Epicor

Mobile Sales Assistant

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Epicor Mobile Sales Assistant is an enterprise mobility solution for sales and distribution. It provides complete sales and fulfillment workflow from quotes and orders to inventory management, payment and proof-of-delivery. Epicor Mobile Sales Assistant includes standard workflows such as customer maintenance, customer history, replenishment, comprehensive product pricing, and taxation schedules. Bar code enabled mobile devices automate the scanning of pickups, deliveries, stock-taking, back orders, and returns with portable printing solutions or automated PDFs sent direct to the customer from Epicor.

Like all Epicor Mobile applications, Epicor Mobile Sales Assistant is fully integrated with Epicor ERP products, but can operate independently with or without a connection to the Internet. Once a connection becomes available, transactions synchronize seamlessly between the mobile device and change to Epicor ERP.

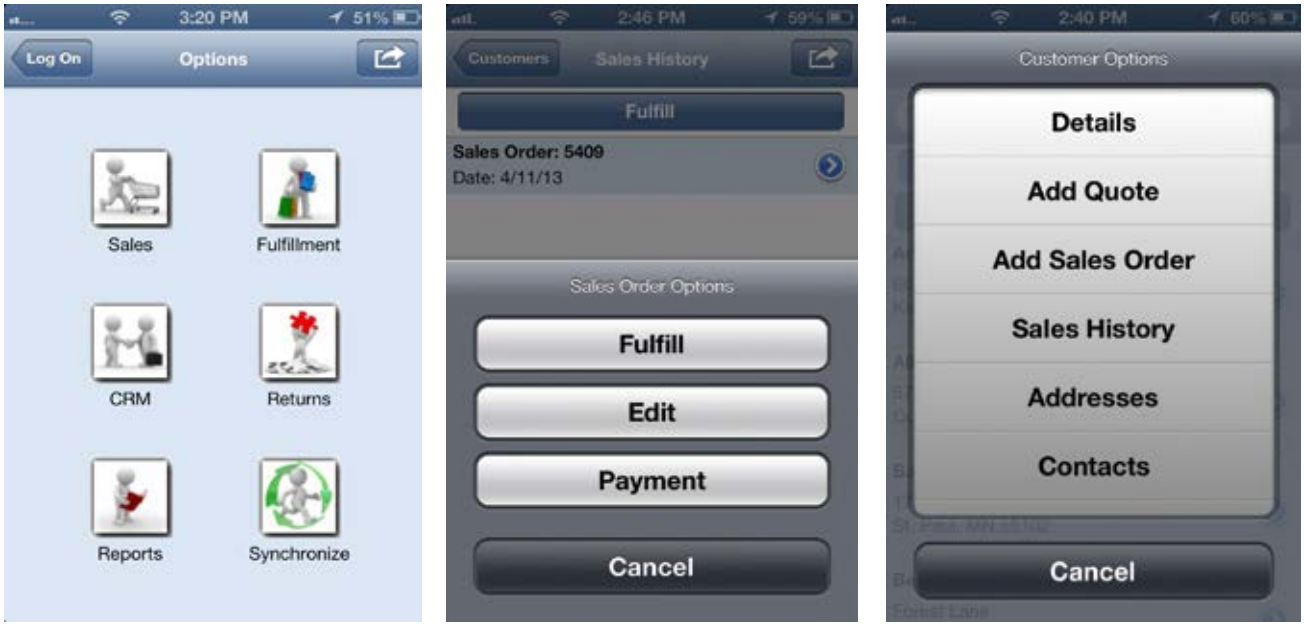
You can use Epicor Mobile Sales Assistant with Apple iPhone, iPad, Android™ phones and tablets, and Microsoft® Windows® mobile devices. This provides you the flexibility to use the right device for the right environment and still provide the same easy-to-use application.

With Epicor Mobile Sales Assistant, your sales force and back office can collaborate more productively, be more responsive to customer needs, and provide superior levels of customer service.

Maximize Quality of Service

Epicor Mobile Sales Assistant is the solution for organizations that want to maximize the productivity and customer satisfaction of their sales staff. Mobile Sales Assistant keeps sales focused on the job at hand and takes care of the administrative tasks by:

- Providing real-time access to Epicor business systems
- Shortening the order to cash cycle
- Reclaiming time previously lost to travel and connectivity issues
- Assisting deeper business relationships through immediate access to information
- Allowing immediate action on opportunities
- Increasing the accuracy of data capture
- Allowing sales to transact business where it happens, regardless of location or connectivity



The Epicor Mobile Sales Assistant main menu provides access to the key functions including quoting, order processing, fulfillment,and payment.

Sales gains access to CRM data with the ability to update or correct this information on the mobile device. Management can control processes related to territory, product, delivery, and inventory which will improve compliance and accountability without compromising responsiveness.

Sales Assistant solves other key problems in sales and fulfillment including accurate recording of deliveries, RMAs, travel, and expenses.

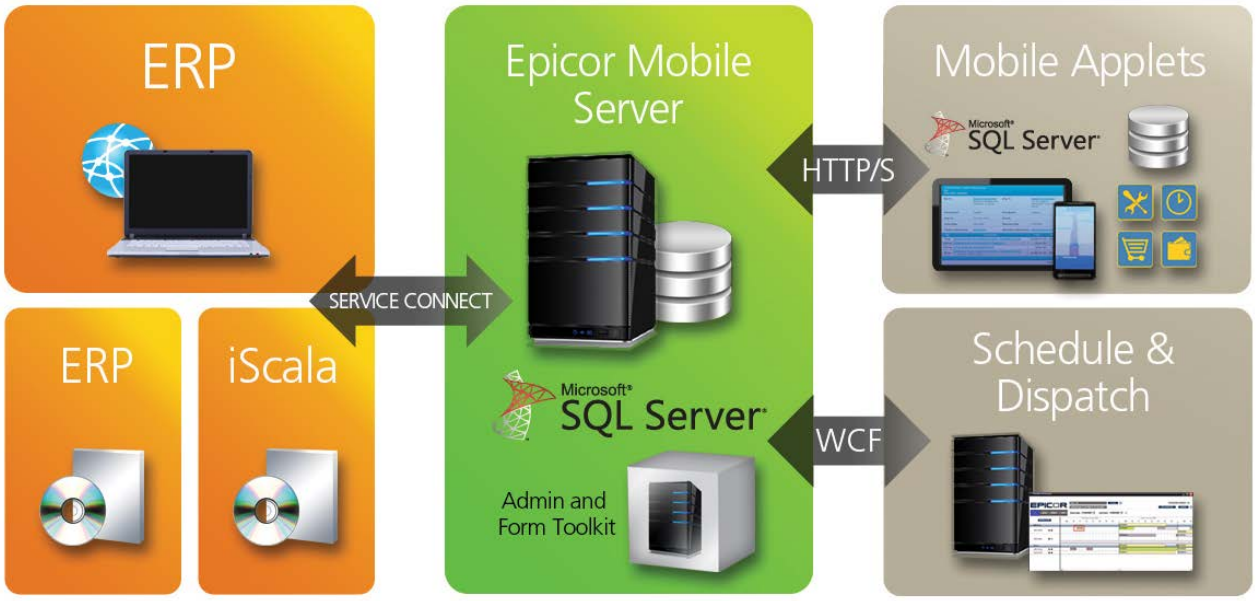
Sales Assistant is used in a variety of industries including retail, merchandising, distribution, field service, and logistics. On top of the other challenges facing manufacturers of fabricated products, a new set of governmental and industry mandated regulatory requirements that demand tight control of manufacturing process and traceability along with strict business practices are further stressing organizations. From Sarbanes-Oxley to ISO/AS/TS/QS standards, today's manufacturer is faced with challenges that eat at the bottom line of their profits. The Epicor robust infrastructure coupled with its comprehensive quality suite offers a comprehensive approach to automating the compliance process.

Architected for Efficient Mobile Sales

Sales Assistant is much more than a simple mobile application. The industry-proven Microsoft three-tier architecture and database synchronization technologies deliver true ERP functionality to the hands of mobile users with the reliability and 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 the data they need to service their customers and collecting the data required to complete the quote/ order/fulfillment/payment transactions.

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 Internet connection is lost. The mobile device provides the sales staff with an easy-to-use window to the relevant functions of Epicor, using a configurable workflow, simple screens with easy-to-use data entry features and wizards. This is coupled with sophisticated data integrity and business rules enforcement policies.



Sales Assistant 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 sales and fulfillment can be sent into the field securely and efficiently.

Typical Usage Scenario

Mobile sales are typically allocated territories and product sets. They arrange appointments with customers and prospects to identify sales opportunities and convert these opportunities into sales. They may also be able to fulfill sales orders and accept payment for the goods and services they have sold.

When a user logs on to the Sales Assistant application, they will synchronize their specific database of customers, prospects, and products to the mobile device.

The database will provide current stock and pricing information for products, promotional offers, and CRM data on each customer. This data can be updated on the mobile device whenever there is a connection between the mobile device and the ERP.

In the field, the user can progress sales opportunities:

- New prospects and opportunities can be identified and their details captured. Similarly, changes to key points of contact or commercial protocols can be recorded and updated to the ERP.
- New quotes can be created for a customer or prospect, or existing quotes can be edited using the product list and sophisticated search and selection features or by using bar code or RFID scanning of product catalogs.

As the quote is built up, pricing and taxation calculations manage business rules such as value or volume breaks, promotional pricing, and trade agreements, or similar discount structures.

Quotes can be converted into sales orders, or sales orders can be created, using the same simplified user interface and workflows.

Stock commitment and delivery commitment can be made based on the 'near to real time' data available on stock levels in various warehouses and delivery capacity. Orders can be confirmed and the customer signature recorded to the order, quote, or invoice.

The mobile user may also fulfill orders, issue invoices, and accept payment:

- If the sales person has sufficient stock on hand to fulfill the order, the products can be delivered to the customer with the movement of stock tracked by Sales Assistant.
- If required an invoice can be generated on-site using e-mail or portable printer. Alternately, the customer may be supplied on account and an invoice issued later by the ERP.
- Payment may be accepted by Sales Assistant using credit card, check, or cash payments (and any combination of these). In addition, payments for outstanding invoices may also be accepted. A receipt for the payment can be generated using e-mail or portable printer.

Form Builder Toolkit

The optional Form Builder Toolkit is available for defining forms for insertion into the mobile application workflow. Custom forms configured by your system administrator or by Epicor give you the ability to tailor the Sales Assistant solution to suit your specific requirements.

Custom forms and check lists can be created and inserted into the mobile application workflow for collecting data that relate to the customer or their purchases. Data collected in these forms is synchronized with Epicor ERP using Service Connect.

Key Features At a Glance

Mobile users need sophisticated functionality presented in a simple, easy-to-use workflow. Sales Assistant provides powerful functionality for a variety of areas including:

Territory and account management

- User login and data filtering of customers and products to match user profile
- Navigate to appointment with GPS mapping services
- View customer details, site details
- View key point of contact information
- View customer history (orders, quotes, invoices, and payments)
- Capture updates to opportunities, calls, and cases
- Capture up-sell opportunities
- Forecasting/pipeline update and views
- Create suspects, prospects, and customers
- View/update task and milestones

Order fulfillment

- Deliver products and services, with simplified data entry methods including bar code, RFID, pick lists, and 'Touch Screen' features
- Transfer inventory to sales order from multiple warehouses/stockpiles/other vehicles
- Record expenses and time
- Record customer signature or Authority to Leave
- Record back orders/partial fulfillments

Quoting and order processing

- Product, order history, and customer
- Simplified data entry methods, including bar code, RFID, pick lists and 'finger friendly' features
- (Near) Real-time inventory and pricelist data
- Alerts for insufficient stock in vehicle
- Stock-taking and replenishment orders
- Sophisticated pricing and tax calculation
- Promotions, trade agreements, customer-specific pricing
- Discounts, volume, and value breaks
- Returns, with bar code scan data entry
- Capture additional data on custom forms
- Specify Terms and Conditions
- Acceptance/completion signature capture with comments
- Stock and delivery commitment

Invoicing and payment acceptance

- Generate invoice (e-mail or print)
- Accept payment (credit card, cash, check)
- Accept returns with optional bar code or RFID of product, serial number, packaging
- Integrate with mobile card swipe device

Expense

- Expense claim form for easy expense capture
- Attach photo of receipts
- Link to job or internal expenses

Reporting

- Export History
- Product Items
- Sales
- Inventory
- Report against revenue and gross margin targets

Configuration and management

- Available on iPhone and iPad through App StoreSM
- Available on Android phones and tablets through Google™ Play
- Multiple Company and Multiple-plant support for one mobile server installation
- Available on Microsoft Windows 8 Phone and Ruggedized devices using the Windows mobile platform
- Customer-configured forms at any point in workflow with ability to populate fields from barcode or RFID scanner
- Remote device management and lock down (optional)
- Separate on device SQL Server database for offline use

For Your Industry

With Epicor you get a partner dedicated to your business success, and who offers you the support you need to make success a reality.

About Epicor

Epicor Software Corporation drives business growth. We provide flexible, industry-specific software that is designed around the needs of our manufacturing, distribution, retail, and service industry customers. More than 40 years of experience with our customers' unique business processes and operational requirements is built into every solution—in the cloud, hosted, or on premises. With a deep understanding of your industry, Epicor solutions spur growth while managing complexity. The result is powerful solutions that free your resources so you can grow your business. For more information, connect with Epicor or visit www.epicor.com.

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