

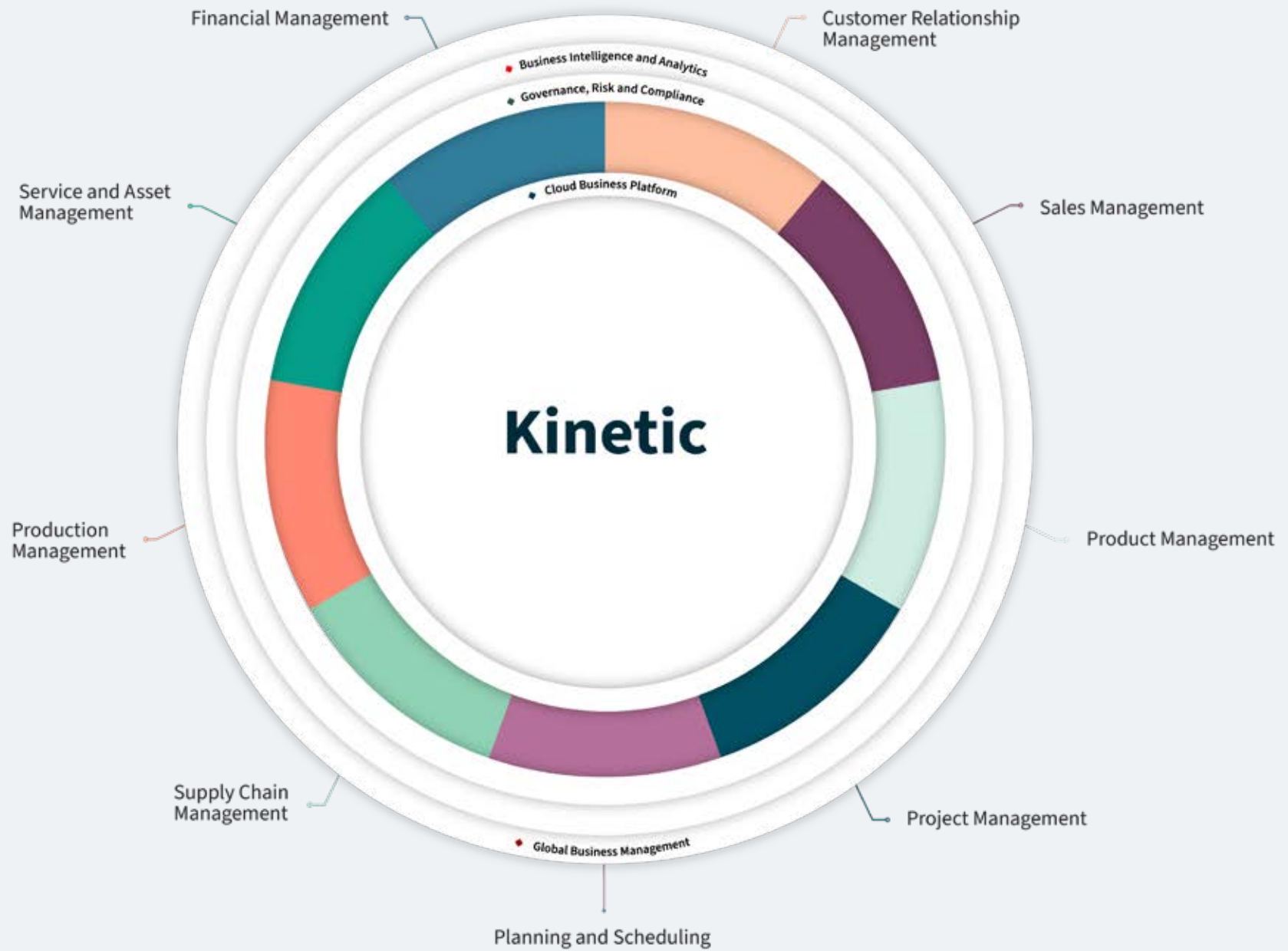
EPICOR

Service and Asset Management



MANUFACTURING







Financial Management

- Global Engines
- General Ledger
- Accounts Receivable
- Accounts Payable
- Tax Automation
- Financial Reporting
- Financial Planning and Analysis
- 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*

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

◆ 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 ED 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
- Data Fabric

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

Production Management

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

◆ Business Intelligence and Analytics

- Operational Reports/Dashboards/IIOT/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

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)

Planning and Scheduling

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

Service and Asset Management

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

◆ Governance, Risk and Compliance

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

◆ Global Business Management

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



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 Epicor FSM solutions help 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 as well as field staff productivity.

SERVICE MANAGEMENT**RETURNED MATERIAL
AUTHORIZATION****SERVICE CONTRACT AND
WARRANTY MANAGEMENT****CASE MANAGEMENT****MAINTENANCE MANAGEMENT****EPICOR FIELD SERVICE
MANAGEMENT (FSM)**

Field Service

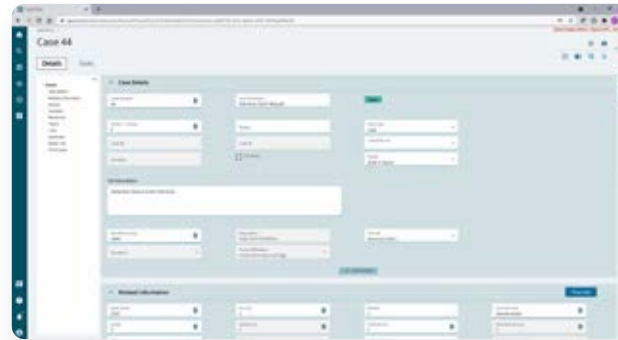
Field Service is primarily designed for manufacturers who bring customer assets in-house for repair, or have light requirements for service or installations offsite that do not require purpose-built mobile access for field technicians. You can centralize all processes related to dispatching technicians 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 of ers 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 Epicor FSM, Epicor Case Management lets you easily access dispatching field activities and help 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

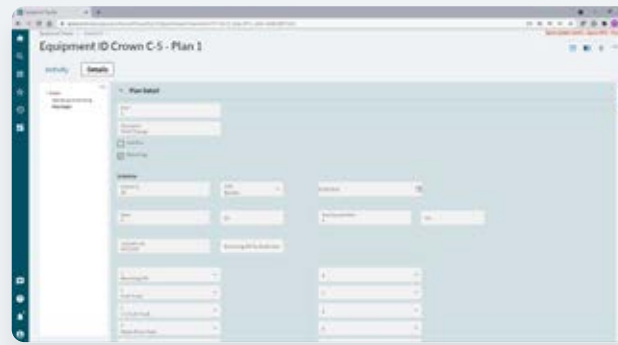
Epicor Maintenance Management helps provide a comprehensive toolset for critical production and facilities equipment maintenance. It was designed to address maintenance request processing, planned preventative maintenance—according to predefined schedules—and ad hoc break/fix maintenance processing for 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. Create maintenance plans based 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. You can 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.



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

Epicor Field Service Management

Epicor Field Service Management (FSM) integrates directly with Kinetic and is designed for manufacturer that use mobile field resources. The tool allows companies to connect with their customers and their customers' equipment while automating and streamlining the service process. The solution allows

customers to save time and make better informed decisions with quick access to customer information, equipment service history, and technician availability and skill level.

FSM contains many crucial field service capabilities that go above and beyond those included within the core Kinetic offering.

These capabilities include:

- Scheduling and dispatching
- Equipment service history tracking
- Signature capture for end-of-service verification
- Off-line mobile capabilities
- User-defined checklist for technicians

Epicor FSM focuses on delivering both wholistic and microscopic views of field service operations, resources, technicians, and schedules. Usability of the mobile interface, seamless connection to data, and real-time updates allow customers to take field service activities to a higher level.



We're here for the hard-working businesses that keep the world turning. You're the companies that make, move, and sell the things we all need. Trust Epicor to help you do business better. Your industry is our industry, and we understand you better than anyone. By working hand-in-hand, we get to know your business almost as well as you do. Our innovative industry solution sets are carefully built to fit your needs and respond flexibly to your fast-changing reality. We accelerate ambitions, whether you want to grow and transform, or simply become more productive and effective.

That's what makes us the essential partner to the world's most essential businesses.

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

This document is informational only. Epicor Software Corporation makes no guarantees, representations, or warranties to the information and disclaims, any implied warranties, such as fitness for a particular purpose, merchantability, satisfactory quality, or reasonable skill and care. Testimonials are unique to the particular user and may vary. Epicor, the Epicor logo, and Eclipse are trademarks of Epicor Software Corporation. Other trademarks are the property of their respective owners. Copyright © 2024 Epicor Software Corporation. All rights reserved.

Epicor Payment Exchange is a payment processing service, which is provided by Fiserv, is designed to be used in connection with a PCI DSS compliant merchant system and operating environment and is subject to and governed by the terms and conditions of your Merchant Application, including the Terms and Conditions related thereto. Using Epicor Payment Exchange service does not guarantee that you will be PCI DSS compliant. The furnishing of any other services (such as the payment gateway) are furnished by Epicor Software Corporation and are governed by and subject to the terms of your customer agreement with Epicor. 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. Epicor, the Epicor logo, Epicor Payment Exchange are trademarks or registered trademarks of Epicor Software Corporation registered in the United States, certain other countries, and/or the EU. The Fiserv name, and related trademarks and service marks, owned by Fiserv, are registered and/or used in the United States and many foreign countries. American Express is a registered trademark of American Express Company and its affiliates. Discover Card is a registered trademark of Discover Financial Services, Inc. MasterCard is a registered trademark of MasterCard International, Inc. Visa is a registered trademark of Visa International Services Association. All other trademarks mentioned are the property of their respective owners. Copyright © 2024 Epicor Software Corporation. All rights reserved.

The results or represented in this testimonial or financial measurements may be unique to a particular customer and each user's experience will vary.