

## Service Management

Business without Barriers

**EPICOR®**

Remove the barriers to better customer service with the right technology.

**Service Management**

- Field Service
- Contract Management
- Returned Material Authorization

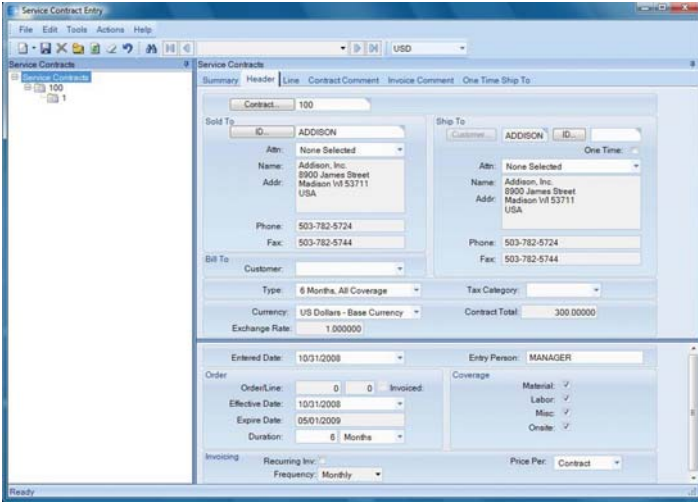


# Epicor Service Management

**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.

## 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

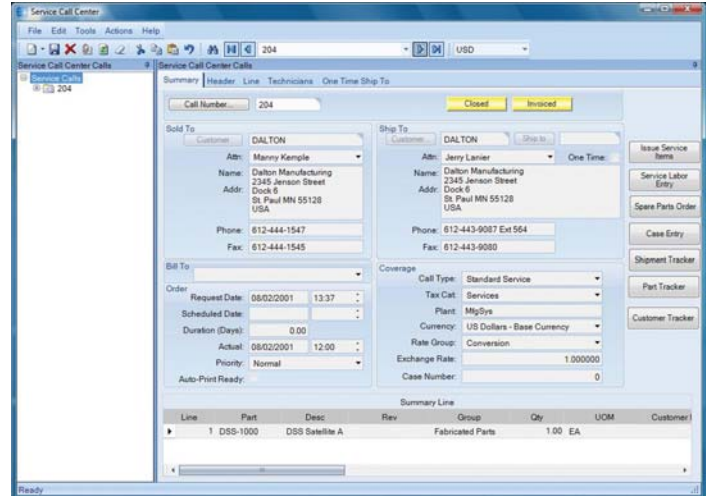
Automatically activate warranties, associated with a part or product group upon shipment of a part. When a repair is needed, quickly determine if the problem is still covered under warranty or if it requires a billable service call.

## 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 (APS) 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.

### Case Management

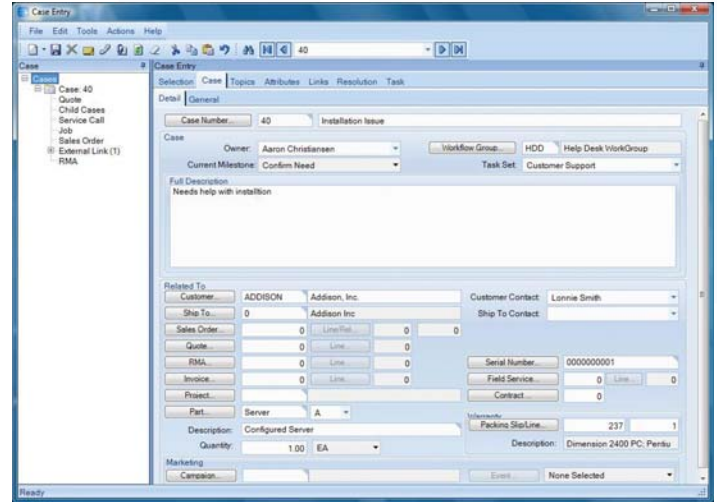
Epicor Case Management is fully integrated with Field Service for easy access to dispatching field activities and providing field service representatives access to online knowledgebases, existing customer field service calls, warranty information, and service contracts.

## Case Management

Case management is an essential part of building better business. Improving the productivity and effectiveness of your support center leads to increased customer satisfaction. Epicor Case Management, part of the Epicor Customer Relationship Management Suite, combines with Epicor Service Management to deliver solutions that help you deliver first-rate service to your customers while controlling costs. The result? A strong return-on-investment through happy customers who make additional purchases and generate new business through referrals.

From initial call to resolution and follow-up, Case Management provides a customer focused solution for personalized, high-quality service. This comprehensive one-stop solution enables your service team to manage current case load and respond quickly to customers for industry leading customer satisfaction. The case management workbench is equipped with time saving links to customer focused activities (e.g., new quotes, orders, RMA requests, or service calls). In addition, there is a search-driven knowledgebase and case-driven workflow for standardizing case resolution.

Case Management is fully integrated with Field Service, part of Epicor Service Management, for easy access to dispatching field activities and providing field service representatives access to online answer books, 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.*

### Case Management Workbench

Manage open case load by status (e.g., open or under review) and allow support managers to assign outstanding cases. Review customers, quotes, orders, outstanding returned material authorization requests, field service calls, warranties, service contracts, and cases from a single case workbench.

### Convert Case

Easily generate a quote, order, field service order, repair order, job and RMA from a case, bringing the detail of the case into the new document.

### Case Context

Use case specific details (e.g., part number, order number, service call reference or warranty reference) to inquire into and link directly to related information, optionally generating new transactions.

### Case Categories

Inquire and report cases by user-defined categories.

### Workflow

Monitor every stage of the support process. Manage processes using user-defined workflow that is case or issue specific, ensuring standardization of process and efficiency.

## Alerts

Set up user-defined alerts to notify activities regarding service cases to management or specialized service employees.

## Online Knowledgebase

Tap into enterprise-wide knowledge documents for fast customer case resolution. Link knowledge documents to cases for analysis.

## 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

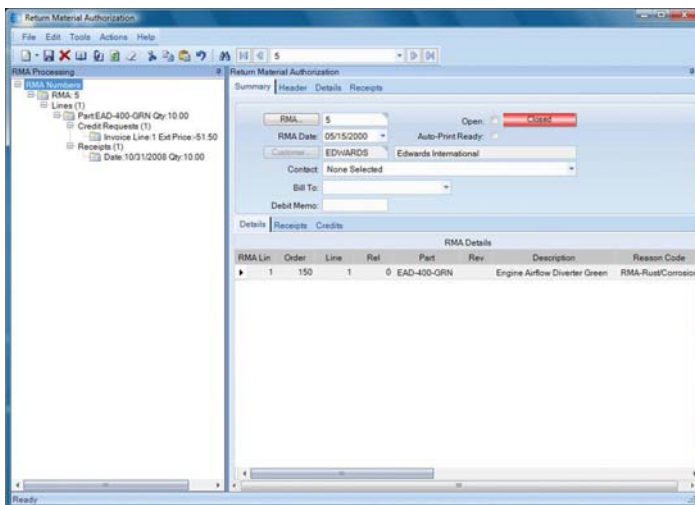
Manage and document communication between customer service or field service and the customer for enterprise-wide visibility of customer case and resolution.

## Traceability

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

## Return Material Authorization

Enhanced return processing offers enterprise-wide tracking of pending returns and disposition of these parts by unique returned material authorization (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.

## Epicor Portal

Epicor Portal customer content pack extends Epicor Service Management by delivering strong self-service capabilities, allowing customers to pull up the status of existing RMAs, including the RMA number to include with the returned parts. Users can also review whether a credit has been applied to their account based on the return.

## 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.

## About Epicor

Epicor Software (NASDAQ: EPIC) is a global leader delivering business software solutions to the manufacturing, distribution, retail, hospitality and services industries. With 20,000 customers in more than 140 countries, Epicor provides integrated enterprise resource planning (ERP), customer relationship management (CRM), supply chain management (SCM) and enterprise retail software solutions that enable companies to drive increased efficiency and improve profitability, and also empower global enterprises to achieve even greater success.



www.epicor.com

## EPICOR.

### Worldwide Headquarters

18200 Von Karman Avenue Suite 1000  
Irvine, California 92612 USA  
Toll Free: 800.999.6995  
Direct: 949.585.4000  
Fax: 949.585.4419  
www.epicor.com

### Latin America and Caribbean

Blvd. Antonio L. Rodriguez #1882 Int.104  
Plaza Central, Col. Santa Maria,  
Monterrey, Nuevo Leon, CP 64650  
Mexico  
Phone: +52.81.1551.7100  
Fax: +52.81.1551.7117

### Europe, Middle East and Africa

No. 1 The Arena  
Downshire Way  
Bracknell, Berkshire RG12 1PU  
United Kingdom  
Phone: +44.0.1344.468.468  
Fax: +44.0.1344.468.010

### Asia

238A Thomson Road #23-06  
Novena Square Tower A  
Singapore 307684  
Singapore  
Phone: +65.6333.8121  
Fax: +65.6333.8131

### Australia and New Zealand

Level 32, Northpoint  
100 Miller Street  
North Sydney NSW 2060  
Australia  
Phone: +61.2.9927.6200  
Fax: +61.2.9956.8976

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