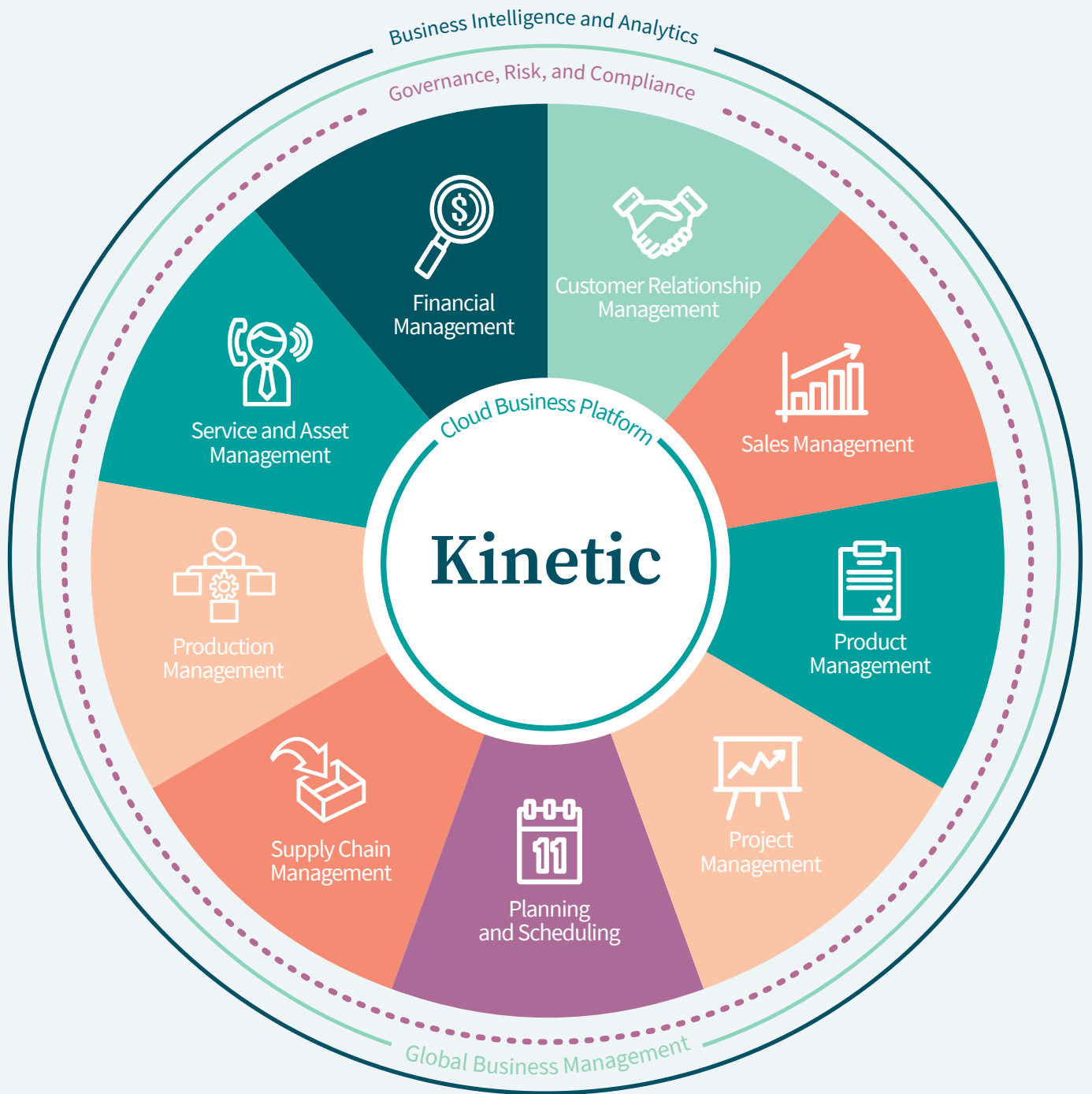


EPICOR

Service and Asset Management







Service and Asset Management

- Service Management
- Returned Material Authorization
- Service Contract and Warranty Management
- Epicor Case Management
- Maintenance Management
- Field Service Management



Production Management

- Epicor Job Management
- Advanced Production
- Kanban Lean Production
- Data Collection
- Epicor Advanced MES
- Quality Assurance
- Epicor Quality Management System (QMS)



Supply Chain Management

- Purchase Management
- Supplier Relationship Management
- Supplier Portal
- Inventory Management
- Epicor Advanced Materials Management
- Advanced Unit of Measure
- Shipping and Receiving
- Epicor Quick Ship
- Epicor Warehouse Management System (WMS)
- Supplier EDI and B2B Integration



Planning and Scheduling

- Forecasting
- Master Production Scheduling
- Smart Demand Planning
- Epicor Material Requirements Planning (MRP)
- Scheduling and Resource Management
- Advanced Planning and Scheduling (APS)



Project Management

- Project Planning and Analysis
- Project Generation
- Project Billing
- Resource Management
- Contract Management
- Planning Contract
- Time Management
- Expense Management
- Epicor Advanced Project Management (APM)



Financial Management

- Global Engines
- General Ledger
- Accounts Receivable
- Accounts Payable
- Tax Automation
- Epicor Financial Planning and Analysis (FP&A)
- Financial Reporting
- Credit Card Payments
- Cash Management
- Credit and Collections
- Asset Management



Customer Relationship Management

- Epicor Contact Management
- Epicor Marketing Management
- Epicor Lead and Opportunity Management
- Epicor Case Management
- CRM Mobile
- Integration to Salesforce.com®



Sales Management

- Estimate and Quote Management
- Order Management
- Sales Order Automation
- Epicor EDI/Demand Management-Point of Sale
- Epicor Commerce
- Dealer Portal
- Epicor CPQ



Product Management

- Bill of Materials
- Routings
- Engineering Change and Revision Control
- Document Management
- CAD Integration
- Product Lifecycle Management
- Product Costing
- Product Configuration



Governance, Risk, and Compliance

- Corporate Governance
- Risk Management
- Security Management
- Business Process Management
- Global Trade Compliance
- Epicor Electronic Reports
- Environmental and Energy Management



Business Intelligence and Analytics

- Operational Reports/Dashboards/IOE/OEE
- Descriptive Analytics (Business and Financial User Reporting/Dashboards)
- Diagnostic Analytics (Scorecards/KPIs, Financial Planning)
- Predictive Analytics (Forecasting)
- Data Warehousing
- Role-Based Analytics and Business Intelligence
- Mobile Business Intelligence



Cloud Business Platform

- Mobile, Browser-Based Experience
- Epicor Automation Studio, Powered by Workato: iPaaS + Automations
- Epicor Virtual Agent
- Epicor Collaborate
- Enterprise Search
- Epicor Learning
- Epicor Business Process Management (BPM)
- Epicor Enterprise Content Management (ECM)
- Business Workflow Automation
- IoT and IIoT Applications
- Epicor Commerce
- Epicor EDI and B2B Integration
- Electronic Reports Engine
- Epicor Application Studio Configuration
- REST Services and Epicor Functions
- Updatable Dashboards
- Epicor Integration Cloud
- Deployment Flexibility
- Microsoft Azure Cloud
- Security Management



Global Business Management

- Multicompany Management
- Multicurrency Management
- Global Multisite Management
- Multilingual Data Management
- Master Data Management
- Scalable, Distributed Deployment
- Global Engines

Contents

Field Service Management6

Returned Material Authorization6

Service Contract and Warranty Management.....6

Case Management.....6

Maintenance Management6

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

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. Service Management and Field Service Management 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.

Field Service Management

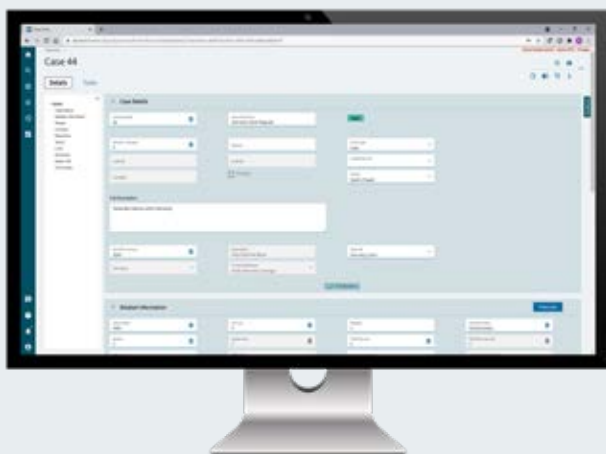
Service Management is primarily designed for manufacturers who bring customer assets in house for repair or have light requirements for service or installations offsite that do not require purpose-built mobile access for field technicians. You can centralize all processes related to dispatching technicians 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.

Service Contract and Warranty Management

Contract Management—used in conjunction with 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.



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

Case Management

Fully integrated with Field Service Management, 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.

Maintenance Management

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.

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.

Epicor Service Pro

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.

Service Pro is a comprehensive, cloud-based service management application integrated to Kinetic, that helps organizations improve enterprise-wide field service management and increase mobile field workforce efficiency. From a single application, manage all field service activities—from calls, work orders, and assets, to warranties, scheduling, service contracts, and parts.

Service Pro is most often used by manufacturers who service equipment, machinery, infrastructure, or other products at customer sites. With its visual scheduling capability and connected mobile app, a call taker or dispatcher can easily find the closest qualified technician who is available for the work assignment within the ETA window called for by the service level agreement. Additionally, they have visibility into all other scheduled and unscheduled appointments in their region to quickly identify opportunities to minimize travel time—for example, performing a planned maintenance task after completing a nearby repair.

For companies with advanced scheduling needs or very large technician teams, Service Pro Optimize can intelligently advise and automatically schedule work assignments based on the customer's most important criteria.



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

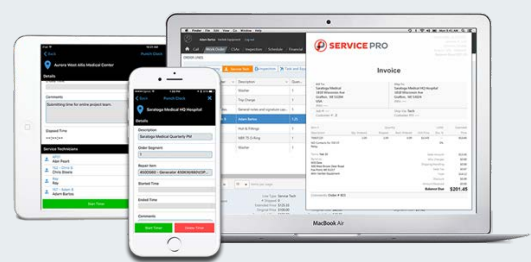
Service Pro Mobile

Help improve customer satisfaction, increase field service technician utilization, and boost enterprise service efficiency with a proven cross-platform mobile field service application. If you're looking to truly automate your field service organization, a mobile app with offline functionality needs to be a priority.

Service Pro Mobile features include:

- Technician Status and Labor Time
- Mobile Asset Management
- Warranty and Contract Visibility
- Spare Parts/Inventory Tracking
- Task Management
- Service History
- Photo and Signature
- Inspections
- Segments

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





EPICOR

We're here for the hard-working businesses that keep the world turning. They're the companies who make, deliver, and sell the things we all need. They trust Epicor to help them do business better. Their industries are our industries, and we understand them better than anyone. By working hand-in-hand with our customers, we get to know their business almost as well as they do. Our innovative solution sets are carefully curated to fit their needs, and built to respond flexibly to their fast-changing reality. We accelerate every customer's ambitions, whether to grow and transform, or simply become more productive and effective. That's what makes us the essential partners for the world's most essential businesses.

Contact Us Today: info@epicor.com | www.epicor.com

The contents of this document are for informational purposes only and are subject to change without notice. Epicor Software Corporation makes no guarantee, representations, or warranties with regard to the enclosed information and specifically disclaims, to the full extent of the law, any applicable implied warranties, such as fitness for a particular purpose, merchantability, satisfactory quality, or reasonable skill and care. This document and its contents, including the viewpoints, testimonials, dates, and functional content expressed herein are believed to be accurate as of its date of publication, August 31, 2023. Use of Epicor products and services are subject to a master customer or similar agreement. Usage of the solution(s) described in this document with other Epicor software or third-party products may require the purchase of licenses for such other products. Epicor and the Epicor logo are trademarks or registered trademarks of Epicor Software Corporation in the United States, and in certain other countries and/or the EU. Copyright © 2023 Epicor Software Corporation. All rights reserved.