

EPICOR

# Field Service Management (FSM)



 MANUFACTURING

# Contents

Field Service Management (FSM) .....	3
The need for cutting edge field service is increasingly paramount, exemplified by everdeveloping industry trends .....	4
The optimal solution for service organizations .....	4
Resource Tracking .....	5
Service Contract Management .....	5
Mobility .....	5
Dispatch .....	5
Work Order Management.....	6
Robust integration with your Kinetic system .....	6



# ***Field Service Management (FSM)***

***Harness the power of a complete field service portfolio to centralize and optimize your activities in the field***

At the core of any service-centric company is an intuitive, centralized solution- fit for the modern requirements to compete in today's complex service environment. Features that were once considered "nice to have" are now regarded as essential tools for both industry leaders and their customers.

Epicor Field Service Management (FSM) addresses these challenges head-on. With an intuitive interface that brings speed, efficiency, and enhanced communication to your fingertips, FSM allows manufacturers and distributors to exceed their customers' expectations for their service needs.





## The need for cutting edge field service is increasingly paramount, exemplified by everdeveloping industry trends

The field service industry is experiencing rapid growth due to the prevalence of interconnected, digitized processes within the context of mobile service.

Modern technologies are impacting the service industry. The adoption of IoT, remote field force monitoring, realtime notifications, and the usage of augmented reality as service support is accelerating in field service solutions across the industry.

Additionally, mobile field service has been hotly discussed for some time now. Access to mobile technology and other similar devices is now considered an essential component of the modern arena rather than a helpful optional extra.

IoT Integration in Field Operations: IoT technology has aided field service firms in improving real-time communications, scheduling, reporting, and supplying them with essential data for analysis.

Driving towards greater customer-centric strategies, companies have adapted to remote work by offering clients new services like online appointment booking, video chat assistance, contactless delivery drop-offs, and different ways of communicating on various platforms. Currently, customers are accustomed to having more choices and convenience at their fingertips; therefore, the presence and expansion of such services are critical.

## The optimal solution for service organizations

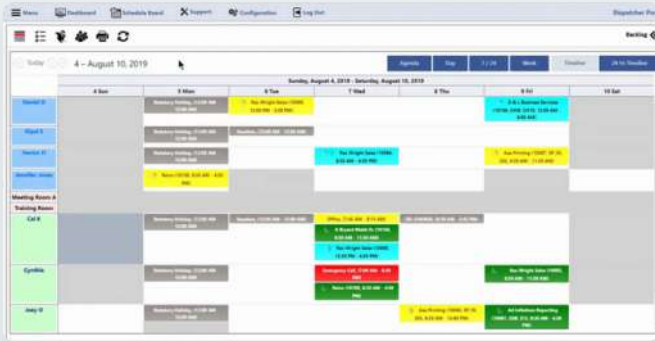
Epicor Field Service Management (FSM) was designed for manufacturers and distributors that use mobile field resources. The tool allows companies to connect with their customers and their customers' equipment while automating and streamlining the service process.

The solution allows customers to save time and make better informed decisions with quick access to customer information, equipment service history, and technician availability & skill level. FSM addresses many business challenges, including:

- Relaying service details to the finance department
- Providing repair service in a timely manner
- Installation of equipment
- Tracking revenue and cost by service project
- Centrally dispatching and scheduling a mobile workforce
- Keeping track of mobile technician's activities, locations, and skill levels

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 IoT data, and real-time updates allow customers to take field service activities to a higher level.



The dispatch calendar screen serves as the beating heart of the scheduling solution. Users can save significant time and reduce scheduling errors by using the intuitive drag-and-drop interface.



## Resource Tracking

With FSM, you can manage information about their field technicians' qualifications, skill sets, and other certifications. With the solution, schedule work in advance and intuitively assign the right resource for the right job. Users can then report on individual performance around utilization and evaluate adherence to budgets and job estimates.

## Service Contract Management

Track and manage complex contracts for customers with ease.

- Connect the contract to a time period, location, equipment list, or any combination of these.
- Manage service activities across multiple locations and all equipment for a customer with blanket contracts.
- Automated billing for the contracts and related services allows users to focus on completing the job and meeting Service Level Agreements.
- The Contract Planning tool makes creating a new contract fast and easy.

## Mobility

FSM runs in the cloud and is completely mobile-enabled. All users access the same data in the central database, so everyone sees updates in real-time. Equipment

installers, facility engineers and service technicians can operate the easy-to-use system on any mobile device or laptop. Native controls make the mobile user experience easy to manage for inspections, signatures, approvals, completions, work orders, and follow-ups.

## Dispatch

Dispatchers can save time and make better-informed decisions when they have customer information, equipment service history, and technician availability and skill sets at their fingertips. If you schedule a handful of calls or dozens of calls per day, you can save significant time and reduce scheduling errors by using the intuitive calendar interface with multiple views.

Users can filter by dispatch location, by individual technician, by skill, or by call type. The Agenda presents multiple appointments on one screen. Alternatively, users may use the Day View, Week View, MonthView or the unique and intuitive Timeline view. Whatever perspective customers need, dispatchers can find it, configure it, and default it.

## Work Order Management

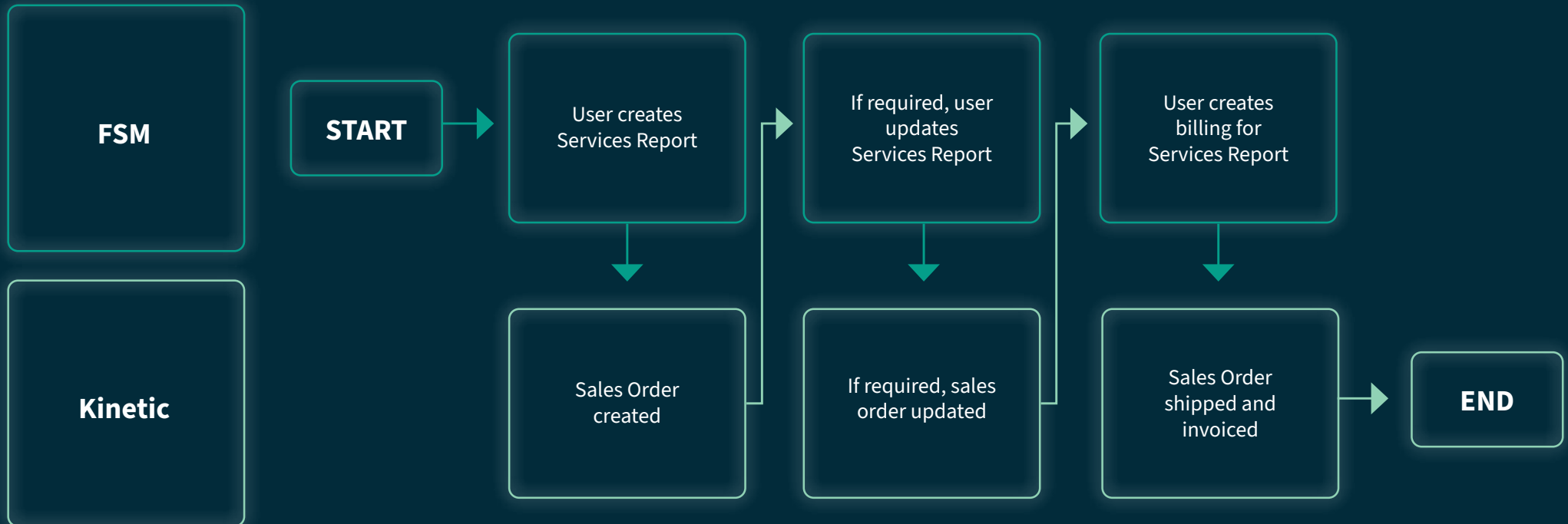
Service Work Orders are used for data collection for all materials used in repair and service, as well as for labor and billable expenses. FSM is configurable to provide the automation and validation that customers desire by using default and calculated values to save data entry time. Gauge your profitability in real time at the Work Order, Contract or Project level, and report on technicians' utilization rates and track costs against budget. Updates occur in real time from any computer or mobile device.

Eliminate paper-based checklists with our User Defined Configurator to create customized and automated checklists. Techs follow and document procedures, while the checklists walk your techs through defined processes and make sure that the job is performed and documented completely and accurately.

## Robust integration with your Kinetic system

Epicor FSM extends the functionality of the Kinetic software to enhance the specific solutions that field service managers need to be successful. It has tight integration hooks with your Kinetic system, giving your staff a seamless experience when it comes to critical dispatching, scheduling, billing, and traceability functions.

The below graphic showcases the typical workflow performed between FSM and Kinetic.





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

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