Epicor Service Pro

EPICOR®

Product
▶ Epicor® ERP

Benefits
▶ Increase field operations visibility
▶ Decrease paper and duplicate data entry
▶ Improve operational efficiency
▶ Grow service revenue
▶ Increase customer satisfaction

Optimize Field Service Repair, Preventive Maintenance, Installation, and Inspection Operations

Epicor Service Pro is a comprehensive, cloud-based service management, scheduling, and mobile application 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. Epicor Service Pro is integrated to Epicor ERP.

Empower your dispatchers and service technicians with the information they need to rapidly respond to customer service needs and be optimally prepared prior to the site visit. Epicor Service Pro facilitates the rapid flow of critical trouble-shooting data from the customer to the technician—from the moment the call comes in, to the time the technician has completed the work, finished the inspection, and captured the customer signature.

Epicor Service Pro is most often used by manufacturers and distributors 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, Epicor Service Pro Optimize can intelligently advise and automatically schedule work assignments based on the customer's most important criteria.

Features

Mobile Field Service and Inspection App

Improve customer satisfaction, increase field service technician utilization, and boost enterprise service efficiency with a proven cross-platform mobile field service application.
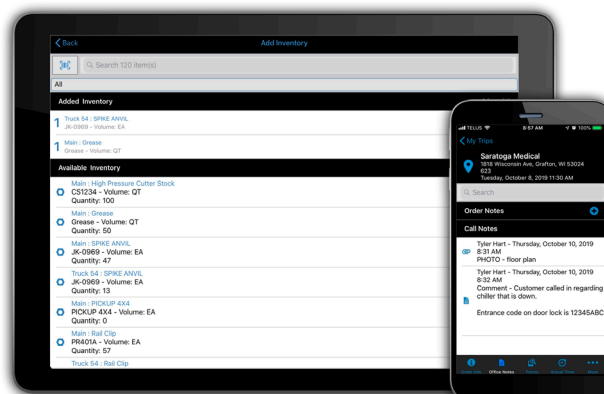
Our intuitive mobile app empowers your field service technicians with immediate information to get the job done right the first time.

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

Visual Scheduler

Schedule the right worker for the assignment with more speed, accuracy, and less manual effort. Provide dispatch personnel with an all-in-one view of the criteria they need to make rapid, accurate scheduling decisions.

- ▶ Automated communication with technician devices
- ▶ Quick and simple drag and drop assignments
- ▶ Single view of service technicians' work status
- ▶ Visual proximity of technicians to customer sites
- ▶ Auto sort by required technician skill set
- ▶ Customize visual scheduler to your business
- ▶ Cloud deployment

Epicor Service Pro Office

Provide your employees with deep service functionality.

- ▶ Enterprise call management and service dispatching
- ▶ Mobile service technician app for iOS and Android devices
- ▶ Task tracking to improve field technician performance and track service profitability with task tracking for the field and the office
- ▶ Extensive inventory/spare parts tracking capabilities for service management staff and technicians
- ▶ Work order management to handle the entire life cycle of a work order—from calls, quotes, and order dispatching, to technician work order management and invoicing
- ▶ Track all relevant information about your technician team—including skills, work history, and location for efficient scheduling and performance reporting
- ▶ Billing and invoicing easily done in a variety of file formats

Contracts and Asset Management

Streamline your service organization with field asset tracking and management capabilities for customer site equipment.

Asset tracking

Detailed tracking and instant visibility of customer site equipment asset information is of critical importance for today's field service organization. The asset tracking capabilities of Epicor Service Pro work in unison with service contracts to provide service organizations with an all-in-one management suite for maximizing customer asset availability and service revenues.

- ▶ Mobile asset tracking with Epicor Service Pro Mobile
- ▶ Asset service and repair history
- ▶ Service contract and warranty visibility
- ▶ Asset component structure hierarchy
- ▶ Mobile asset inspections
- ▶ Automated asset service scheduling
- ▶ Equipment asset transfer tracking
- ▶ Standard asset performance reports

Service Contracts

Complete contract management functionality—from quoting and contract creation, to installment invoicing and automated scheduling. The contract capabilities of Epicor Service Pro work in unison with asset tracking to provide service organizations with a complete management suite for maximizing service revenues and improved customer service.

- ▶ Variable coverage of warranty or service contract by each unit
- ▶ Easily add, transfer, or change existing equipment
- ▶ Apply service contracts to all or some of equipment tracked
- ▶ Generate service agreements
- ▶ Automatic renewal notification
- ▶ Installment billing on a variety of intervals
- ▶ Flexible contract coverage periods
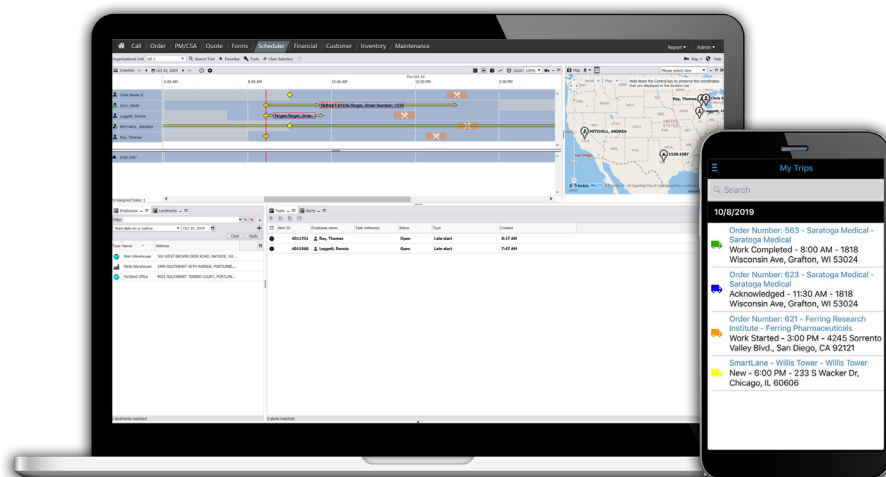
Visual, drag and drop field technician appointment scheduling.

Business Intelligence

Drive visibility of critical field service performance information in graphical snapshots. Instantly dive into supporting operational detail with one-click access from dashboards to records displayed.

Epicor Service Pro Dashboards are easy to use and support real-time stakeholder visibility to important service data—as well as management of the business to key performance indicators. Dashboard

widgets may be customized to include fields most important to the customer and can be exported in a single click to Excel.

All information captured in Epicor Service Pro can be made available in a stakeholder portal— from customers entering new orders and viewing work order status, to service technicians accessing past invoices and manufacturer troubleshooting information.

You can also monitor your service organization's performance and identify important business trends. It includes standard reports, covering calls, orders, customers, technicians, contracts and more. Custom reports may be created specific to customer needs.

- ▶ Call center reports and listings
- ▶ Work order reports and listings
- ▶ Service contract reports and listings
- ▶ Inventory reports and listings
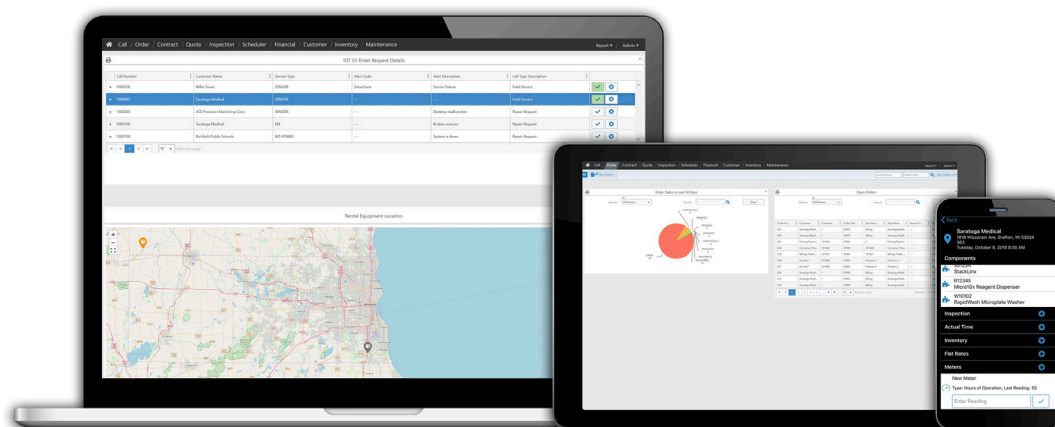
Easily visualize your critical service data through dashboards and reports.

About Epicor

Epicor Software Corporation drives business growth. We provide flexible, industry-specific software designed to fit the precise needs of our manufacturing, distribution, retail, and service industry customers. More than 45 years of experience with our customers' unique business processes and operational requirements are built into every solution—in the cloud or on premises. With this deep understanding of your industry, Epicor solutions dramatically improve performance and profitability while easing complexity so you can focus on growth. For more information, connect with Epicor or visit www.epicor.com.

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