

## Product

- ▶ Epicor® ERP

## Benefits

- ▶ Streamline dispatch decisions by quickly evaluating needs and available resources
- ▶ Use flexible data views
- ▶ Get intuitive alerts
- ▶ Apply powerful optimization tools
- ▶ Achieve operational efficiency

## Enhance productivity and service operations with scheduling automation and integrated field mobility

Connect your office and field staff with the information and processes they need to satisfy customers more efficiently. Epicor Field Service Automation (FSA) drives 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.

Built on modern and proven technologies, this solution is easy to use and compatible with your existing infrastructure. You can take advantage of existing IT investments, deploy with minimal training, offer your people familiar time-saving tools, and achieve a rapid return on investment (ROI) at a low total cost of ownership.

## Integrate people and information to empower your workforce

Enhance the flow of business and technical information while connecting dispatched employees with mobile devices. Automate manual processes, share best practices and procedural checklists, and track service inventory in real time.

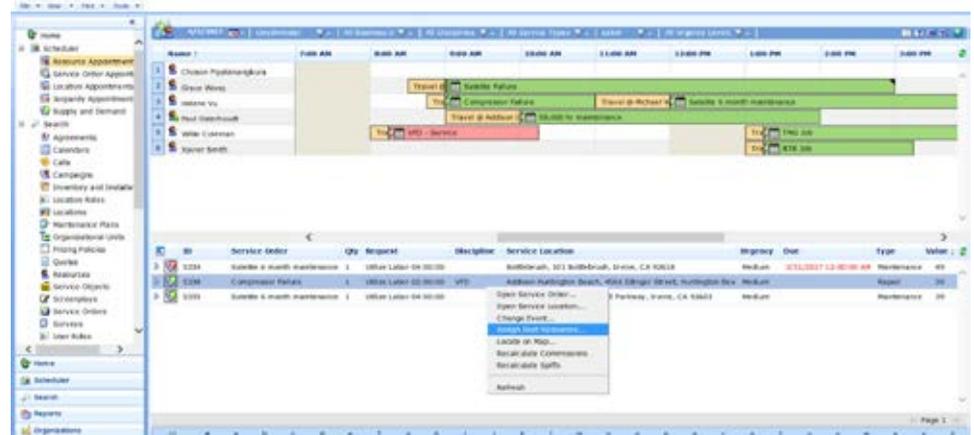
## Expedite and optimize scheduling and dispatch

Quickly understand service urgency and resource status and easily match the best resources for each task using best-fit assignment.

## Seamless integration with Epicor ERP

The integration between Epicor ERP and Epicor Field Service Automation delivers a comprehensive solution across the full process life cycles.

Epicor ERP serves as the main data repository covering key areas like customer, sales, and financial management. Epicor FSA manages the customer and field service operations, providing a first-class service scheduling and mobility experience.



Easy-to-read schedule board

## Streamline the work order life cycle

Enable 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.

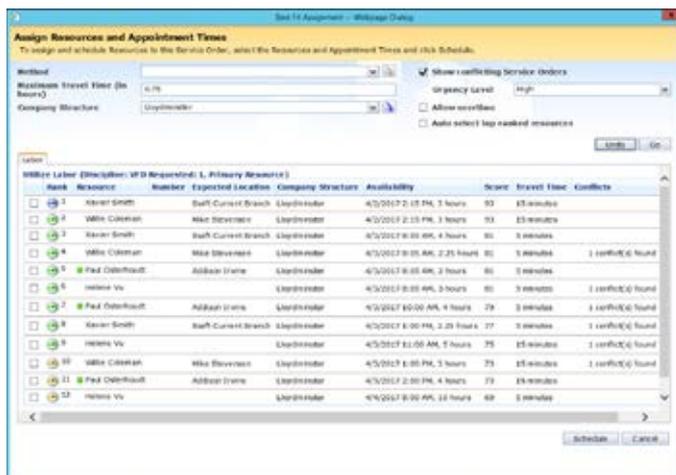
## Gain real-time insight for improvement

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.

## Features

### Call center, scheduling, and dispatch management

Quickly capture service needs and access customer, site, and equipment information to shorten the time between call receipt and job assignment. Track resource commitments to match tasks to the best available resources and generate work orders. Create daily or weekly schedules automatically or by using drag-and-drop tools.



Assign best resources and appointment times

### Work order life-cycle management

View and manage work orders by customer, location, schedule, or assigned resources with color coding and visual icons that provide at-a-glance insight into urgency and status.

### Contract and SLA management

Manage terms, apply different billing rates for various types of work and materials, manage service-level agreements (SLAs), maintain hierarchical relationships among customers and locations, and automate escalations and invoicing.

### Asset and warranty management

Classify assets with barcodes or serial numbers, then track asset locations with maintenance and repair information. Capture costs, revenues, and time spent on each asset. Track warranties against assets and provide field staff with visibility into terms and expiration dates. Ensure service and billing conform to warranty stipulations.

### Resource tracking and performance management

Integrate information about personnel qualifications, certifications, and experience into work assignments. Automate crew calendars and timekeeping and generate individual performance scorecards.

### Vendor and customer portal

Provide customers and vendors with self-service capabilities—including work order status, new work requests, and ability to capture work performed—through integration with standard web services.

### Sales and marketing

Provide robust quoting capabilities in the office and field, including financing options, sales tax, customer price books, rebates, and bundling of goods and services for side-by-side comparison. Set up and track marketing campaigns, sales metrics, and goals management with associated commission and spiff plans.

### Workflow

Manage your unique call center and field-based processes through our dynamic screenplay workflow engine. Screenplay enables you to configure the user experience to match your unique business processes—driving standardization, data capture, and usability.

## Inventory management

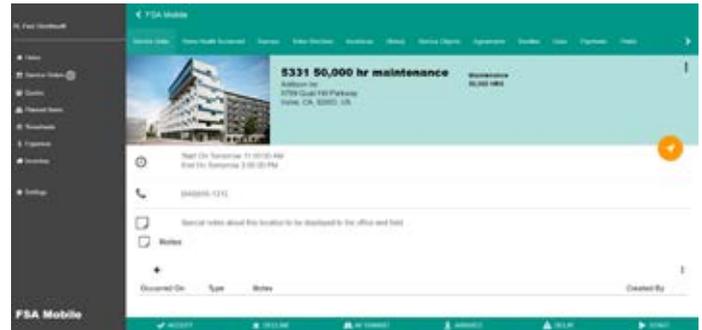
Track service stock accurately at mobile and fixed locations to reduce write-offs. Adjust inventory records that are automatically based on field use or in-route purchasing. Effectively forecast materials requirements and take advantage of bulk and just-in-time ordering. Check inventory locations and order materials directly from the field.

## Bing Maps integration

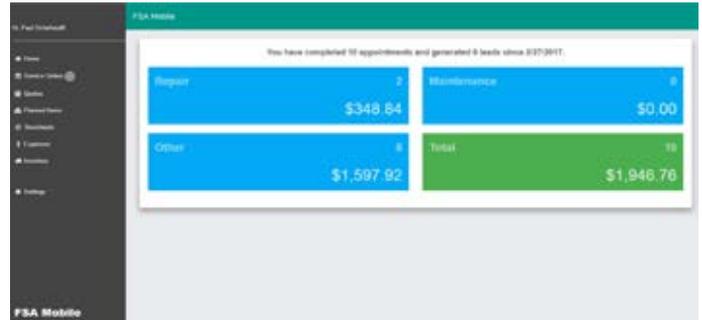
Take advantage of Bing Maps integration to provide office and field staff with street-level mapping, route visibility, and turn-by-turn directions. Use any GPS tracking system in the field to quickly locate resources geographically from the office and optimize work assignment.

## Mobile experience

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, 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.



Intuitive mobile experience



Service technicians can view service order status from mobile device

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