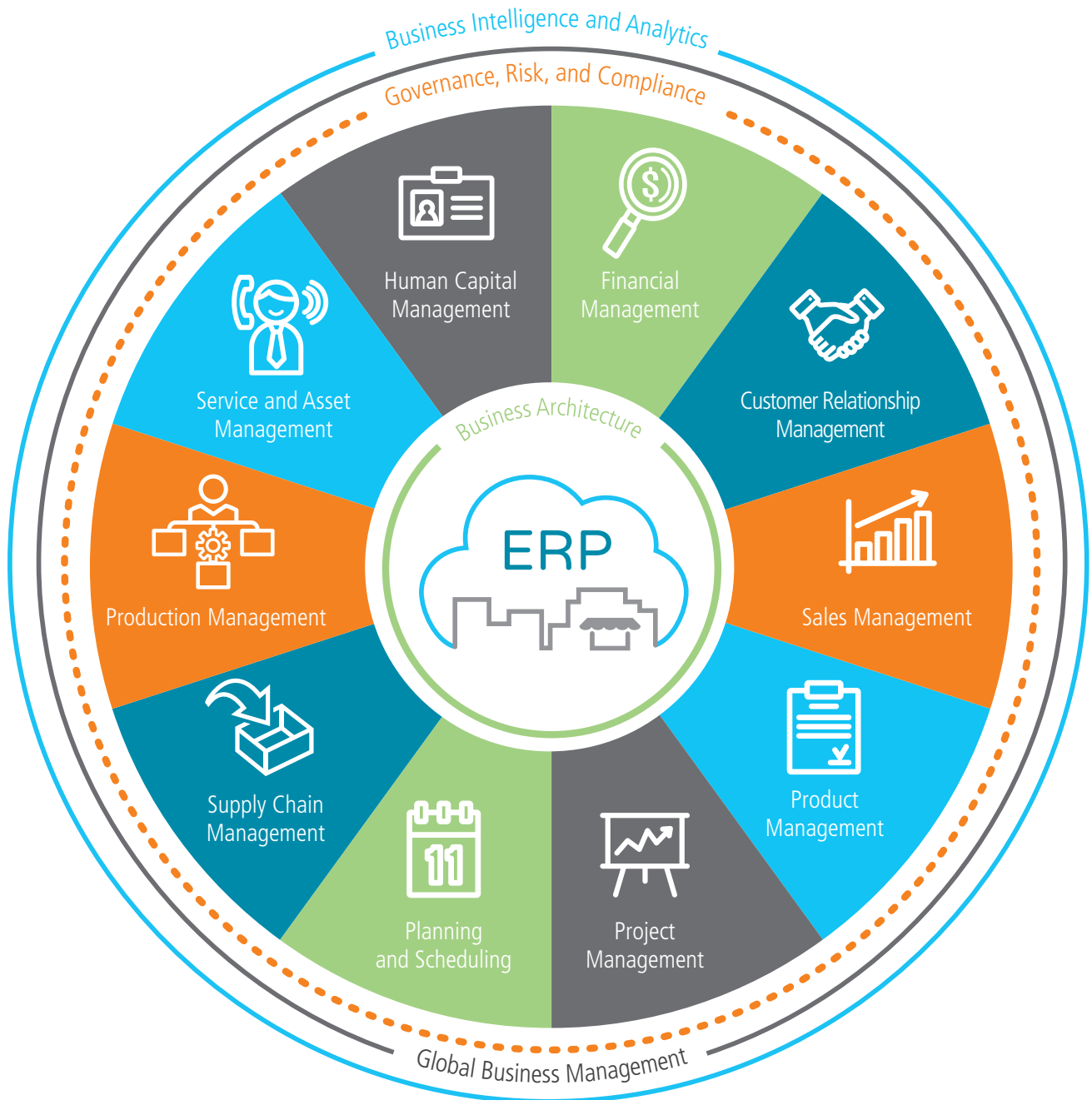
A photograph of two men in a factory or industrial setting. The man on the left, wearing a brown button-down shirt, is holding a tablet and pointing at the screen. The man on the right, wearing a yellow safety vest over a dark shirt, is looking at the tablet. The background is blurred, showing industrial equipment and blue lighting.

Epicor® Enterprise
Resource Planning

Service and Asset Management

Epicor ERP Diagram





Service and Asset Management



- ▶ Service Management
- ▶ Returned Material Authorization
- ▶ Service Contract and Warranty Management
- ▶ Case Management
- ▶ Social Service Management
- ▶ Maintenance Management
- ▶ Field Service Automation

Epicor® Service and Asset Management capabilities are designed to help manufacturers and service organizations maintain equipment, optimize customer service, and keep all technicians and customer-support personnel informed. We understand that your business needs to provide quick responses to customer incidents, keep your field operations informed and productive, and process returns quickly. The Epicor Service Management and Field Service Automation solutions provide the visibility and accountability your business needs. Effective enterprise maintenance management solutions for monitoring and managing the deployment, performance, and maintenance of company and customer assets may be the most important tools for preventing operational surprises. Epicor solutions enable manufacturers, distributors, and service organizations to save time and money by optimizing maintenance resources—improving equipment uptime and maintenance and field staff productivity.

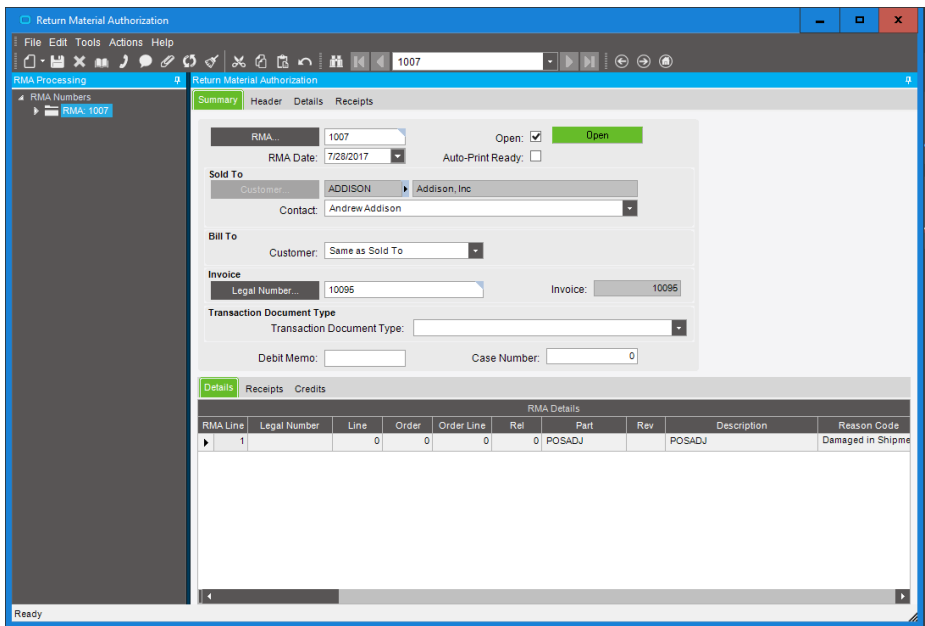


Figure 8 Returned Material Authorization—Initiate and track RMAs for customer returns and track reasons for rejected items.

Service Management

Epicor Service Management is primarily designed for manufacturers who bring customer assets in house for repair or have light requirements for service or installations offsite that do not require purpose-built mobile access for field technicians. You can centralize all processes related to dispatching technicians and reporting costs of service calls in the field with support for drop shipment of service parts directly to the customer site.

Returned Material Authorization

Enhanced return processing offers enterprise-wide tracking of pending returns and disposition of these parts by a unique returned materials authorization (RMA) number. Enter information about returns and transfer that information to the different groups that may need to take action—like inspection, billing, and order processing.

(See figure 8)

Service Contract and Warranty Management

Epicor Contract Management—used in conjunction with Epicor Service Management—allows for the timely and accurate execution of service contracts—including the ability to generate service-level agreements with automatic billing options. Service contracts can be established for

specific products, customers, and service-level agreements—each with an expiration date that is automatically tracked for easy manual look-up. The Service Call Center Workbench allows you to add or update service orders, schedule services, execute purchase and material planning, and manage warranty and service contracts.

(See figure 8.1)

Case Management

Fully integrated with Service Management, Epicor Case Management lets you easily access dispatching field activities and provide field service representatives with access to online knowledge bases, existing customer field service calls, warranty information, and service contracts. Comprehensive contact management, communication, and traceability capabilities allow you to efficiently manage and record all customer and staff interactions across the enterprise. You can also link documents and communication events like emails and calls.

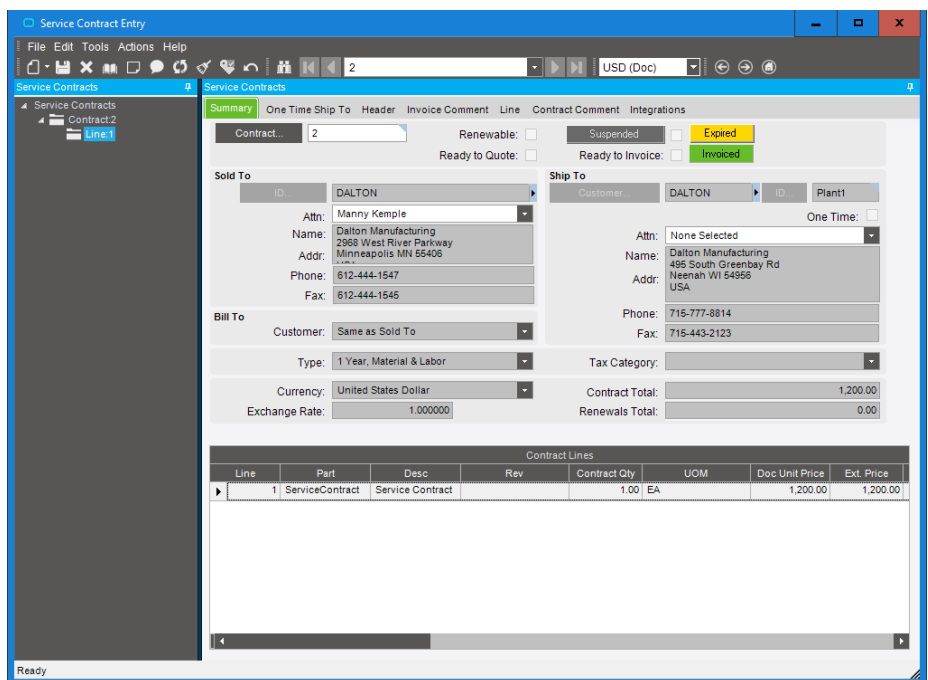


Figure 8.1 Service Contract and Warranty Management—Give customers fast and effective service with access to detailed information about service contracts and warranties.

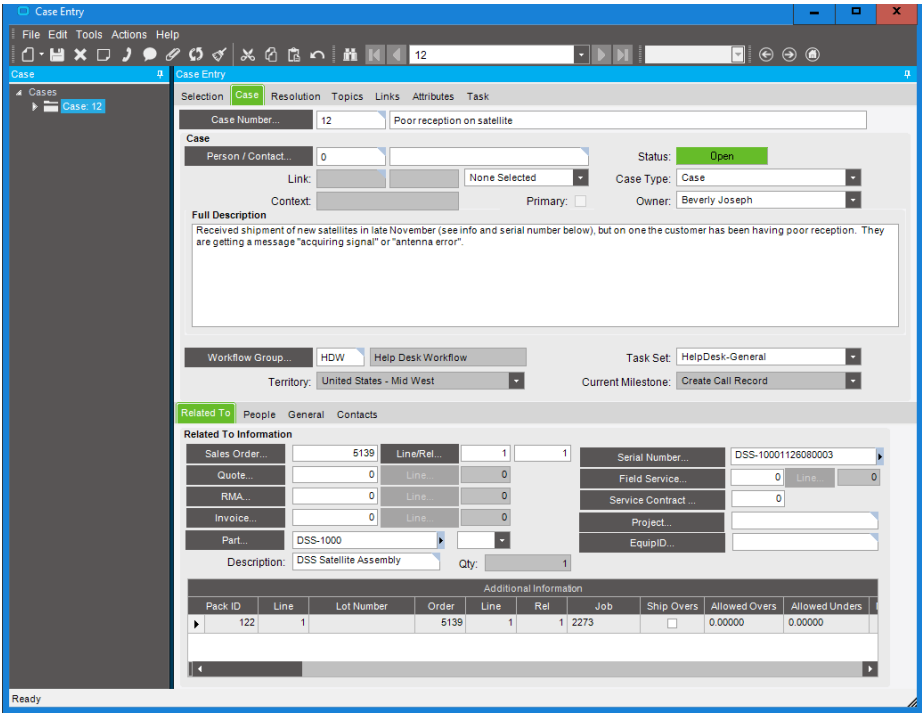


Figure 8.2 Case Management—Shorten service response time by collecting detailed product problem information and using integrated features to initiate requests to the appropriate resource.

Social Service Management

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, asset, or serial number for the life of the object.

(See figure 8.2)

Maintenance Management

Epicor Maintenance Management provides a comprehensive toolset for critical production and facilities equipment maintenance. It was 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 predefined service interval, 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. Eliminate

manual input by creating maintenance work orders automatically from templates for routine maintenance—like oil changes, filter replacements, or belt changes—to eliminate, and then complete preventative maintenance work plans. Automatically create maintenance work orders when preventative maintenance is due. Base maintenance plans on timing or meter frequencies. Once a preventative or regular maintenance work order is established, the maintenance planner can schedule equipment downtime and trade resources and materials as needed. Include scheduled maintenance events—such as resource requirements—in the production schedule for better capacity planning. When maintenance has been performed on equipment, the operators can record their hours, materials used, and closing remarks regarding the repair or service. The Maintenance Management module maintains all equipment, material, and work histories.

Produce complete repair histories for each piece of equipment—including parts and labor cost.

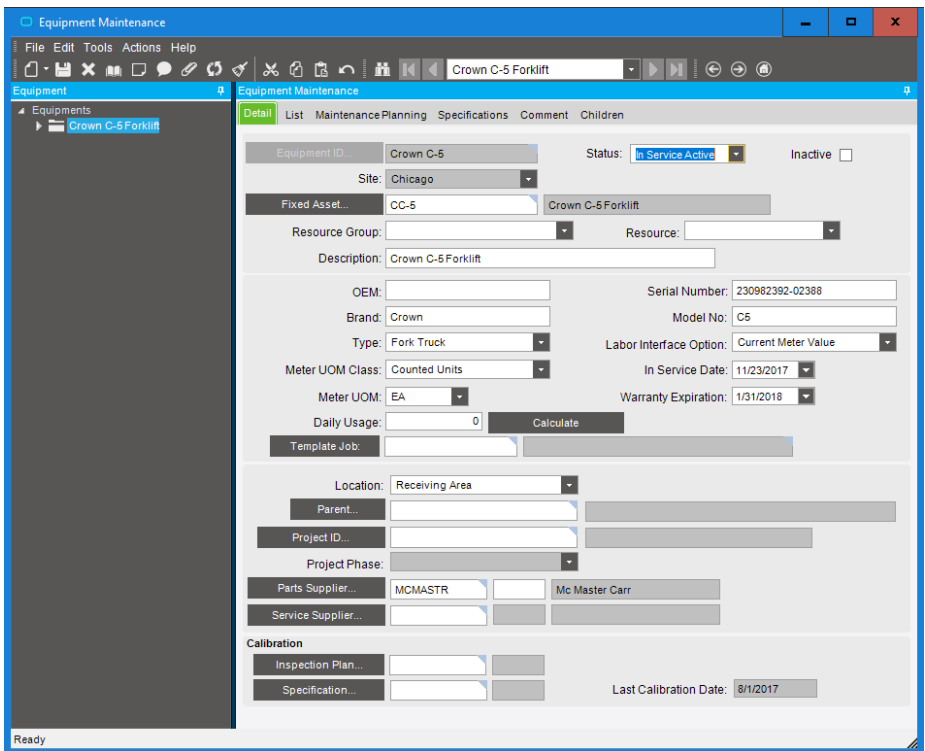


Figure 8.3 Maintenance Management—Maintenance technicians record events and resolution at the point of work.

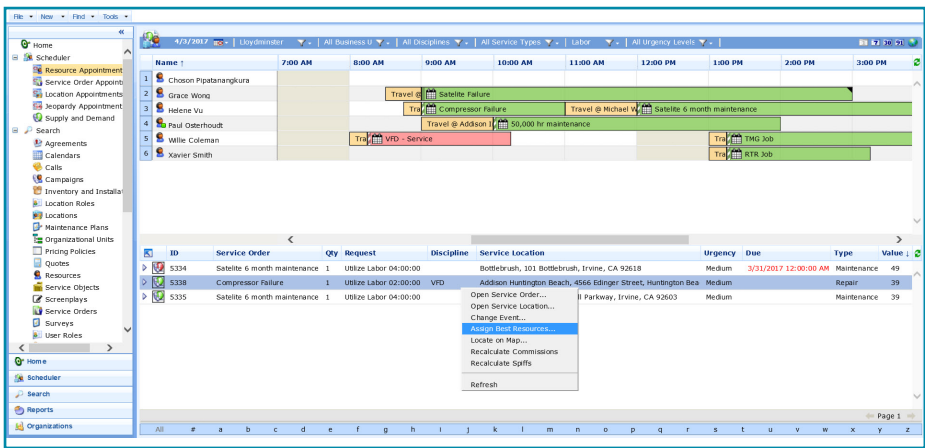


Figure 8.4 Field Service Automation—Easy-to-read schedule board.

Standardized reports—such as the Maintenance Work Order Request Report, Maintenance Work Order Report, and Equipment List—help maintenance technicians and managers organize and communicate maintenance events and review histories. (See figure 8.3)

Field Service Automation

Enhance productivity of field operations with mobile automation and integrated information flow. Connect your office and field staff with the information and processes they need to satisfy customers more efficiently. Epicor Field Service Automation (FSA) can help you drive field productivity for individuals and crews, shrinks response times, lowers costs, improves first-time completion ratios, and increases customer satisfaction to build a competitive advantage. Integrate people and information to empower your workforce to enhance the flow of business and technical information while connecting dispersed employees with convenient mobile devices. Automate manual processes, share best practices and procedural checklists, and track service inventory in real time. Speed up and optimize scheduling and dispatch. Quickly understand service urgency and resource status, and easily match the best resources for each task using best-fit assignment.

Streamline the work order life cycle with rapid-response call taking, and speed work order creation, assignment, dispatch, closure, and billing. Integrated information and automated processes eliminate manual tasks and redundant data entry. Manage contracts, warranties, and assets more efficiently. Track asset histories and automate work order generation and billing. Manage terms, rates, and timeframes. Gain real-time insight for improvement, and access operational and resource information at a glance. Track trends and understand costs, so you can manage performance and make better decisions for enhanced profitability. Provide customers with self-service capabilities—including work order status and new work requests.

Track service stock accurately at mobile and fixed locations to reduce write-offs.

Automatically adjust inventory records based on field use or in-route purchasing. Forecast materials requirements, and take advantage of bulk and just-in-time ordering. Check inventory locations and order materials directly from the field.

Take advantage of Bing® Maps integration to provide office and field staff with street-level mapping, route visibility, and turn-by-turn directions. Use any supported GPS tracking system in the field to quickly locate resources geographically from the office and optimize work assignment. (See figure 8.4)

Field Service Automation Mobile experience

Field service technicians are able to access and input information in real time with the use of a smart mobile device—whenever and wherever they need—to increase productivity, efficiency, and customer satisfaction. Complete work tickets, review service history, manage inventory, access customer pricing, and obtain electronic signatures—all with automated real-time capture. Our intuitive, user-friendly, and multiplatform HTML5 mobility solution runs on a variety of devices. Use smartphones, tablets, and laptops for both online and offline communications with the back office.

If you’re looking to truly automate your field service organization, a mobile app with offline functionality needs to be a priority

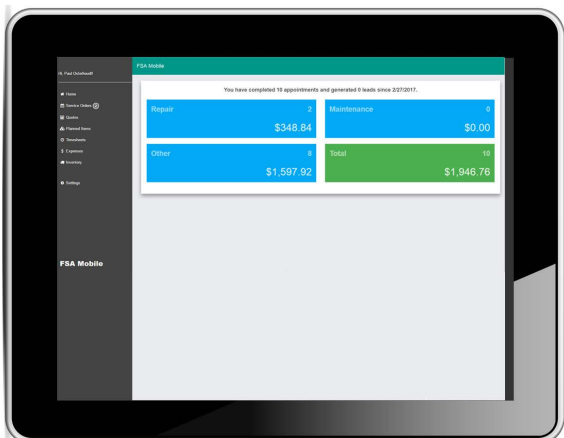


Figure 8.5 Mobile Experience—Service technicians can view service order status from mobile device.

for your technicians. With your serviceable assets located at countless types of job sites, it is imperative to have a mobile app that allows you to access the information you need to manage your inspections, work orders, and signatures without a cellular or Internet connection. For those organizations that service remote sites or equipment in a distant field, you cannot afford to arrive at the job site without access to your information. In order to truly streamline your field service organization, you need to go paperless with a mobile device, and equip your technicians with the right information—anywhere, anytime.

(See figure 8.5)

About Encompass

Encompass Solutions is a business and software consulting firm that specializes in ERP systems, EDI, and Managed Services support for Manufacturers and Distributors. Serving small and medium-sized businesses since 2001, Encompass has helped modernize operations and automate processes for hundreds of customers across the globe. Whether undertaking full-scale implementation, integration, and renovation of existing systems, Encompass provides a specialized approach to every client's needs. By identifying customer requirements and addressing them with the right solutions, we ensure our clients are equipped to match the pace of Industry.

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