

# 10 Ways Field Service Companies Grow with Acumatica

## OPTIMIZE, STREAMLINE, AND MOBILIZE FIELD SERVICE OPERATIONS WITH ACUMATICA FOR INCREASED PROFITS

Access to real-time information is challenging without the right business platform. Ever-changing customer demands, complex scheduling, and connectivity issues stifle field service growth. Technicians struggle to provide prompt services due to information gaps, delays getting the right equipment or parts, and difficulties managing services. Complex contracts and disjointed workflows delay accounting wreaking havoc on working capital and profitability.

Modern Field Service ERP applications enable management to streamline business processes, reduce costs, and boost sales. Today's field service applications connect to modern technologies such as cloud computing, global positioning systems, electronic signatures, and more.

Acumatica is an end-to-end business management solution designed for progressive field service organizations. It supplies everything field service companies need to grow on a future-proof cloud business platform.

### GROW FIELD SERVICE WITH A FUTURE-PROOF ERP APPLICATION



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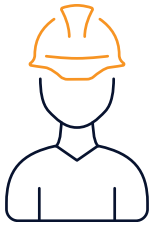
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## INTRODUCTION

# Drive Field Service Growth—The Acumatica Way

Field Service companies struggle with business technology. There are a few good options available to manage the business. Industry applications provide strong contract and field service management capabilities but do not provide insights into the data. Traditional legacy applications create data silos with disconnected processes between in-house back office and remote field operations. Systems are slow and challenging to support with ballooning costs for application and user licenses. General ERP systems lack specialized features to manage field service operations. They rely on costly third-party applications with poor integration to accounting and business management systems.

Acumatica is unlike any field service ERP application. The native cloud-based platform supplies everything field service companies need to manage their business anytime, anywhere, on any device. Consumption-based licensing makes Acumatica an affordable choice for smaller field service operations and a cost-effective option for larger field service businesses.

The complete field service business suite provides contract management, appointment scheduling, and route optimization. It also includes global positioning (GPS) navigation via the mobile app, inventory optimization, and equipment management with warranty and depot repair capabilities. Field service businesses drive growth with embedded customer relationship management (CRM) for field service sales quotes and customer support with case management. Customizable workflows allow Acumatica to adapt to complex business scenarios.

With Acumatica, field service companies capture expense receipts on mobile devices for instant visibility into project costs. Embedded document management provides access to equipment manuals, work instructions, and other critical information.

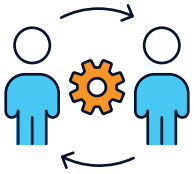
Acumatica's last-mile functionality includes recurring appointments, electronic signatures, route optimization, and employee skill and certification management. Field service businesses run their business with minimal customizations on a comprehensive, scalable, and future-proof platform.

Service-driven businesses, wholesale distributors, and manufacturers use Acumatica for deliveries, installation, or remote service operations.

“Acumatica definitely positions us for growth. The way we were doing things was outdated and it wasn't allowing us to operate in the most efficient and cost-effective manner. Acumatica better aligns with our growth path and ever-evolving business needs.”

- RANDY GIESEKING, PRESIDENT, SAFETY MANAGEMENT GROUP

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## 1. RESOURCE SCHEDULING

# Maximize Technician, Equipment, and Fleet Utilization

Inefficient scheduling affects profitability. Technicians must have the right equipment and inventory on their trucks to complete their work. Without route optimization, technicians waste time driving to customer locations, limiting the number of service calls they can complete each day. Acumatica's field service application maximizes schedules ensuring that technicians have what they need. The software perfects schedules, so technicians get to customer sites faster to complete more on-site jobs.

“Whenever we have jobs that come in in the middle of the day, we can just throw it onto our tech’s schedule. They can pull it up on the app. We don’t have to try to send them anything. They don’t have to come back here to get paperwork. It makes it a lot more streamlined. They can just stay out in the field and keep working.”

- CODY SHARP, MANAGER OF INSPECT AND TEST DEPARTMENT  
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### TECHNICIAN APPOINTMENTS

Scheduling technicians is difficult without the right business software. Technicians are always on the move, and planned service appointments often run over despite the best-laid plans. Schedule technicians based on workload, location, or by skill or certification. Ensure technicians have the right equipment and inventory to complete the job.

Acumatica's calendar board shows every technician and their assigned service orders. Manage technicians assigned to multi-day jobs and pause and restart billing for travel time or lunch breaks.

Management can adjust schedules on-the-fly and communicate with technicians from the office.

At the customer site, technicians start the job providing customer service and dispatch with access to real-time information from the field, including status and field notes.

### EQUIPMENT SCHEDULES

Acumatica provides one place to manage customer equipment. Create maintenance and service schedules for customer equipment with recurring appointments based on service level agreements or contracts. View equipment service history for a complete picture of past services and replacement parts. Identify equipment components including serial numbers, warranties, and available inventory.

### FLEET OPTIMIZATION

Maximize fleet usage with built-in GPS navigation via the field service mobile app to get to jobs faster. GPS provides step-by-step driving directions with integrated maps to avoid road closures and construction. Use Acumatica for services performed on company-owned vehicles to ensure they are running properly to minimize breakdowns.



## 2. INVENTORY PLANNING

# Optimize Service Parts Inventory

Field service ERP systems must have strong inventory management to minimize inventory carrying costs while reducing stock-out scenarios that delay customer service schedules.

Know what inventory you have in-house and on each vehicle. Leverage inventory replenishment, purchase orders, and requisitions with built-in vendor bidding to ensure you have what you need to complete each job on-time and on-budget.

Acumatica provides everything inventory and warehouse operations need to manage inventory. Track inventory by warehouse location. Identify inventory serial or lot detail. Transfer inventory between physical or mobile warehouse locations.

“My biggest challenge is the efficiency for my technicians. The inventory piece of Acumatica was certainly something that we were very much interested in. My guys are on call 24/7 365 days and they need to have the right parts at the right time so they can go to the client and do the necessary repairs.”

- JENNIFER HARLER, CHIEF OPERATING OFFICER, DP AIR CORP

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### INVENTORY REPLENISHMENT

Acumatica provides powerful replenishment to manage inventory based on usage with minimum or maximum stocking levels, safety stock, and vendor lead times. Run replenishment reports to know what items to buy, when to buy them, and how much to order to avoid stock-out situations or costly rush orders. Minimize inventory carrying costs and increase turns by stocking just what you need.

### WAREHOUSE MANAGEMENT

The Acumatica Warehouse Management module automates inventory receipt and put-away transactions using barcodes and mobile scanners or phones. Warehouse employees can transfer inventory between locations or pick inventory for service orders using scanners to speed up processes minimizing manual data entry errors.

### PURCHASE ORDERS

Reduce costs and improve vendor relationships with Acumatica Purchase Orders. Trigger Purchase Order creation automatically with powerful replenishment settings. Quickly create manual purchase orders or generate a release from a pre-defined blanket order. Drop-ship inventory and equipment directly to customer locations.

### REQUISITION MANAGEMENT

Acumatica Requisition Management streamlines the most complex purchasing processes. Create requisitions for inventory required for service orders or customer quotes. Route requisitions internally for approvals and send requisitions electronically to vendors for bidding. Approved requisitions are converted to purchase orders.



### 3. ROUTE OPTIMIZATION

## Get to Jobs Faster with Optimized Routes

Route optimization is complicated. Appointment schedules can change, and high priority jobs impact existing schedules. Finally, road construction sends technicians out of their way, creating delays getting from one job site to another. Today's field service managers must have smart solutions to optimize routes to improve profitability. Acumatica provides powerful route optimization through a partnership with its sister company WorkWave. WorkWave is the leader in cloud-based fleet management solutions for today's mobile workforce.

Hear customer stories on how their businesses depend on Acumatica Field Service Applications for their success.

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#### **ROUTE OPTIMIZATION**

WorkWave Routing Engine (WWRE) increases operational efficiency by intelligently routing technicians for appointments or routing vehicles for pickups and deliveries.

WWRE takes complex sets of jobs and orders and schedules the tasks while respecting constraints and goals. The algorithm maximizes fulfillment at the lowest total operational cost.

The easy-to-use, robust API-based solution is integrated with Acumatica and ready to go with license packs available to schedule your technicians optimally.

#### **GPS AND MAP INTEGRATION**

Plot routes in Google Maps for each service person with lists of required resources (equipment or inventory). Real-time GPS location status is connected to Acumatica from the mobile app allowing dispatchers to see where technicians are located in real-time.

#### **REDUCE FLEET COSTS**

Minimize wear-and-tear on vehicles with optimized route management to reduce mileage. Use service management for unplanned vehicle maintenance and preventative maintenance.

“[Acumatica] is a very intuitive software. I find it very easy to use. Navigating in and out of different modules—all the things you would expect from a high-end software.”

- REBECCA OGLE, CHIEF FINANCIAL OFFICER  
SAFETY MANAGEMENT GROUP

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## 4. WARRANTY TRACKING

# Simplify Warranty Management for Parts and Service

Managing warranties for parts and service is difficult without the right system. You need to know what equipment is installed with details on warranties for each component. Warranties cover the original equipment, replacement parts, and installation services.

Acumatica's field service application tracks warranties for equipment and machinery by serial number with details for the original equipment and replacement parts manufacturer.

“I've implemented a tremendous number of systems across my career. None of them have been as smooth as this implementation with Acumatica . . . We've rolled out six offices. Our last Minneapolis office is going live at the end of this month. Not only have we rolled out those six offices within the first year—we've done our largest office in implementing our Chicago office on Acumatica in the midst of the COVID-19 pandemic working remotely, not being on-site, and being able to implement that in this time is a testament to the way that this can be done.

- BRYAN MULLEN SVP, SHARED SERVICES, LIFEWAY MOBILITY

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### ORIGINAL EQUIPMENT

Capture manufacturer warranties for machinery or equipment installed at customer locations. Use embedded document management to store warranty information with the asset record. Set dates for warranty effective and retirements dates. Use workflows and alerts to notify management when warranties are due to expire.

### REPLACEMENT PARTS

Define warranty details for replacement parts during receipt of goods or when the parts are installed on customer equipment. Record the installation date, serial numbers, and installation notes, photos, or other attachments.

### SERVICE WARRANTIES

Establish warranties for installation services. Set up contracts for free or paid warranties. Warranties can be applied to specific services or parts by location. Manage renewals with complete visibility into contract history and changes.

### SERVICE CONTRACTS

Manage service contracts and billing for warranty work. Service contracts define the service schedule, start date, next execution date, and expiration date. Service contracts generate service orders based on the contract with flexible frequencies and forecasted service dates.



## 5. PROJECT INTEGRATION

# Integrate Service Management with Projects

Manage services related to larger projects. Acumatica integrates field service with project accounting to manage the complexities of larger projects with field services. Create projects, define tasks, and record activities linked to field service orders to consolidate field service costs and expenses against the project.

“I’m able to take look at where the projects stand, look at projects that are on our horizon in the next two, three, four weeks—so that we can gather materials, assign project managers, and really just streamline our entire process”

- PHILLIP CORDELL, VP OF TECHNICAL OPERATIONS,  
M3 TECHNOLOGY GROUP

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### PROJECT ACCOUNTING

Create and track multi-phase projects from scratch, from templates, or quotes. Create service orders from project tasks or link service orders from the project to account for the time and expenses incurred for the service orders. Define costs by employee, labor item, project, project task, and the rate type.

Schedule project resources including staff and technicians. Simplify time entry and improve visibility. Compare project costs with original and revised budgets and forecasts by period using real-time reports. Use configurable workflows to manage project change orders and approvals.

### TIME & EXPENSE MANAGEMENT

Use Android or Apple devices to capture time entry with manager approvals. Scan expense receipts back to the project with artificial intelligence to decipher vendors, amounts, dates, and categories.

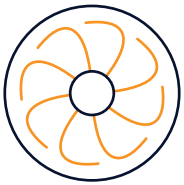
### ADVANCED BILLING

Invoice according to project and contract requirements—fixed price set in advance or cost-plus where the invoice amount is not known until costs and fees are incurred. Cost-based projects can be capped. Establish variable rates by project or by resource with mark-up by customer or service type.

“Acumatica positions us for growth and lets us establish our own workflows to keep up with our needs. We have ultimate flexibility to make sure our ERP works the way we need it to, not stuck with what used to work.”

- CHARLES HUTCHINSON, CFO, INTRACOASTAL ENVIRONMENTAL

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## 6. EQUIPMENT MANAGEMENT

# Manage Company-Owned and Customer Equipment

Equipment management is essential for service-driven organizations. Field Service organizations manage company-owned equipment, including vehicles and equipment used to perform service work orders. They also manage customer-owned equipment by location.

Acumatica provides robust equipment management for internal and customer-owned equipment with flexible workflows and user-defined fields to configure the system to manage virtually any field service requirement.

“Now we have 25 Field Services Reps, five operating as full-time onsite support technicians at universities and corporate campuses. In 2017 we logged 1,300 service tickets, 2018 was double that at least. We use Acumatica’s case system and Field Services to track tickets.”

- KELLY BURNS, ERP DEVELOPER & FORMER COO  
M3 TECHNOLOGY GROUP

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### VEHICLES

Manage your fleet with Acumatica. Identify vehicles by VIN, make, model, and year. Purchase information includes the vendor and purchase type—leased, rented, or owned. Track preventative and repair services for fleet maintenance and manage warranties for parts and labor. Attach the owner’s manual and documents to keep everything together in one place.

### TARGET EQUIPMENT

Define target equipment for services. Target equipment may include any equipment sold to a customer or serviced by your organization. Manage internal asset numbers, barcode labels, and a bill of materials for components with serial numbers and individual warranties for parts and labor on customer-owned target equipment.

### RESOURCE EQUIPMENT

Manage internal equipment needed for field service operations. Vendor, serial number, and equipment type help define resource equipment. Assign resource equipment to vehicles and technicians and maintain resources using service management to repair or calibrate the equipment.

### FIXED ASSET DEPRECIATION

Acumatica includes a powerful fixed asset module to depreciate company-owned equipment. Manage depreciation using different schedules. Track the original purchase cost, salvage amount, and replacement cost. Identify the asset location by branch, building, floor, or room. You can also assign maintenance to a custodian or service technician.





## 7. CUSTOMER EXPERIENCE

# Exceed Expectations with Best-In-Class Services

Customers demand excellent field service and back-office customer service. Differentiate from competitors with Acumatica's customer portal, embedded customer support, automated communications, and flexible service management application.

“One of the things that we do is we measure customer satisfaction through TrustPilot and . . . the rate with which we are getting five-star ratings is really improving. Our ability to communicate with our customers in a consistent format and with consistent messaging is improved because we're doing so through Acumatica and sending consistent messages on appointments or work order confirmations, those types of things.”

- BRYAN MULLEN, SVP SHARED SERVICES, LIFEWAY MOBILITY

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### **SELF-SERVICE PORTAL**

The Acumatica customer portal provides online access to customer account information. Customers can review invoices, request quotes, and download invoices, statements, or other documents. It is possible to expose service-related information to customers online through the customer portal.

### **CUSTOMER SUPPORT**

Acumatica CRM provides case management for service-driven organizations. Support tickets can be created online by the customer or internally by support representatives. The support system provides ample flexibility for assignment, management, and billing for customer support with an online knowledgebase available to customers.

### **AUTOMATED COMMUNICATIONS**

Acumatica automates every facet of your field service business, including customer communications. Setup email notifications for warranty or service contract renewals. Automate document transmittal for invoices and statements.

### **SERVICE MANAGEMENT**

Acumatica empowers organizations to provide world-class services. Appointment optimization helps you get the right technicians to the customer site faster with the right equipment and parts. Mobility provides instant access to service history and equipment information to get the job done right the first time.



## 8. CONTRACTS & BILLING

# Manage Service Contracts with Automated Billing

Recurring service contracts are a significant source of revenue. Renewal date visibility for each contract helps preserve revenue. Dashboards and notifications alert the service team of expiring contracts. Create and manage multiple service schedules per customer and automate the billing process with invoices emailed directly to customers.

“Now that we use the service contract module all I do is just enter it in once . . . I set the recurring time that I want it to recur on and it just creates the service order, I can schedule straight to the appointment, the work order is already created, and as soon as the appointment’s done we can just invoice right out of it with minimal user interface. It makes it a lot easier.”

- CODY SHARP, MANAGER OF INSPECT AND TEST DEPARTMENT  
SECURITY SOLUTIONS NW

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### CONTRACT MANAGEMENT

Use service contracts for maintenance and services for equipment or facilities with flexible service schedules. Customer contracts facilitate product licensing and support.

Field service organizations often benefit from using multiple contract types. For example, a safety and security company may set up service contracts to maintain a hospital security system. Customer contracts cover security monitoring services.

Contracts provide flexible options to tailor requirements to your business and the needs of your customers. Contracts can be defined by branch location with flexible schedules and custom pricing and billing options. Billing settings can vary across branch locations. Further, contracts may be linked to master agreements.

### AUTOMATED BILLING

Automate billing cycles for contracts with Acumatica’s powerful workflow engine. Generate billing cycles for review before transmitting invoices to customers or processing credit cards or automated bank transactions. Transmit invoices, statements, and other documents via email. Customers can access documents from the secure customer portal.

### INTEGRATED FINANCIALS

Acumatica encompasses everything accounting professionals need to manage field service finances. Key modules include general ledger, accounts payable, accounts receivable, and recurring and deferred revenue. Other modules include cash management, currency management, sales tax, and intercompany accounting.



## 9. BUSINESS INSIGHTS

# Gain Actionable Insights from Your Data

Field service executives and management rely on information to understand what is happening across the business. What is the sales pipeline? Are contract renewals up or down? How long does it take to complete a service appointment? Do we have enough inventory on-hand to meet our service obligations? These are just a few of the questions Acumatica answers through a comprehensive collection of inquiries, reports, dashboards, notifications, and business intelligence applications to make your job easier and more productive.

“Managers can now drill down within Acumatica and see where an actual number is coming from instead of having to asking accounting to find it.”

- YURI DUROVSKIKH, IT MANAGER, OFS INTERNATIONAL

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### INQUIRIES AND REPORTS

Generic Inquiries in Acumatica offer a way to extract the specific data you need and present it to reporting functions for analysis. But they are not just for reports. They can be used in dashboards, made available to business intelligence tools, and offer drill-down capabilities for even more detailed analysis.

The Generic Inquiry writer is a reporting tool that can access any data in Acumatica—including data stored in customized fields—and publish it, export to Excel, or format it for OData. The OData option exposes the data for use with business intelligence tools like Microsoft Power BI.

Acumatica provides hundreds of standard reports with a native report designer that is intuitive and easy to use by non-technical staff. Multi-dimensional reports use subaccounts and segmented keys for concise financial reporting. Setup schedules for report generation, generate PDF files, and use filters and sort options to create meaningful reports by role.

### CUSTOMIZABLE DASHBOARDS

Acumatica dashboards are a convenient way to display essential, timely, and meaningful data to tell what you need to know immediately. With Acumatica dashboards, you can monitor current financial, operational, and organizational information. Analyze real-time trends and metrics that relate to your job. Tailor dashboards by role with enforced data-level security built on Acumatica data or external data. Dashboards provide live drill-downs to detailed views of the data.

### POWERFUL BUSINESS INTELLIGENCE

Acumatica leverages business intelligence tools, such as Microsoft Power BI, to aggregate data from multiple sources, extract actionable information for strategic and tactical decisions, and present it visually to stakeholders. Filter and sort data or analyze it in pivot tables for powerful insights into every aspect of the business.



## 10. MOBILITY AND CONNECTIVITY

# Work Effectively, Anywhere, On Any Device

Today's workforce is increasingly mobile and telework scenarios are crucial for the new state of work. Acumatica Cloud ERP enables users to work from anywhere on any device. Acumatica facilitates communication and collaboration with employees, customers, and vendors ensuring business operations continuity in even the most difficult times.

“We love it (Acumatica) because it gives access to all of our employees no matter where they are. We always know that our employees can be available to update their records. Our field service techs—they especially love it because they can update their cases at the time they are doing their thing—put their notes in. Our managers can see that they're updating it at that exact time. It just gives a lot of transparency for everyone involved in the organization.”

- HAYLEE HICKS, MARKETING TECHNOLOGIST  
BENCHMARK TECHNOLOGY GROUP

### **CLOUD-NATIVE**

Acumatica provides a unique cloud-native platform optimized for speed, security, and performance on any device. Cloud-based systems provide access to every feature from browser-enabled devices connecting back-office employees with remote field service and sales teams. Cloud ERP reduces IT infrastructure costs and reduces on-going costs for maintenance, upgrades, and support.

### **MOBILE FRIENDLY**

The full suite of Acumatica modules is available on any mobile device. Specialized applications streamline mobile transactions such as warehouse management for mobile inventory transactions or mobile expense receipt scanning for service orders or projects. Field service appointments and deliveries are also supported on mobile devices. Other mobile features include time reporting, sales management, and approvals workflows.

### **BUSINESS CONTINUITY**

Cloud ERP systems provide business continuity and peace of mind. Systems and data are secured and backed-up with redundancy to ensure maximum up-time compared to on-premises applications. Businesses continue to work without disruption avoiding downtime due to hurricanes, floods, tornados, fire, or global pandemics.

### **CONNECTIVITY**

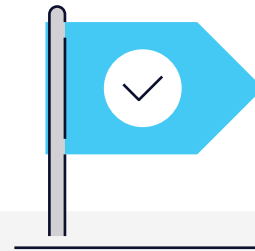
Easily connect Acumatica with leading line of business applications or customized in-house systems. Acumatica's powerful platform provides SOAP and REST API integration with low-code or no-code customizations. The unique architecture protects the integrity of your data with multiple levels of security. Leading marketplace business applications provide plug-and-play integration to Acumatica offering customers ample choices in business solutions.

# Grow Your Field Service Business with Acumatica Cloud ERP

Field Service organizations struggle to keep up with constant scheduling changes. Access to siloed data and disparate systems create barriers to growth. Contract and billing complexities cause productivity bottlenecks, requiring manual data entry impacting downstream business processes.

Acumatica is a unique cloud-based ERP with last-mile functionality that helps field service companies grow. Acumatica helps maximize resources, improves scheduling, and boosts productivity with intelligent route optimization. Effectively manage warranties, track project costs, and automate billing. Manage customer equipment with improved insights and a connected, mobile workforce.

The future-proof Acumatica cloud platform is designed for modern technologies, rapid integrations, scalability, and ease of use. Acumatica provides the best business management solution for digitally resilient field service organizations. Built for mobile and telework scenarios, Acumatica delivers flexibility, efficiency, and continuity of operations to growing small and midmarket field service organizations.



“I drink a lot of coffee and love the way I’m treated at Starbucks. It’s the same with walking into an Apple store—you almost feel like you walked into Heaven—and everyone wants to help you right away. To me, those are two of the highest customer experiences you can have, and Acumatica is right up there.”

– KELLY BURNS,  
ERP DEVELOPER & FORMER COO,  
M3 TECHNOLOGY GROUP



**Acumatica Cloud ERP is a comprehensive business management solution that was born in the cloud and built for more connected, collaborative ways of working. Designed explicitly to enable small and mid-market companies to thrive in today’s digital economy, Acumatica’s flexible solution, customer-friendly business practices, and industry-specific functionality help growing businesses adapt to fast-moving markets and take control of their future.**

For more information on Acumatica, visit [www.acumatica.com](http://www.acumatica.com) or follow us on [LinkedIn](#).

# THE ANSWER COMPANY

## About The Answer Company

For more than three decades, The Answer Company ERP consulting group has been using technology to transform businesses.

Our nationwide services industry experts are passionate about cutting-edge technology and have worked with a wide range of field service companies to help them optimize their scheduling and route planning, leverage tight project accounting controls, enable seamless mobile access for field staff, and keep accurate records for invoicing, maintenance, and certifications.

We work with clients to build solutions that align with core business objectives, giving them the power to make informed decisions, enhance productivity and employee satisfaction, and achieve sustainable growth.

With us by their side, clients can optimize their operations and stay competitive.

For more info, visit: [www.theanswerco.com](http://www.theanswerco.com)

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