

Product

- ▶ Epicor® iScala®

Benefits

- ▶ Balance technician workloads to maximise productivity
- ▶ Improve fix times through better visibility of historical information by service personnel
- ▶ Simple access to real-time and historical financial and operational reports/information
- ▶ Help increase cash flow by shorter closure-to-invoice times
- ▶ Create new and/or maximised services revenue, by prompt and accurate billing of contracts and Time and Materials pricing
- ▶ Improve customer satisfaction by better product life cycle management
- ▶ Help increase asset life, reduce downtime and reduce costs by effective preventive maintenance scheduling
- ▶ Improve field personnel productivity via anywhere, anytime, any-device mobile access

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

Epicor iScala Service Management is a comprehensive, service management and scheduling application that helps organizations improve their inhouse and mobile field service workforce efficiency and productivity.

Many companies focus on offering a quality customer service to retain customers. With ever-tightening margins, an effective service management platform can also be a revenue generating centre. This means that sales opportunities needn't stop at the point of shipment to your customer.

Service Management Overview

iScala Service Management manages all service and repair activities and processes, whether the faulty item is under warranty, on contract, or an internal asset. From customer request, to completion, then invoicing, and reconciliation, it helps efficiently manage work flow, revenues and costs.

As well as customer items in the field, service management can operate with stock items, assets in the Asset Management module, or machines and tools used in Epicor iScala Manufacturing.

The Epicor iScala Service Management module was designed with a wide range of service organisations and requirements in mind, encompassing:

- ▶ **Field Service;** gives management, dispatchers and engineers the information they need to optimize personnel and resources--improving customer service levels, and manage material ownership with correct and timely accounting in your ledgers
 - being mobile enabled, engineers can access all the information they need, to plan and prepare for each job
- ▶ **In-House Repair and Maintenance;** its sophisticated functionality manages any repair or swap process, ensuring correct stock valuation
- ▶ **Preventive Maintenance;** enables forecasting and scheduling jobs (labour, cost and materials) for all quantity and time-based incidents
- ▶ **Inhouse Asset Management;** provides the functionality for planning and creation of service orders based on the defined maintenance cycle of your machines (defined in Epicor iScala Manufacturing)
- ▶ **Resource Management;** manages the planning and allocation of resources via calendars, skillsets, qualifications, address, type, location, and even training management
- ▶ **Financials and Analysis;** offers detailed reporting of resources and materials, revenues and costs, key service metrics, cost versus revenues of contracts and warranties, and much more

Service Management Flow

There are four main functional areas within Epicor iScala Service Management, namely:

1. Service Order Management

A service request will result in the creation of a Service Order, for a Service Object. This identifies the incident and its dependencies, e.g. customer, site, invoice/contract, service object, configuration, serial number(s).

The serial number can be used to see if it is under contract or under warranty. The system can show any contractual response/reaction/resolution time commitments. Historical transactions and activity are also clearly visible, to aid resolution actions.

The person logging the incident can register commitments to the customer, that can be viewed by the engineer:

- ▶ ETC (Estimated Time to Call Back)
- ▶ ETA (Estimated Time of Engineer Arrival "start")
- ▶ ETR (Estimated Time of Return "solved")

The system automatically calculates the system priority based on predefined weighted percentages of order priority, customer priority and service object priority. However, the user can select priority based on their own knowledge and experience of the customer.

A built-in knowledge-base, check-lists etc, historical information, etc., can help resolve Service Orders at point of logging. Related documents can also be emailed to the customer.

2. Planning, Dispatching and Reporting of Actuals

Service Order Monitor tool is used to assign resources for a specific job, based on predefined skill sets and default engineers for certain tasks.

Part of the dispatching process is to check the material availability and various delivery options--the Service Management Solution integrates with Epicor iScala Logistics and MPC.

The task scheduler then sends the allocated task to the engineers with all necessary information. The engineer can view all information required (including picking lists), with the option of mobile device access.

After resolving the problem, the engineer identifies material quantities, time spent and other costs in the system--lines can be added for unplanned activities and material. It is possible to adjust configuration changes, serial numbers or batch allocations as well as serial number history information

3. Invoicing

The system automatically allocates a proposed invoice customer on line level to define who pays for what part of the service, depending on warranty or contract rules.

The accounting/invoicing department can verify and adjust the actuals reported and adjust invoice rules and quantities if required. They can also upload other ledger costs from 3rd parties such as suppliers, outsourcing companies and sub-contractors. The Invoice Proposals can be printed and sent to the client, closing the service order. All information is moved to the service history.

4. Service Order History and Statistics

Service Management has a history file for all service objects, that service engineers can simply use to assess historical information to effect a faster resolution.

The Service statistics allows you to view work load, order summaries, time spent on jobs, gross margins on performed services and much more. You can also design your own statistics by using provided templates.

Detailed analysis and post calculation between planned, actual and invoice figures for quantities, cost and revenue are provided based on stored statistical transactions. Depending on business needs, financial actual figures can be posted to the ledgers. There is a large variety of setup possibilities available, cost accounting, accrual accounting, (GIT) work in process accounting, value/date stamping for currencies (FASB52). This enables continuous monitoring possibilities on the financial ledger level.

Key Features

- ▶ Service contracts link
- ▶ Rental and leasing contract link
- ▶ Helpdesk tool
- ▶ Master and sub-order relationship
- ▶ Resource skill set selection
- ▶ Credit check
- ▶ Warranty detection
- ▶ Sub-contractor cost up-load
- ▶ Training planning and execution
- ▶ Service order management
- ▶ Cost, time and activity planning/reporting
- ▶ Counter based maintenance scheduling
- ▶ Service, transport and export documents
- ▶ Attach Technical bulletins to products and orders
- ▶ Attach Checklist to job
- ▶ Invoicing
- ▶ Status management
- ▶ Escalation procedures
- ▶ Monitoring of service orders
- ▶ Drop shipment handling
- ▶ Material swap
- ▶ Configuration history and change management
- ▶ Serial number handling
- ▶ WIP accounting
- ▶ FASB 52
- ▶ Batch control and traceability
- ▶ Service history and statistics
- ▶ Reporting and Analysis

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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