemble it.

When the work order closes complete, priced, and signed, same-day invoicing stops being a policy push and becomes the default. The cash cycle shortens by weeks without anyone working harder.

The compounding benefit

Once every call flows through one record, you accumulate real service data: actual time by job type, actual parts by equipment model, actual margin by contract. That data is what makes the next pricing decision, the next service agreement, and the next hire a calculation instead of a guess.



Questions about any of this?

Summit Business Systems has been implementing ERP for Ontario businesses since 1991. We are an Acumatica Gold-Certified Partner based in Barrie, working with construction, field service, distribution, and professional services companies across the province. If you want a second opinion on anything in this insight brief, we give straight answers.

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