

# Epicor

Mobile Field Service

**EPICOR**<sup>®</sup>  
Business Inspired<sup>®</sup>



With Epicor Mobile Field Service, your resources in the field and in the back office will collaborate more productively, be more responsive to customer needs, and provide superior levels of service.

# Epicor Mobile Field Service

Epicor Mobile Field Service is an enterprise mobility solution for field service providers incorporating comprehensive field service functionality and full data synchronization in an easy-to-use, workflow-based mobile application for wireless mobile devices, smartphones, and tablets. This comprehensive solution enables you to:

- Receive, process, and update rosters of work orders in the field
- Track labor, inventory, materials, and equipment in a configurable workflow
- Incorporate operational health and safety (OH&S), quality assurance (QA), customer approval and other checkpoints as desired, using a simple graphical configuration tool
- Update work order status in 'real time' from the field
- Operate online or offline on a local SQL database

Your back office has the ability to manage work order allocation and scheduling. With Epicor Mobile Field Service, your resources in the field and in the back office will collaborate more productively, be more responsive to customer needs, and provide superior levels of service.

Mobility  
**Inspires**  
productivity

## Maximize Productivity

Epicor Mobile Field Service is the solution for organizations which need to maximize the utilization and productivity of their field service staff. Field Service keeps field staff focused on the job at hand—delivering profitable services to your customers—and takes care of the administrative tasks.

- Manage changes to rosters and work order allocations (either initiated from the office or the field) and communicate these to field and office staff
- Make sure inventory is tracked and inventory policies applied, including complex policies like limited shelf life or serialized components
- Capture use of other consumables and their costs
- Maintain accurate records of labor used on a work order, including time sheeting for different types of resources and equipment
- Provide field staff with access to historical data on assets and locations, customer relationship management data, and the ability to update or correct this information from the field
- Report status of work orders while in progress
- Capture compliance and regulatory data

Field Service solves other key problems in field service operations including return-to-base travel time and poor access to information in the field. Epicor Mobile Field Service is used in a variety of industries including manufacturing, transportation and logistics, local governments, mining and resources, utilities, and oil and gas.



The Epicor Mobile Field Service main menu provides access to the key functions including work order processing and stock transfers.



Workers in the field are notified as updates are complete. They can also view multiple work orders at once according to priority and status.



## Typical Usage Scenario

Work orders generated by Epicor or the dispatcher may be raised to fulfil an asset management plan which includes periodic and/or preventative maintenance, address a break/fix requirement, or deal with a customer incident. The work order may be allocated to a specific resource or resource group, and scheduled to suit the service level agreement associated with the affected asset(s) and/or the availability of resources and inventory products. The Schedule and Dispatch module can be integrated with a mapping solution to assist with work order allocation.

Work orders for all mobile users are synchronized to the Mobile Server, then distributed to the relevant mobile devices.

When a field worker using a mobile device logs in, they will be presented with their roster of work orders for the current period. If there are any unallocated work orders, they will be provided an opportunity to accept these work orders into their roster or decline them.

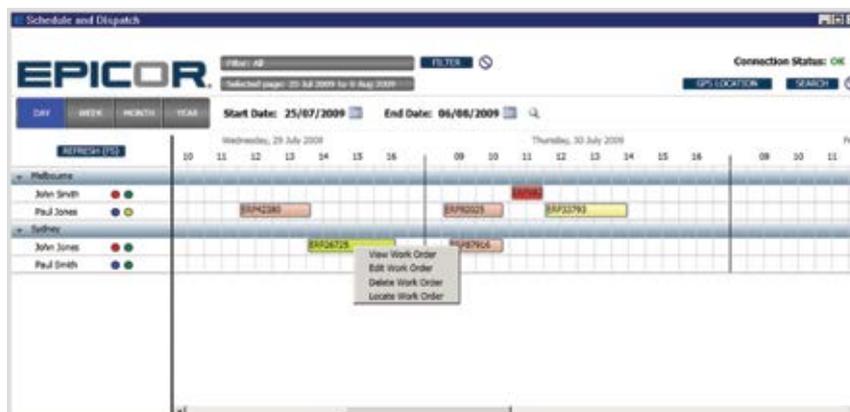
The field worker can view work order details, and the inventory and equipment that may have been allocated to the work order. They can also view their stock at hand and stock in other warehouses, stockpiles or mobile sources of inventory (such as other worker's vehicles).

The field worker can change the status of a work order to indicate that the work order is in process. The changed status of the work order will be reflected in the Schedule and dispatch and/or Epicor as the job progresses. If characteristics like schedule milestones are changed, these can also be reflected in Epicor or the Schedule and Dispatch module.

The work order can be processed and the activity performed, results achieved, and labor, inventory and non-inventory items used recorded.

Optional screens for capturing additional data (e.g., compliance or asset images) can be inserted into this workflow using the Form Builder Toolkit.

Images and other attachments can be linked to work orders and assets, then synced back to ERP. A customer signature and comments can be captured to show that the work performed was accepted. When the work order is complete, the field worker can update the status, close the work order, and proceed to the next work order in their roster.



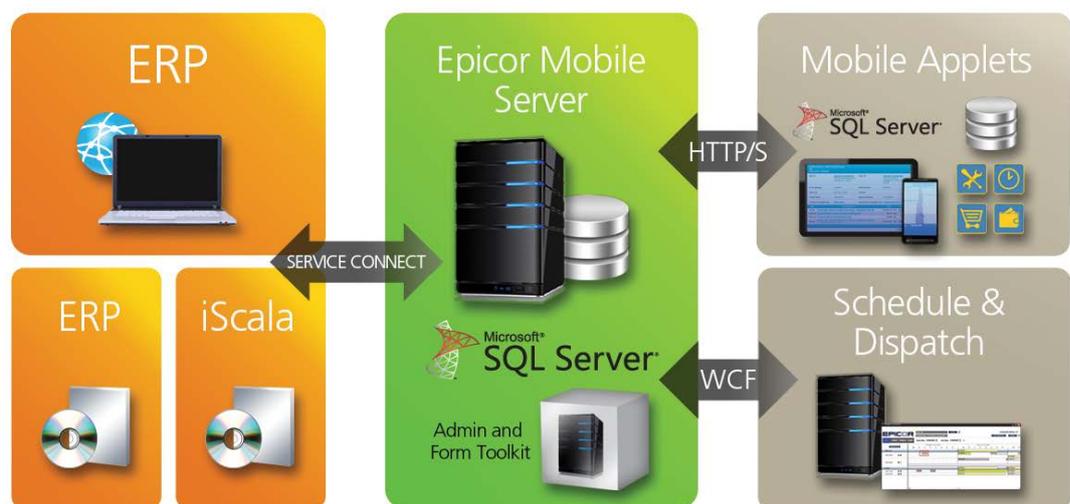
*The Schedule and Dispatch module is a graphical interface that can be used to manage and control the field workforce.*

## Architected for Efficient Field Service

Field Service is much more than a simple mobile device application. The industry-proven Microsoft® three-tier architecture and database synchronization technologies deliver true ERP functionality to the hands of field users with the reliability and data integrity you expect from a genuine Epicor solution.

The Mobile Server distributes and collects data from each of the connected mobile devices, providing them with only the data they need to service their work orders, and collecting only the data required to complete the work order. The Mobile Server also provides the interface for the PC-based Schedule and Dispatch module, which can supplement Epicor functionality for scheduling and dispatch.

The mobile device runs its own Microsoft SQL Server® Compact database, and once synchronized with the Mobile Server can operate offline and stand-alone if the connection is lost. The mobile device provides the field service staff with an easy-to-use window to the relevant functions of Epicor, using a configurable workflow, simple screens with easy data entry features and wizards, and sophisticated data integrity and business rule enforcement.



*Field Service seamlessly links the Epicor database to the Mobile Server database using Sync Services, built on the Microsoft Sync Framework. Integration with other databases (such as geographic information systems, asset management systems or technical references) is also supported by the Sync Framework so that all information relevant to a work order can be sent into the field securely and efficiently.*

## Schedule and Dispatch Module

Epicor Mobile Schedule and Dispatch is a graphical Windows® based module that allows schedulers and managers to route the correct jobs to the correct skillsets. Create jobs and work orders from within the module, add resources and materials, and view status.

The schedule board has an easy drag and drop interface, which you can then use to move jobs or people, change the duration or even do “what if” planning. Then be able to see all of this in a map, with optional GPS information to view what is going on where.

All of this is still connected to your ERP, with this bi directional communication, you don't have to worry about two different systems and having issues with dual entry or not having all the information on time. This will allow your dispatchers faster time to decisions, run a leaner process, and provide satisfaction to your customers and employees.

## Form Builder Toolkit

An optional Form Builder Toolkit is available for defining forms for insertion into the mobile device application workflow. Optional customer forms configured by your system administrator or by Epicor give you the ability to tailor the Field Service solution to suit your specific requirements.

Custom forms and check lists can be created and inserted into the mobile device workflow for collecting data on variables that relate to the item or asset being administered or its environment. For checklists, user-definable tick boxes can reflect OH&S or QA requirements and provide audit trails. Data collected in these forms is sent to Epicor when synchronization is performed.

## Key Features At-a-Glance

Mobile users need sophisticated functionality presented in a simple, easy-to-use workflow. Field Service provides powerful functionality for a variety of areas including work order processing, work order scheduling and allocation, inventory management, asset management, and CRM. Beyond this functionality, Field Service incorporates configurable workflows, integration with 'guide by voice' navigation to an asset and integration with constraint solvers for routing/stacking/resource utilization optimizations.

### Work Order Processing

- User login and data filtering of work orders to match user profile
- Alerts for new and updated work orders
- Work order roster showing work order sequence and schedule
- Configurable ability to accept/decline work orders
- View work order details
- View work order attachments
- View and update asset and customer history
- Navigate to job with GPS mapping services (optional)
- Record work order actions and results
- Record work order inventory, non-inventory usage and returns, with bar code scan data entry, including serial number and lot number tracking
- Record work order actual labor hours by resource and labor type using timesheets
- Record asset condition and raise service request
- Capture images and attach to work order/assets
- Capture compliance and other data on (optional) custom forms (e.g., QA, OH&S)
- Acceptance/completion signature capture with comments

- Update work order status to Epicor (and optionally Schedule and Dispatch) throughout processing of work order
- Simplified data entry methods, including bar code, pick lists, and 'finger friendly' features
- Sophisticated searches for product, customer, and assets
- Customer-configured forms at any point in workflow with ability to populate fields from barcode scanner (optional) Remote device management and lock down (optional)
- Create Service Request and Work Orders from Asset
- Local calculation of pricing and tax for parts and labor, supporting volume and value breaks, customer and contract specific pricing
- Create Work Order without and asset

### Inventory Management

- Edit resource and inventory allocation to work order
- (Near) Real-time inventory and pricelist data
- Alerts for insufficient stock in vehicle
- Transfer inventory to work order from multiple warehouses/stockpiles/other vehicles
- Add consumables/non-inventory materials to work order
- Raise Purchase Request
- Receive purchased goods into stock direct from supplier

### Asset Management

- View asset history
- View, update and create customer and contact information
- View asset service schedule
- Capture observations on asset status

### System Administration

- Multiple Company and Multiple-plant support for one mobile server installation
- Supports Android, iOS, and Windows Mobile devices
- Integrated with other device applications such as phone, e-mail, camera, and scanner
- ERP-independent, can be utilized with other ERP or line of business applications
- Separate SQL database for on and offline use
- Secure synchronization back to ERP
- Available in multiple languages

## CRM

- View customer details, site details (includes OH&S, access and security)
- View key point of contact information
- Capture updates to CRM, site, and asset information
- Capture sell-up opportunities, create service request

## Work Order Allocation and Scheduling Using the Dispatcher Option

- Create/view/edit/track work orders (including periodic work orders)
- Allow one Dispatcher to support multiple Companies
- Accept/decline/delay/suspend/broadcast work orders
- Search customers
- Assign work orders to resource groups or resources
- View history by asset
- Gantt chart view (day/week/month/year) Expand/collapse resource groups
- View fleet and asset location using GPS and mapping package (optional)
- Hover for quick work order details view
- Search assets and asset classes
- Search resources and inventory products
- View work order and SLA status and history
- Apply filters to highlight exceptions
- Expand/collapse resource groups
- Integration to constraint solvers for automatic routing/stacking/resourcing (optional)
- Drag and Drop reallocation, rescheduling, changes to duration of work orders
- Create 'broadcast' work orders, allocated to a resource group rather than a specific resource



Large, stylized, overlapping text in yellow and black, likely representing the company name or a slogan, positioned at the bottom of the page.

## About Epicor

Epicor Software Corporation is a global leader delivering business software solutions to the manufacturing, distribution, retail, and service industries. With more than 40 years of experience, Epicor has more than 20,000 customers in over 150 countries. Epicor solutions enable companies to drive increased efficiency and improve profitability. With a history of innovation, industry expertise and passion for excellence, Epicor inspires customers to build lasting competitive advantage. Epicor provides the single point of accountability that local, regional, and global businesses demand. For more information, visit [www.epicor.com](http://www.epicor.com).

# **EPACCSYS**

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## **ERP SOLUTIONS & SERVICES**

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