



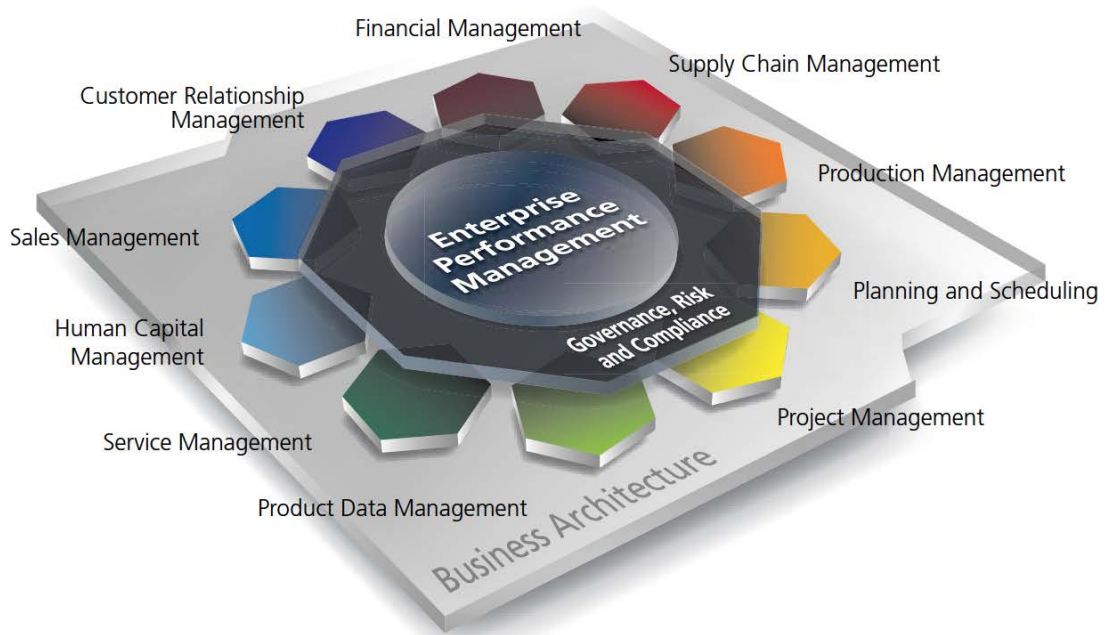
# Epicor Service Management

Inspiring better customer service with the  
right technology.



# Service Management

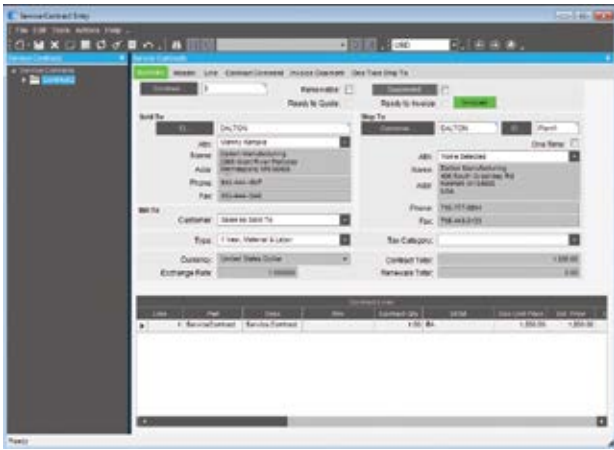
Epicor Service Management optimizes customer service with timely response to customer requests and puts knowledge in the hands of customer service personnel. Epicor understands that customers want rapid response service. From initial contact with the customer regarding an incident, to in the field operations, to processing returns quickly and efficiently, Epicor Service Management provides the visibility and accountability your business needs.



- ▶ Field Service
- ▶ Contract Management
- ▶ Maintenance Management
- ▶ Returned Material Authorization
- ▶ Mobile Field Service

## Contract Management

Epicor Contract Management used in conjunction with Epicor Field Service ensures the timely and accurate execution of service contracts. Additionally, this solution holds the historical activities against the contract to better meet customer expectations.



*Give customers fast and effective service with access to detailed information about service contracts and warranties.*

## Service Contracts

Establish service contracts for specific products, customers, and service level agreements. Each contract has an expiration date that is automatically tracked, reducing manual look-up when a customer calls. Tracking of serialized parts within service contracts is included.

## Service Call Center Workbench

Add or update service orders, schedule service orders, execute purchase and material planning, and warranty and service contract management. The service call center workbench also allows drill-down into all associated transactions.

## Warranties

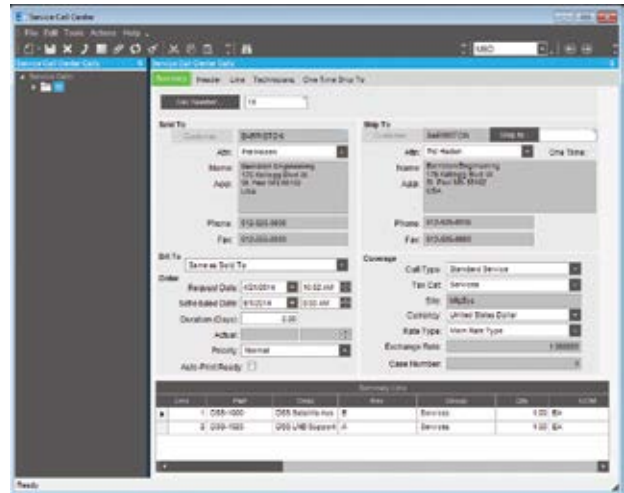
Automatically activate warranties, associated with a part or product group upon shipment of a part. When a repair is needed, quickly determine if the problem is still covered under warranty or if it requires a billable service call.

## Service-Level Agreements

Generate service-level agreements with automatic billing options.

## Field Service

Epicor Field Service is designed for people who install, repair, or service offsite or at the plant or depot. You can centralize all processes related to the dispatching of technicians and cost reporting of service calls in the field. This application supports drop shipment of service parts directly to the customer site. The application is set up for a single interface, so a dispatcher can track all stages of each service call with just a few mouse clicks.



*Centralize service call processing with the Service Call Center Workbench.*

## Inventory Allocations

Allocate inventory from the field as it is needed. Demand is created and all inventory management rules are applied.

## Service Call Center Workbench

Add or update service orders, schedule service orders, execute purchase and material planning, and warranty and service contract management. The service call center workbench also allows drill-down into all associated transactions.

## Labor Charges

After completion of a job, labor hours and service types are entered into the service call ticket. Depending on how the service call was set up, those charges may be absorbed into the service contract or automatically invoiced to the customer.

## Material Charges

As materials are used in the field, they can be entered into the service ticket as incurred costs against the service call. If the costs are billable, the customer is automatically invoiced.

## Time and Material Billing

Easily access online time and material cost data and generate an invoice.

## Tracking Service Inventory

Perform inventory mass issues to a specific job or repair to quickly relieve inventory of all parts used. If stock is allocated to the field engineer and consumed as needed, stocking locations can be set up and tied to the specific engineer.

## Returns

Handle inventory or warranty returns with a simple transaction.

## Cost-Of-Service

Access reports providing overall numbers, as well as detailed information on individual contracts and warranties to know whether you are making or losing money.

## Automated Dispatching

Automatically dispatch technician and field engineer resources based on availability. If Advanced Planning and Scheduling is deployed, they can be dispatched based on resource capability. You can print a dispatch report, along with individual service tickets, to provide documentation for technicians to take to each job site.

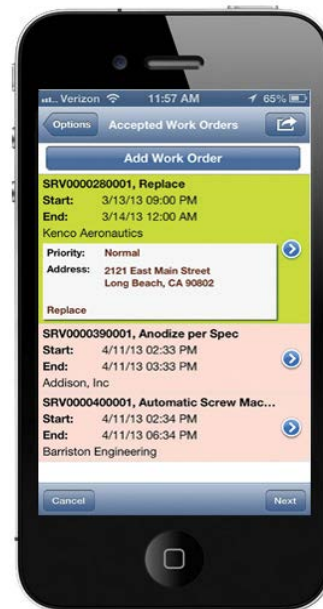
## Mobile Field Service

Mobile Field Service is an enterprise mobility solution for field service providers incorporating comprehensive field service

functionality and full data synchronization in an easy-to-use, workflow-based mobile application for wireless mobile devices, smartphones, and tablets. This comprehensive solution enables you to:

- ▶ Receive, process, and update rosters of work orders in the field
- ▶ Track labor, inventory, materials, and equipment in a configurable workflow
- ▶ Incorporate operational health and safety (OH&S), quality assurance (QA), customer approval and other checkpoints as desired, using a simple graphical configuration tool
- ▶ Update work order status in 'real time' from the field
- ▶ Operate online or offline on a local SQL Server database

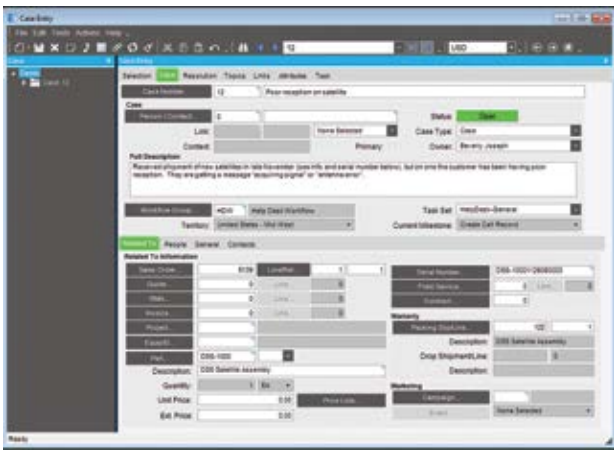
Epicor ERP has the ability to manage work order allocation and scheduling. With Mobile Field Service, your resources in the field and in Epicor ERP will collaborate more productively, be more responsive to customer needs, and provide superior levels of service.



*Mobile Field Service provides "in the field" access to enterprise information for improved service.*

## Case Management

Epicor Case Management is fully integrated with Field Service for easy access to dispatching field activities and providing field service representatives access to online knowledgebases, existing customer field service calls, warranty information, and service contracts.



*Shorten service response time by collecting detailed product problem information and using the integrated features to initiate requests to the appropriate resource.*

## Contact Management

Manage and record all customer interactions for enterprise-wide visibility of customer satisfaction. Link contacts related to a case for easy review of complete case history.

## Communication

Manage and document communication between customer service or field service and the customer for enterprise-wide visibility of customer case and resolution.

## Traceability

Link documents and communication events such as e-mails to cases and calls.

## Social Service

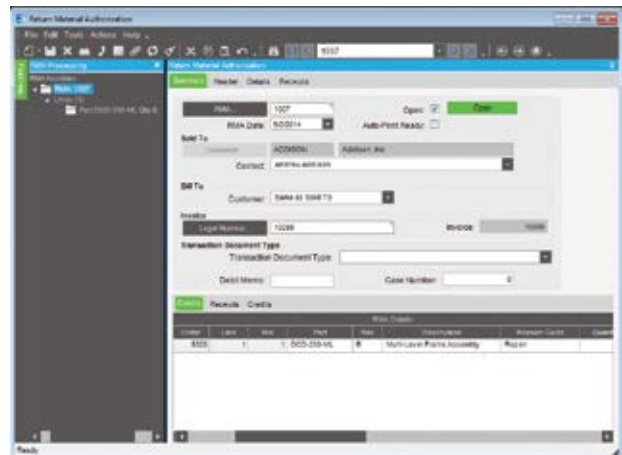
Epicor Social Enterprise brings together contributions from across the organization and the value chain. This information can be collected in a single location with or without the user needing to interact with the ERP. Recommendation or

endorsement of content supports the creation of knowledge bases and reusable content that can be referenced easily using powerful search capabilities.

Issue resolution or Frequently Asked Questions (FAQs) can be linked to a specific service job, or asset or serial number for the life of the object.

## Returned Material Authorization

Enhanced return processing offers enterprise-wide tracking of pending returns and disposition of these parts by unique RMA number. Enter information about returns, and transfer that information to the different groups that may need to take action (e.g., inspection, billing and order processing). Armed with full notes capabilities and document management functionality, tracking the steps of a returned part for requirements certifications is inherent in the system.



*Initiate and track RMAs for customer returns and track reasons for rejected items.*

## Unique RMA Number

Automatically generate a unique RMA number that can be submitted to the customer for tracking parts as they are received.

## Non-Nettable Bins

Use non-nettable bins to keep parts undergoing inspection or review out of current on-hand quantities.

## RMA Disposition

Track and cost the disposal of returned products in RMA disposition.

## Credit Request

Automatically generate a credit request based on disposition of a returned product.

## Returning Serialized Parts

Track returned serialized parts from the moment they come into the plant through quality disposition.

## Notes

Use detailed notes capabilities for closely tracking activity using date and user ID stamping.

## Reason Codes

Assign user-defined RMA reason codes for return analysis.

## Cost Of Returns

Manage cost of returned products by linking to the original order shipped and accessing the cost of the shipment.

## Quality Assurance

Epicor Service Management works alongside Epicor Quality Assurance to provide visibility within the quality assurance inspection queue, send product to the material review board (MRB), and link to corrective actions.

## Maintenance Management

An effective enterprise maintenance management solution for monitoring and managing the deployment, performance, and maintenance of company assets may be the single most important tool for preventing operational surprises. Epicor Maintenance Management enables manufacturers, distributors, and services organizations to save time and money by optimizing maintenance resources, improving equipment up-time and maintenance staff productivity.

Maintenance Management provides companies with a comprehensive toolset for production and facilities equipment maintenance that is critical for running their business. It has

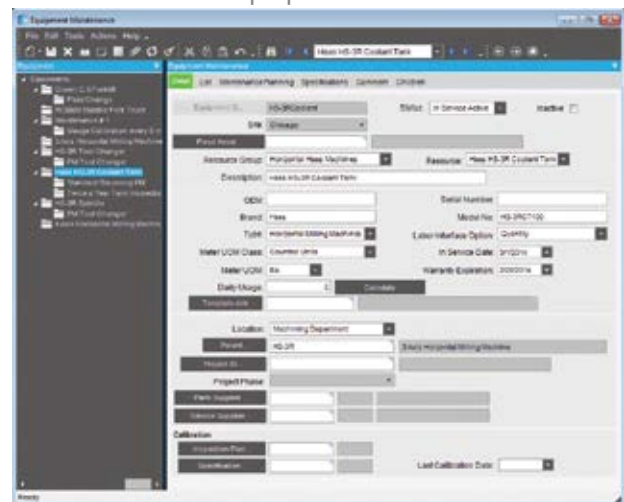
been designed to address maintenance request processing, planned preventative maintenance (according to predefined schedules), and ad hoc break/fix maintenance processing for a single piece of equipment.

Facilities and production equipment can be scheduled for maintenance based on a pre-defined service interval, based on usage, time or via manual requests. This can include internal capital equipment, tools, gauges and fixtures, such as air conditioning units, forklifts, shelving, and shop floor tools. Once a preventative or regular maintenance work order is established, the maintenance planner can schedule equipment down time, and trades resources and materials as needed. When maintenance has been performed on equipment, the tradesperson workers can record their hours spent, any materials used, and closing remarks as to the extent of the repair or service. The Maintenance Management module maintains all equipment, material, and work histories as a result.

## Equipment Maintenance

Closely track each piece of equipment for maintenance purposes with appropriate serial number, in service date, equipment location, warranty expiration date, and preventative maintenance plans. Use Equipment Maintenance to define equipment records for use within the Maintenance Management module. You can establish records for each tool or piece of capital equipment you maintain and which you track for maintenance purposes.

## Parent Child Equipment



*Maintenance technicians record events and resolution at the point of work.*

Manage complex equipment more closely by breaking the equipment down to the component level for targeted preventative maintenance and better maintenance history analysis.

## Maintenance Work Orders

Create maintenance work orders automatically from templates for routine maintenance (e.g., oil changes, filter replacements, belt changes), eliminating manual input.

## Maintenance Request Management

For unscheduled maintenance, a request system is available for anyone to request maintenance on equipment.

## Maintenance Request Queue

Requested maintenance is monitored in a maintenance queue where it can be accepted and assigned to a maintenance tradesperson, deferred for further planning or rejected with reason.

## Preventative Maintenance

Setup complete preventative maintenance work plans then. Automatically create maintenance work orders when preventative maintenance is due. Base maintenance plans on time-based or meter frequencies.

## Scheduled Maintenance

Include scheduled maintenance events, such as resource requirements, in the production schedule for better capacity planning.

## Special Tools Tracking

Closely manage specialized tools, including scheduling of required tools for a specific maintenance event, to ensure the tool is available to perform the required maintenance.

## Issue and Resolution Tracking

Standardized issue and resolutions codes assure analytics of maintenance events. Understand and make decisions more

proactively regarding taking equipment “out of service” or providing employee training in standard care.

## Warranty Tracking

Track the warranty information on all of your equipment, tools and vehicles. Know when your assets are still covered under warranty, length of term, and more.

## Equipment Maintenance Tracker

Review online equipment for maintenance, including status and historical meter readings.

## Work Order Request Tracker

Review request status online.

## Maintenance Work Order Tracker

Online view of maintenance work orders including work order status and details, tradesperson notes, cost details, and completion details.

## Gage Calibration Plans

In conjunction with Enhanced Quality Assurance, calibration test plans can be tied to equipment and executed to track results of tests.

## Repair Histories

Produce complete repair histories for each repair for equipment, including parts and labor cost.

## Reporting

Standardized reports such as the Maintenance Work Order Request Report, Maintenance Work Order Report, and Equipment List help maintenance trades and management men organize and communicate maintenance events and review histories.

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