Epicor® Enterprise Resource Planning

EPICOR.

Epicor—Innovation that Inspires

Epicor strives to deliver an entirely new approach to business software. We inspire businesses by offering choices and unprecedented flexibility. Epicor solutions free our customers from focusing on technology to focusing on what they do—their core, revenue-generating activities.

Designed for the unique needs of the manufacturing, distribution, retail and service industries, Epicor provides end-to-end solutions coupled with the technology expertise you need to increase operational efficiency and drive competitive advantage. With more than 40 years of experience in delivering innovative, award-winning solutions to our customers, Epicor is a visionary and stable partner you can rely on now and in the future.

By delivering a complete range of business software solutions along with a single point of accountability, our customers can achieve operational excellence and sustained market leadership.

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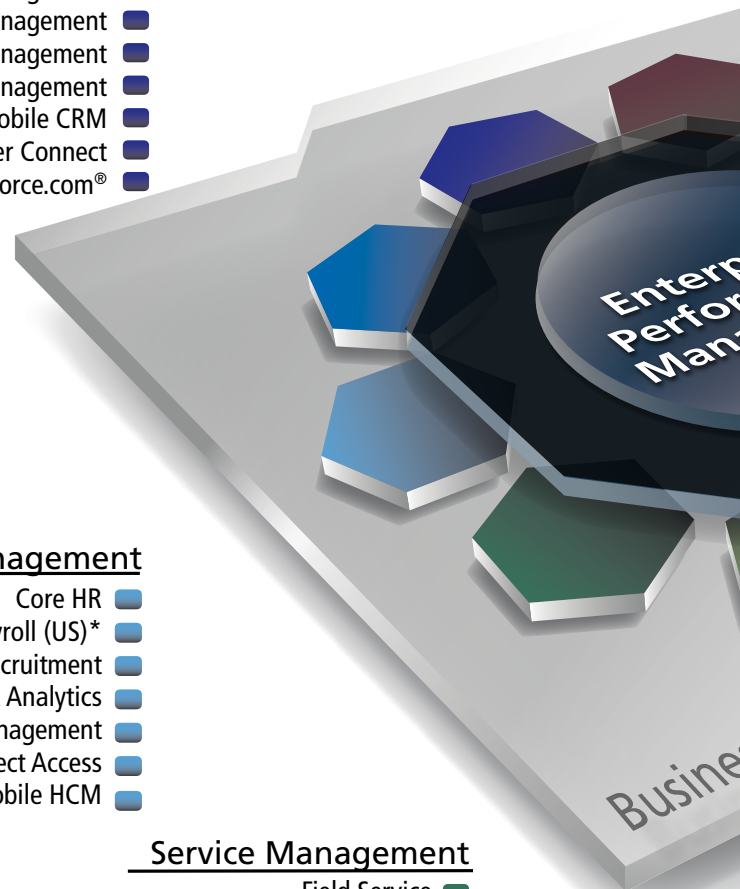
*Available in the US only - please check with your Epicor office for local solutions.

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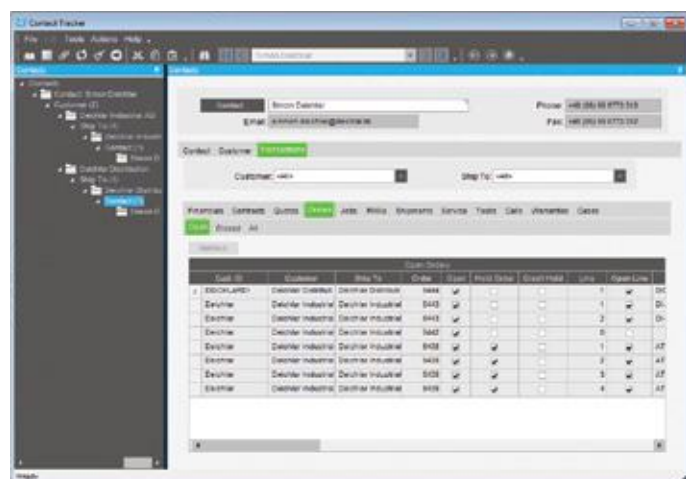# Customer Relationship Management

Customer relationship management (CRM) strategies are as important to business today as they have ever been. We've designed Epicor CRM to help you stay ahead of the curve and successfully meet the challenges that the market brings—helping you effectively manage your entire customer lifecycle from prospect to cash to care, improve operational efficiency and accelerate growth—both internally and externally.

CRM controls every aspect of a company's interaction with its customers and potential customers from generating the lead, developing the opportunity, taking the order, producing and shipping or supplying the goods or services, getting the cash and supporting the customer. Epicor CRM software are designed to a 360-degree view of the entire customer, supplier, or partner relationship. Epicor CRM broadens the scope of customer information to everyone within and across the organization and to stakeholders beyond.

Epicor Social Enterprise (ESE) solutions further enhances Epicor CRM solution, delivering up-to-date contextual information to key stakeholders for the life of the customer relationship. Using ESE, customers, prospects, partners can collaborate with internal information workers to help ensure the highest possible customer satisfaction.

Contact Management

Comprehensive contact management is at the core of any effective CRM solution and makes keeping in touch with your customers and prospects easy by promoting responsive, respectful, and proactive communication. Contact Management enhances your customer service by documenting and sharing customer communication with the entire organization and helps manage contact interactions through task management. With Epicor CRM Contact Management you can improve overall responsiveness and focus by putting your contacts at the center of your business.

Manage every aspect of your relationships with contacts for a more complete picture of customer interactions and for enhanced customer satisfaction.

Contact Information
Store multiple contacts per organization by contact function. Track and report contact communication alongside entire organization activity.

Contact Name Field
Throughout Epicor CRM, the context menu for the Contact name field enables users to create a Customer or Service Call, Case, Lead/Opportunity/Quote, RMA, Sales Order, and Task. Users can also right-click to send an e-mail directly to a contact; the e-mail program also lets attachments be added onto the e-mail.

Social Networking
Use Social Networking to stay connected to business contacts. Epicor includes fields on the contract record to store information like the IM address, Facebook® ID, LinkedIn® ID, and Twitter ID.

Epicor Social Enterprise allows interaction with contacts using social-media concepts to improve communication. If allowed, contacts can subscribe to receive updates about their own customer accounts, service calls, cases, quotes, RMAs, orders or any other changes to their information in Epicor ERP. These notifications can then be shared or re-posted to other people or used as the catalyst to interact more closely with your organization with all interaction stored against the target object (Case, Sales Order etc.) within Epicor CRM.

Unlimited Call Notes
Share information across departments regarding customer inquiries by entering detailed call and communication notes. Easily incorporate electronic communication in call history.

Call History
Maintain detailed call history against contacts regarding new opportunities with prospects or existing relationships with customers and share with the entire organization. Additionally, link attachments to each call record using the Call Log.

Task Management
Easily generate follow-up tasks for key employees when communicating with individual contacts, customers or prospects. Provide each user their own task list that outlines their daily tasks.

Integration With E-Mail
E-mail customer or prospect contacts from within Epicor CRM, with e-mail details automatically stored as a call against the account.

Account Information
Extend contact details to capture, track, and report on customers, prospects and suspects.

Account Hierarchies
Create, manage, monitor, and control account hierarchies to further manage winning customer relationships, with either hierarchical or parent/child structures. A parent Customer Tracker then provides a consolidated view of customer data across multiple customers and the Site/Ship-to tracker is similar in format.

Contact Communication
Use standard editing tools like spell check and formatting to draft professional customer e-mail and letter communications. Use Microsoft® standard cut-and-paste technology to easily manipulate text, and design e-mails using HTML or plain text formats based on the preferences of your audience.

Permission-Based Opt-Out Control
Manage requirements for effective permission communication through structured opt-out controls that are enabled on either a campaign basis or globally for contacts. Additionally, allow respondents to determine whether they receive text or HTML-based communications.

Epicor Information Worker
Synchronize essential Epicor CRM data with Microsoft Office to make sales people more effective. Whether connected or disconnected, the sales staff has full access to prospect and customer information, including sales history within Microsoft Outlook®, Microsoft Excel®, or Microsoft Word. Quotations or estimates generated as Word documents or Excel spreadsheets use data direct from Epicor and update the system as required.

Customer Connect

Epicor Commerce Connect, Customer Connect portal provides interactive customer facing content over the Web. Today's customer requires new access to information. Requirements such as being able to view special promotions and pricelists, make repeat purchases and pay on account are standards to improved customer loyalty and online commerce.

Marketing Management

Seeking new, profitable customer relationships is challenging in today's borderless world. Targeting your customers with the right programs and messages and retaining those customers can be your most powerful competitive weapon. Epicor CRM Marketing Management enables you to measure the success of marketing campaigns, understand your target market, and improve communications.

With Epicor CRM your marketers can pinpoint their targets, capture highly qualified leads and perform cost/benefit and return on investment (ROI) analysis on promotional activities. You can use the campaign manager to track the number of leads, opportunities, orders, and costs per campaign. And, once you have the lead, Epicor CRM helps manage the entire sales process more effectively, with features such as workflow and forecasting.

Campaign Management
Generate and manage a marketing campaign for tracking effectiveness and ROI of marketing programs or individual events.

Establish, monitor, and measure the entire marketing mix for a greater return on investment from marketing programs.

Data Management
Extract marketing lists based on any criteria such as customer type (e.g., suspect, prospect, customer) and other attributes including Standard Industrial Classification (SIC) code, location, contact type, territory, etc. Automatically create telemarketing or sales follow ups. Automatically log an entry for customers when they are included in a marketing list. Marketing list import allows customer and contact information to be imported from external sources. Deduping capabilities allow the management of imported lists and the tidying up of the marketing database.

Customer Relationship Management

Campaign Connect

Campaign Connect makes marketing communication easy by managing the entire campaign cycle—from identifying and importing contacts, to creating targeted e-mails and corresponding Web landing pages. It delivers thorough reporting and analysis tools to help you build more targeted campaigns and its user-friendly experience enables you to quickly and easily implement focused communications and campaigns with minimal training.

Campaign Creation
Rapidly build sophisticated, personalized messages and newsletters for all mass e-mail communications both internally and externally.

E-Mail Design (HTML or Text)
Design e-mail promotions in HTML or plain text formats based on the preferences of your audience.

Web Microsite Design
Build microsites to Web-enable your campaigns, and then gather detailed campaign analysis by monitoring the footprint and click stream of your audience as they step through and link from the site.

Metrics Reporting
Review detailed metrics regarding a campaign, down to the segment or broadcast, including individual response preferences.

Contact Management
Upload and store all contacts in a single universe for easy access and management.

Import Wizard
Use a simple flat file import from a standard CSV or text file format for easy campaign generation. XML web service and open database connectivity (ODBC) imports offer flexibility in data sources.

Permission-Based Opt-Out Control
Manage requirements for effective permission marketing through structured opt-out controls that are enabled on a campaign basis or globally. Additionally, allow respondents to determine whether they receive text or HTML-based communications.

Templates
Produce fast and easy campaigns with a consistent look using standard templates.

Segmentation
Utilize the power of your existing systems to generate more effective campaigns. By responding to previous purchases, requests or general demographics, you can generate targeted campaigns and optimize profits.
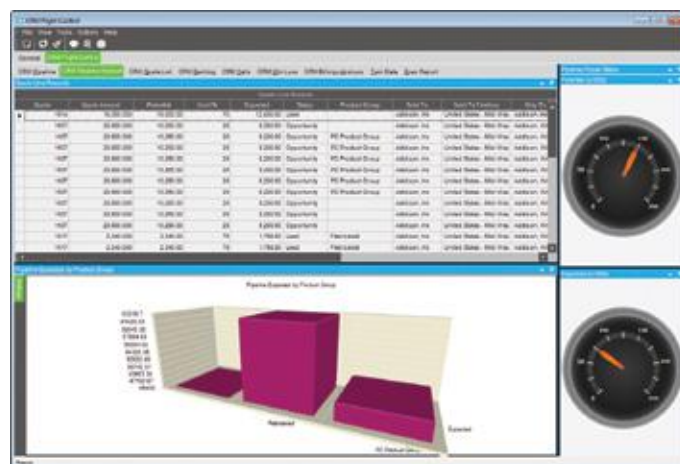
Easily manage leads and opportunities for accurate sales forecasting and pipeline analysis.

Web Design Tools
Create professional looking broadcasts with ease. From banner ads to your custom Campaign Connect home page, your company can utilize the power of Campaign Connect to Web-enable your users.

Lead and Opportunity Management

The primary goal of many businesses is to grow their revenue. Whether your growth will come through attracting new customers or up-selling or cross-selling to existing customers, Epicor CRM solution can help you. With Epicor CRM Lead and Opportunity Management you can proactively manage your sales territories and the entire life cycle of all your opportunities. Lead and Opportunity Management enables you to convert more prospects to customers, target the highest value opportunities, and increase sales revenues.

Outfitting your sales team with advanced, easy-to-use software is not just smart; it's a matter of survival. Epicor CRM is equipped with the tools you need to find more prospects and quickly convert them to satisfied customers. Your sales people can manage the complete prospect-to-customer lifecycle, give accurate revenue forecasts to management and automate many administrative tasks. The bottom line? Better qualified prospects, shorter sales cycles, reduced lead time, and higher revenues.

Sales Team Management
Manage the sales team through a user-defined sales structure, pipeline management, and quota management. Automate key sales management functions such as territory management and region assignment of individual prospects.

Customer Relationship Management

Sales Workbench
Give office-based sales representatives and management a single view of all customer- and prospect-related information. This view helps you manage your pipeline, marketing, telemarketing, opportunities, orders, returns, service orders, contracts, jobs, calls, and tasks, as well as see all related information on a customer—from one place. A work to-do list also helps to ensure that the sales person is working on the right task at the right time.

Sales Workflow
Monitor every stage of the sales process, including parallel processes. Built-in workflow facilities help to ensure nothing is overlooked.

Lead Management
Manage incoming leads and assign to territory sales representatives. Track lead sources to identify successful advertising, events, or other campaign tactics. Analyze return on investment of lead generation activities. Easily convert a lead into an opportunity/quote with Quote Management.

Opportunity Development
Improve sales efficiency with structured sales processes, freeing up sales staff from administrative tasks. From account executive to sales engineer, identify all roles within the sales process and establish an action plan for each.

Quotations
Create real-time quotations from simple requests for services and products using engineering cost structures from existing products, same-as-except products, and new products. Manage quotation changes and re-quote opportunities within the same opportunity.

Social CRM
Collaborate with internal stakeholders and authorised prospects/customers around quotes using Epicor Social Enterprise (ESE) to drive win rates. All interaction around the quote in ESE is safely stored and archived in the Epicor ERP database and easily available for future reference using Epicor Search or using an activity stream viewer in Epicor.

Convert Quotes to Orders
Easily convert an entire quotation to a sales order in one step.

Forecasting
Manage forecasts by opportunity probability, category, and territory. Analyze sales quota and forecast at each level of the sales team.

Performance Analysis
Manage sales teams by analyzing performance at each level of the sales structure, from the region level down to the representative level.

Win/Loss
Analyze win/loss information by sales region, representative, opportunity category, or other criteria.

Epicor Information Worker
Synchronize essential Epicor CRM data with Microsoft Office to make sales people more effective. Whether connected or disconnected, sales staff have full access to prospect and customer information, including sales history within Microsoft Outlook, Microsoft Excel, or Microsoft Word. Quotations or estimates generated as Word documents or Excel spreadsheets use data from Epicor ERP and update the system as required.

Case Management

Case management is an essential part of building better business relationships. Improving the productivity and effectiveness of your support center leads to increased customer satisfaction. Epicor CRM Case Management delivers solutions that help you deliver first-rate service to your customers while controlling costs. The result? A strong return on investment through happy customers who make additional purchases and generate new business through referrals.

From initial call to resolution and follow-up, Case Management provides a customer focused solution for personalized, high quality service. This comprehensive one-stop solution enables your service team to manage current case load and respond quickly to customers for industry leading customer satisfaction. The case management workbench is equipped with time saving links to customer focused activities (e.g., new quotes, orders, RMA requests, or service calls). In addition, there is a search-driven knowledgebase and case-driven workflow for standardizing case resolution.

Case Management is fully integrated with Field Service, part of Epicor Service Management, for easy access to dispatching field activities and providing field service representatives access to online answer books, existing customer field service calls, warranty information, and service contracts.

Social Service
Epicor Social Enterprise allows customer service representatives, field service engineers, other experts and even authorised customers the opportunity to work together to resolve problems, exchange knowledge and close open calls. The Case serves as the reference number for all interaction in ESE whether this is related to the Case directly, a service job or any follow up calls. The information stored against the Case can easily be used to create a knowledge base or information source (such as a wiki) that outlines how the problem or similar issues can be resolved in the future.
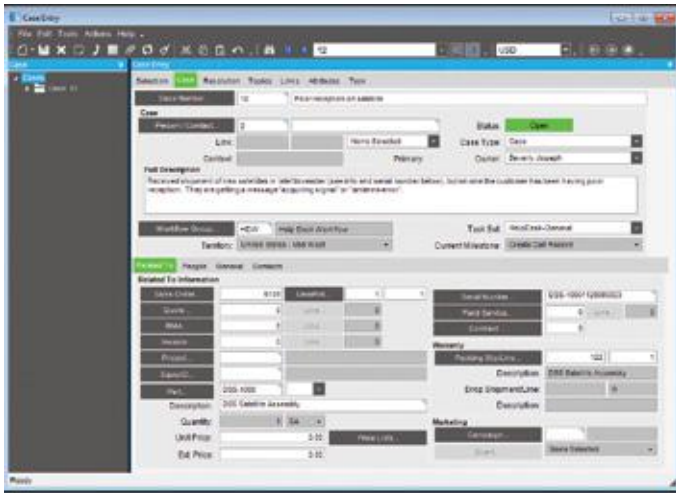
Shorten customer service response time by collecting detailed incident and problem information and initiating appropriate service and support requests to aid effective resolution.

Case Management Workbench

Manage open case load by status (e.g., open or under review) and allow support managers to assign outstanding cases. Review customers, quotes, orders, outstanding returned material authorization requests, field service calls, warranties, service contracts, and cases from a single case workbench.

Convert Case

Easily generate a quote, order, field service order, repair order, job and RMA from a case, bringing the detail of the case and any interaction around the case using ESE into the new document.

Case Context

Use case-specific details (e.g., part number, order number, service call reference or warranty reference) to inquire into and link directly to related information, optionally generating new transactions.

Case Categories

Inquire and report cases by user-defined categories.

Workflow

Monitor every stage of the process. Manage processes using user-defined workflow and assigned roles that are case or issue specific, ensuring standardization of process and that nothing slips through the cracks.

Alerts

Set up user-defined alerts to notify activities regarding service cases to management or specialized service employees.

Online Knowledgebase

Tap into enterprise-wide knowledge documents for fast customer case resolution. Link knowledge documents to cases for analysis.

Contact Management

Manage and record all customer interactions for enterprise-wide visibility of customer satisfaction. Link contacts related to a case for easy review of complete case history.

Communication

Manage and document communication between customer service or field service and the customer for enterprise-wide visibility of customer case and resolution.

Traceability

Link documents and communication events such as e-mails to cases and calls.

Mobile Sales Assistant

Mobile Sales Assistant is an enterprise mobility solution for sales and distribution that provides complete sales and fulfillment workflow for quotes and orders, inventory management, payment, and proof-of-delivery. It is great for businesses who sell from the back of a truck or warehouse. Mobile Sales Assistant includes standard capabilities such as customer maintenance, customer history, replenishment and comprehensive product pricing and taxation schedules. Barcode enabled mobile devices automate the scanning of pickups, deliveries, stocktaking, back orders, and returns with portable printing solutions or automated PDFs sent direct to the customer from Epicor ERP.

Mobile Sales Assistant is fully integrated with Epicor ERP products but can operate independently with or without a connection to the Internet. When a connection is available transactions synchronize between the mobile device and the ERP.

You can use Mobile Sales Assistant with Apple® iPhone®, iPad®, Android™ phones and tablets, and 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 Mobile Sales Assistant, your sales force and back office will collaborate more productively, be more responsive to customer needs and provide superior levels of customer service.

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

Customer Relationship Management

Mobile CRM

Epicor Mobile CRM is delivered as part of the Epicor ERP business architecture and enables mobile sales and service teams untethered access to enterprise data allowing delivery of high levels of customer satisfaction. For salespeople who like to spend more time in front of the customer and less time behind a computer, Mobile CRM enables access to key CRM functions such as customer and contact management, lead management and follow up, estimating and quote management, and case management. Mobile CRM users can even turn quotes into sales orders. Additional CRM capabilities such as product configuration, sales order management, and engineering are available with additional licensing.

Using Epicor's architecture, access to key trackers and dashboards as well as functions within the ERP solution is easy to maintain for optimum accuracy and collaboration around customer issues. Keeping your customer at the focus of your business is easier with mobile workers using real time tools to enable change in the front office, the warehouse, and the plant floor; ultimately driving new loyalty from customers.

Meet your customers where they are; impacting change as it happens to help ensure customer loyalty.

Epicor ERP Integration to Salesforce.com®

Eliminating manual entries of the same data into multiple disparate systems can save time and lessen human error. With the Epicor ERP Integration to Salesforce.com, you can help ensure your contact management system and your Epicor ERP CRM solution are in sync. This module is a true integration between Epicor ERP and your Salesforce.com software as it does not rely on a middleware or another tool.

With the Epicor ERP Integration to Salesforce.com, you can create and manage customer records, contacts, and Epicor parts bi-directionally in either the CRM module in Epicor ERP or in Salesforce.com software. Therefore, any time you alter any of these records in either tool, this module is designed to synchronize automatically, saving you time and preventing potential manual data entry inconsistencies between the two tools.

This module also allows you to flag a "won" opportunity in your Salesforce.com software and it will automatically create a quote in Epicor ERP. It will validate parts and alert you if any of the inventory items from the won opportunity are not loaded in Epicor ERP. You can then maintain the rest of the sales process in Epicor ERP, saving you time and helping ensuring accuracy between the opportunity and the quote.

Sales Management

Epicor Sales Management helps to deliver a comprehensive suite that enables you to produce accurate estimates, streamline your order-to-cash cycle, and fulfill perfect orders that help to ensure world-class customer satisfaction.

By streamlining the sales process with centralized access to product, pricing, and customer information, orders can be generated with a minimal number of steps. Epicor Sales Management automates and improves labor-intensive processes for quoting, proposal generation, configuration and order entry, enabling you to improve sales productivity by increasing accuracy during the quote and order processes, and identifying the right solution to meet customers' needs.

Estimate and Quote Management

Easily generate and track all customer or prospect request for quotations (RFQs), from the time of receipt until an order is placed. You can get quotations out more quickly and be more accurate with pricing and lead times.

Estimating
Calculate material, subcontract, labor, and burden costs for multiple quantities of a part with information from the last time you quoted or ran the part, from a similar part, or from the Bill of Materials (BOM). Add any special charges (e.g., tooling or design). When the order arrives, punch a few keys and the detailed routing will be ready to go to the floor or to make additional changes.
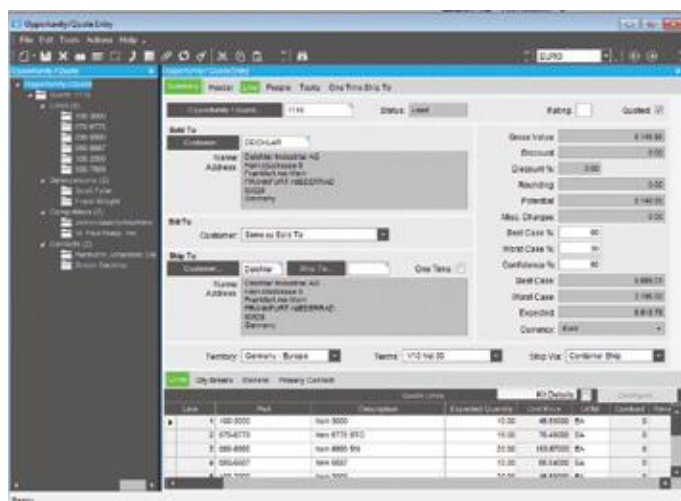
Generate accurate and timely estimates and quotes, and import data from a variety of customer and system sources.

Standard Routings
Pull same-as-except type parts into a quote, then modify them quickly and easily to create a new one.

Pipeline Management
Track confidence levels (e.g., best, worst, most likely) by quote line to accurately predict pipeline activity. Management override optimizes forecast accuracy.

Drag-And-Drop Interface
Use a tree interface to drag-and-drop components, operations or materials from another quote, BOM or previous job.

Realistic Cost Estimates
Perform realistic cost estimating with minimum lot charges, price breaks, and scrap factors on materials and subcontracting.

Inventory Availability
Check inventory availability during quote entry.

Request Supplier RFQ
Create RFQ requests to trigger buyers to solicit suppliers for pricing of materials required in the quote process. Review responses once submitted for inclusion in the estimate.

Markups
Specify and store individual markups for material class, subcontracting, operations, and special costs.

Order/Job Integration
Transfer quote information to a sales order or job. Built with tremendous flexibility, there are multiple ways to process an order and job from an existing quote such as:

▶ Push to an order by the line item

▶ Flag as won, automatically generating an order

▶ Pull from Order Management with flexibility to define specific lines and quantities desired

Part Advisor

Drill down into the quote/job/part status and history to answer critical questions related to a part:

- ▶ Have I quoted it before?
- ▶ Are there current orders for it?
- ▶ Have I run it before?
- ▶ Am I currently running it?
- ▶ Do I have any in inventory?
- ▶ Is part profitability available?

Prospects

Send quotes to prospects, even if they don't exist in the customer file.

Quote Tracker

Instantly query summary and detailed information on an estimate/quote.

Competitive Analysis

Track all competitors to find out where you are winning and why you may be losing.

Workflow

Manage the sales cycle with dynamic task lists that help to ensure the right people are working on the quote at the right time.

Part Cross-Reference

Cross-reference customer part numbers to your part numbers automatically during the quoting process.

Social Estimating

Connect with engineers and other subject matter experts from the field. Epicor Social Enterprise helps to drive more accurate and timely estimates by enabling groups of engineers to be part of a group that sales and estimators can collaborate with electronically. Share knowledge and discuss best options for customers leveraging up-to-date ERP information.

Order Management

Order Management drives the Epicor system. From the time an order is entered, its progress is tracked through final shipment, producing perfect order fulfillment on demand.

With Order Management, all orders and change orders will be effectively managed online, perfecting the order-to-delivery process for maximum customer satisfaction.

Blanket Orders

Establish multiple releases (either firm or not firm) for each sales order line and pull parts directly from inventory. Optionally lock the order line quantity allowing new releases to decrement the final delivery quantity on the final delivery date, keeping the total line quantity in balance with the release.

Credit Checks

Check customer credit status online at quote entry, order entry, and shipment entry.
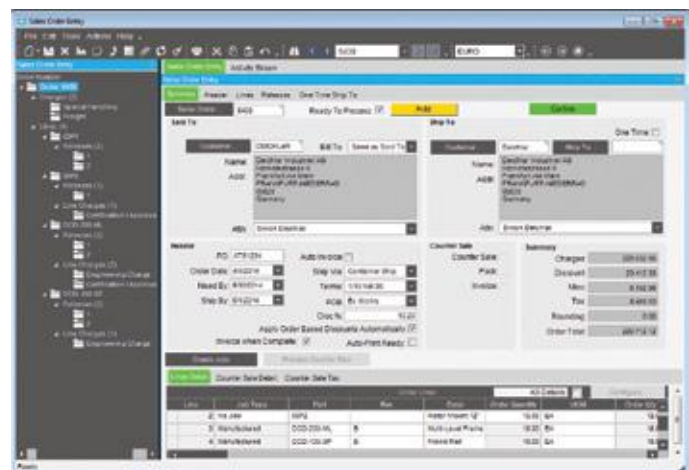
Manage sophisticated sales requirements from the time an order is entered until final shipment.

Multiple Ship-to Addresses

Track multiple ship-to addresses per order release.

Alternate Bill-to and Sold-to Customers

Application for payment may be required from a different customer than the customer order/receiving the goods or bill third-parties, such as a customer of your distributor.

Ship From Multiple Locations

Ship an order from multiple plants and multiple warehouses.

One-Time Shipments

Do a one-time shipment to an address in Order Entry.

Fulfillment and Allocation Processing

Access to fulfillment and allocation processing within sales order processing. Use the Fulfillment Workbench for allocation or reservation and distribution processing, and plan for sales, transfers and job order types. Various fulfillment techniques, such as pick and pack, console-driven, and pre-pack processes may be performed through the use of templates to automate the fulfillment process for each. Hard allocation to finite level, versus reservations processing, may be launched directly from the order, line, and release areas as well. This feature also includes cross-docking capability.

Fulfillment Queue Management

Manage your work queues and assign tasks that are created by, but not limited to, the fulfillment-allocation process. Choose whether the shop floor operates based on paper, or becomes a paperless operation with automatic user-assignments driven by the Material Queue.

Put Transaction Type

This transaction type is for all directed put-away transactions, including purchase order receipts, transfer receipts, RMA receipts and job receipts.

Sales Management

Pick Transaction Type
This transaction type is for all directed pick transactions. This includes sales order picks, issues to jobs, transfer picks, cross docking, and any bin-to-bin movements.

Pack Transaction Type
This transaction type tracks work station loads. During the pick process, the application calculates which suggested work station should pack the order based on load.

Fulfillment Queue Tracker
Use the Queue Tracker to view the status of put, pick, and pack transaction types. Managers can view all shop floor activity or filter on the various queue transaction types, each of which have unique identifiers. Warehouses and bins use attributes to identify what specific transactions need special equipment, and the Queue Tracker assigns only those resources or groups with the ability to operate the specialized machinery. Managers also create resources and groups and assign them transaction types and the priorities in which the transactions should be executed.

Drop Ship and Buy to Order
Provide the ability from within a sales order to define a part as being "Buy-to-Order." This may or may not be defined as a drop ship item. In both cases, the purchase order will be linked to the sales order directly.

Cross-Docking
In conjunction with the fulfillment process, cross-docking provides the ability to directly link future inbound supply of items from purchase orders or jobs directly to demand from sales orders, transfer orders, or jobs. When the cross-docked items are received, they are immediately directed to the demand they are linked to, minimizing the time and task to fulfill the order or job.

Sales Kits
Flexibility in selling items in kits includes configured item kits, optional price rollup and item substitution, mandatory ship complete, and optional printing of kit components on the packing slip and invoice.

Configure Sales Kit Components
Use the answers from the kit master to "on the fly" configure individual kit components, automating kit instructions for features like style, color, and size.

Configure a Kit Within a Kit
Create a kit within a kit. Configure multilevel configured sales kits that include non-stock components generated on a job or purchased direct for the kit, alongside stocked components.

Backorders
Automatically create backorders for lines shipped incomplete. Flexibility enables customer-specific backorder parameters for complete order lines or complete orders to be set.

Sales Commission
Manage sales commission calculations for direct and indirect sales teams. Allocate commission percentage over multiple sales entities per order line.

Price Lists
Generate customer, product group, warehouse, and product-specific pricing hierarchies, while matching the end-user currency. For global enterprises, company, plant, and warehouse pricing offers flexibility in pricing products.

Up-Sell, Cross-Sell, and Down-Sell
Improve order accuracy and ability to enhance sales with Up-sell, Cross-Sell, and Down-sell capabilities. At time of sales order entry, users are prompted with suggestions for "Upgrades," "Downgrades," "Substitutes," and "Complements." Whether substituting the original part with an upgrade or downgrade or adding complementary products; improved customer satisfaction alongside enhanced sales is the return.

Order-Based Discounts
Apply order-based discounts on an order value or product quantity basis. Optionally override and lock pricing.

Miscellaneous Charges
Enter unlimited miscellaneous charges or credits on each order header or order line. These charges will then print on the order and carry over to invoicing.

Order Tracker/Monitoring
Use order tracker to see a summarized view of the order, then drill down on selected items to see greater details (e.g., lines, releases, shipments, charges, bookings, audit, and payment information). Use real-time data to link to other parts of the system.

Easily monitor sales activity with Epicor Social Enterprise.

Sales Management

Social Sales
Monitor/track changes to orders using Social Enterprise. Easily subscribe to notifications about changes to orders without building Business Process Management (BPM) controls. View a summary of all the changes to the order in an activity stream inside or outside Epicor ERP or receive social media style updates via Email or directly in your browser.

Copy Order and Build Order
Simplify repeat orders with the Copy Order function. Optionally build a new order from history. See previous orders and enter the quantity on the order form.

Capable-To-Promise
Provide accurate, real-time delivery dates to customers when using Advanced Planning and Scheduling (APS). Furnish a realistic promise date to your customer by finding out how a quote would fit into your current schedule.

Multilevel Capable-To-Promise
For multilevel structured products, Capable-To-Promise can be configured to create the sublevel assembly structures in addition to the top level assembly.

Available-To-Promise
View running balances during order entry. Enter a quantity, and the system will find the earliest date that quantity will be available. Enter a date, and see how many parts are available on that day.

Order Job Wizard
Generate appropriate jobs for new orders in a single step that enables the user to create, plan, schedule, and release jobs against multiple lines and multiple releases.

Project Management
Link sales orders, jobs, purchase orders, field service calls, cases, tasks, milestones, and budget information to manage projects.

Counter Sales
Automate the pick-up, shipment, and generation of sales invoices for walk-in customers.

Tax Calculations
Tax calculations and fields are available at the sales order, line, and release levels.

Credit Card Processing
Epicor Credit Card Processing includes easy to use maintenance for initial setup along with a variety of integration points to bring an easily deployable solution to your business that meets the security guidelines as specified in the Payment Card Industry Data Security Standard including securely encrypted account numbers and key management. Epicor Sales Management uses Epicor Credit Card Processing to support authorization with the sales order, reauthorization with the sales order before picking and shipping, and complete or partial funds collected with the sales order.

EDI/Demand Management
Today, all suppliers large and small are facing increased expectations from their customers to have systems in place for immediate response to changes in their demand such as forecast and shipping schedule changes. Epicor EDI/Demand Management secures your competitive edge by incorporating electronic data interchange (EDI) with demand scheduling. The EDI/Demand Management framework leverages the SOA business architecture of Epicor ERP and deep industry experience in EDI to lower the cost of EDI deployment. The framework provides full flexibility and control for setting up customer contracts and handling their schedules once inside the Epicor ERP system, whether entered manually in Demand Management or contained in EDI messages. This helps your company reduce lead time and effort for planning and procurement, thus enabling you to respond on the production floor faster. A wide range of EDI implementation choices are available to match your company's needs, making it possible to preserve much of your investment in EDI setup and existing staff.

Demand Management
A component of the embedded EDI/Demand Management module, Demand Management starts with a "contract" set up per customer with such agreed-upon parameters as pricing, initial demand schedule, and contract end date. The contract is then linked to incoming purchase orders, forecasts, and shipping schedules. These contracts can be managed, and schedules produced, automatically with set periodicities or schedule constraints that match each customer's unique shipping needs. Additionally, as changes happen, the schedules can be updated, and changes matched to existing sales orders, which are then updated accordingly. You can use Demand Management without EDI, and if EDI is deployed, your customers' electronic demand changes are brought in automatically for system review and acceptance into sales orders or forecasts in your Epicor ERP system, according to parameters and tolerances you specify. This is especially important for companies doing business in automotive as well as other industries such as industrial, consumer products, retail, and aerospace and defense.
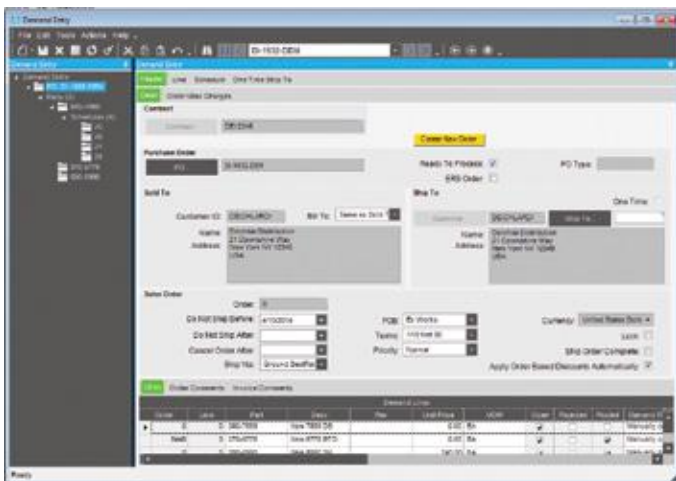
Demand Contracts
Contract structure provides the ability to have many sales orders/lines attached to the contract.

Demand Entry Management Console
Manage one inbound purchase order at a time, or options can be tuned for more automated entry into the Epicor ERP system.

Manage one inbound purchase order at a time, or options can be turned for more automated entry into the Epicor ERP system.

Demand Tolerances

Enter settings per trading partner to include tolerances, such as for allowable time windows when schedule lines can be added or deleted or changed, tolerances for price variations, parameters for matching changes against existing sales orders, and functions for reconciling shipped quantities between you and your trading partner. Automated Demand Management processing can be set to always process in spite of tolerance errors, process with warnings, or stop when an error is encountered.

Demand Mass Review

Use Demand Mass Review to manually match incoming forecast and shipping schedule changes to existing forecasts and sales order lines in the Epicor ERP System. Configurable matching algorithms help speed up the matching process. Demand Mass Review also shows all the demand purchase orders from different trading partners competing for the same part and its on-hand quantities.

Schedules

Manually generate sales order release schedules based on defaulted customer periodicity (interval setup) and release quantity. Automatically close rejected schedules from the customer record.

Schedule Review

Review balances as well as proposed quantity of proposed schedule.

Cumulative Quantities (CUMs)

Manage and reconcile the cumulative shipped quantity. Validate cumulative quantity discrepancies by customer and choose to "Stop" or "Warn" and then allow the received demand to be turned into a valid sales order—this feature includes Cumulative Variances Reporting. The Demand Reconciliation screen helps in the cumulative matching process with the ability to easily make reconciled quantity adjustments. Cumulatives are tracked at the order and shipment levels over the life of the contract.

Forecast

Schedule forecasted deliveries that can be utilized with MRP to predict demand for resources and provide guidance on pending demand for materials.

Periodicity (Interval Setup)

Specify rules by plant or plant/supplier for automatic purchase schedule suggestions. Periodicity rules can be specified as Daily, Monthly Forward, Weekly Forward, and Nth Day of Week.

Capable-to-Promise

Set up the system to review open contracts and capacity requirements for a product and automatically adjust the new demand requirements after reviewing against open contracts as well as available capacity.

Support for Allowance and Charge Codes

Optionally receive and process allowances and miscellaneous charges within EDI transmissions from trading partners. Both flat amounts and percentage based charges are available.

Automated Order Match Validation

Automatically cancel demand releases received that are not matched to a specific order release.

Close and Process Schedules

Use a single step to automatically close and process all schedules within Demand Management.

Contract Start and End

Manage contracts effectively with contract start and end date.

Electronic Data Interchange (EDI)

EDI is the traditional form of exchanging information electronically and is utilized by many suppliers to manage their supply chains more efficiently; reducing the turnaround time for such tasks as schedule changes and additions while eliminating potential manual data entry errors. As components of the embedded EDI/Demand Management module, EDI functions are tightly integrated with Demand Management and facilitate electronic communication of purchase order, forecasts, and shipping schedules from your customers into the Epicor ERP system. In addition, there are EDI functions to not only look at the demand side of EDI, but also focus on the fulfillment side with outbound Advanced Ship Notice (ASN) transactions, which can be reconciled in Demand Reconciliation with Cumulative totals (CUMs) reported back from your trading partner in an inbound EDI document. The rapid and accurate flow of information between your Epicor ERP system and your customer's via EDI will greatly elevate your supplier status.

EDI Standard Transactions

The Epicor ERP system framework readily supports the following listed standard ANSI X12 and EDIFACT documents. Many more are available from the Epicor EDI Solutions Team, who are experienced in making EDI work in various environments and can offer enhanced functionality that is tailored to the EDI needs of your business.

▶ Inbound Documents

  – Purchase Order (ORDERS, 850)

  – Planning Schedule (DELFOR, 830)

  – Shipping Schedule (DELJIT, 862)

  – Change Order (ORDCHG, 860)

▶ Outbound Documents

  – Purchase Order Acknowledgement (ORDRSP, 855)

  – Advanced Ship Notice (DESADV, 856)

  – Invoice (INVOIC, 810)

  – Purchase Order Change Acknowledgement (865)

TIE Kinetix® Software
Epicor has partnered with TIE Kinetix for close to 20 years to help ensure close collaboration during implementation of EDI solutions. TIE's Business Integration products, including EDI translation software, support all industry B2B eCommerce standards, and communication and security infrastructures.

EDI Implementation Options
Epicor takes pride in the freedom of choice we offer our customers for their EDI implementations. Choose the level of assistance you need from the Epicor EDI Solutions Team; such as having them train your team in Demand Management setup and operation and then build and customize all your EDI maps for you to simply training your team on the Epicor solution for EDI so they can self-serve your business EDI needs. Also, in addition to the Epicor offered Tie Kinetix translation software, your existing Enterprise-Class EDI translation software can be used.

EDI Managed Services
Epicor offers its own VAN (value added network) service that supports millions of transactions daily. In addition to this service offering, TIE Hosted Services are available for the EDI message translations. The benefit of combining these solutions includes significant savings in VAN fees and low up-front setup fees for TIE Kinetix translation software. A small Tie Communications package is the only on-premises EDI software needed.

Direct Import Demand Workbench
Import EDI messages from the VAN and translation software directly into the Epicor ERP system without middleware, and review them for errors in a user-friendly format before committing them to your production environment. In the Demand Workbench, easily correct common errors such as a bad contract ID or trading partner ID before sending on for processing.

Acceptance Status
Automatically track functional acceptance status of EDI documents, including acceptance, rejection, and partial acceptance of outbound documents through receipt of functional acknowledgements from trading partners.

Evaluated Receipt Settlement (ERS) or Pay on Receipt (POR)
Improve cash flow by providing ASN data elements required by trading partners for ERS/POR functionality, enabling your trading partner to send back a Cash Application Advice EDI document (REMADV, 820) to process the cash application.

EDI Capable to Promise
Prevent your ERP system from making promises to your trading partner that you can't keep. A very powerful EDI/Demand Management feature is the Capable to Promise function you can turn on for specific trading partners, to first check your available stock and resources against each EDI message that comes in. If not enough resources are available to make and ship the product by the date requested, then the line is optionally adjusted, preventing an inaccurate purchase order acknowledgement from being sent to the trading partner and the costly fines that go with delayed order fulfillment.

Configuration Details
Automatically receive and pass configuration details for configurable parts from automated EDI transactions through Demand Management to order processing.

Automated Order and Forecast Acceptance
Specify customers who can bypass manual review of incoming EDI documents in favor of automated receipt of un-firm or firm orders and changes based on predefined customer attributes.

Service Connect With .NET References for Custom EDI Processing
Epicor Service Connect consists of security, messaging, workflow orchestration, transformation, scheduling, notification, and exception handling, with .NET references and/or web service components. While the Direct Import functionality included with EDI/Demand Management is used to accept EDI standard transactions, Service Connect can be used to set up automated EDI processing for other non-standard EDI transactions.
A runtime version of Service Connect is included with Epicor, or you can purchase a full-developer Service Connect license if you wish to develop your own workflows in-house.

Point of Sale

Staying ahead of the ever increasing expectations of customers and employees in today's fast-paced retail environment can be your most effective competitive advantage. Epicor Point of Sale (POS) is designed to empower your organization with the ability to exceed these expectations, extending the power of your Epicor ERP solution to a customer-facing sales environment. Epicor provides POS solutions to organizations with a single POS station to large, multinational chains with hundreds of stores.

Epicor POS is a feature-rich store system that empowers store personnel to provide enhanced customer experience. Comprehensive functionality include electronic gift cards, gift receipting, customized receipt per transaction type, coupon redemption/issuance, layaways, special orders, suspend and resume, item marking for various functions, additional input fields, multicurrency, start/end of day functions, cash management, and more.
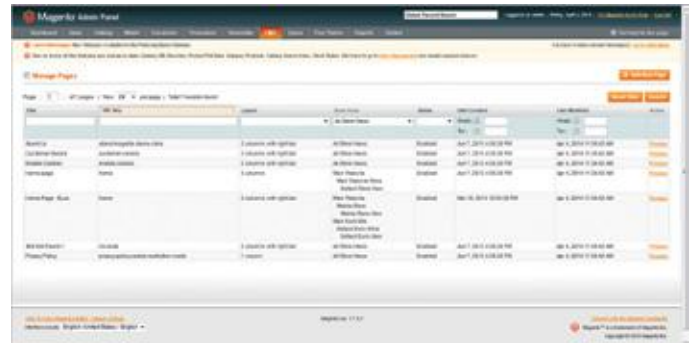
Commerce Connect

The increasing proliferation of eCommerce likely means that more of your customers are looking online to solve their business problems, which means that providing customers with the ability to buy online from you is just a start. Your Web site must provide an experience that truly does solve problems, or better yet, inspires them in some way to keep coming back. Whether your Web site serves Business-to-Consumer (B2C), Business-to-Business (B2B), or both needs, it requires strong functionality and must use the latest technology to deliver customers the best possible online experience. Epicor Commerce Connect provides everything your Web site needs to deliver a rich customer experience, throughout the customer's entire order life cycle—from quote to fulfilment to service.

The key advantage of Epicor Commerce Connect (ECC) is its deep integration to Epicor ERP. Site management—making sure that every part is displayed, listed, and priced correctly to the right customers—can be a complex task that often requires significant resources to manage, and any small errors that occur can quickly lead to customer dissatisfaction. Epicor Commerce Connect negates much of the risk that goes with using a non-integrated eCommerce solution by getting all of its information direct from Epicor ERP. All transactional data flows seamlessly between Epicor Commerce Connect and Epicor ERP: product information, customer specific pricing, inventory levels, and more, can be viewed online via Epicor Commerce Connect.

Epicor Commerce Connect extends business boundaries with a proven commerce architecture that connects your business to consumers, customers, and suppliers. Epicor Commerce Connect enables you to utilize your Web site to drive revenue, increase customer satisfaction, and grow your business. Natively integrated with your Epicor ERP solution, Epicor Commerce

Connect reduces the time to setup a customized, attractive and simple to use Web site. While many companies can provide eCommerce services, very few are able to deliver the value and rapid results the way that Epicor Commerce Connect can.

Commerce Connect provides a rich framework for building a Web presence and simplifies doing business Online.

A Modular Approach to a Better Web Site
Whether you are selling to the general public, or to other businesses, Epicor Commerce Connect has been designed to help you provide all visitors to your site(s) with the same high levels of user experience they have come to expect in today's online environment. Browsing tools such as configurable search, suggested items and automatically updated listings of popular products on your site are able to help your customers very quickly get to the items they wish to purchase, while at the same time ensuring that they are exposed to as much of your product range as possible—all in ways that are relevant and tailored to customer interests.

You can also provide tools to help your customers make better purchasing decisions. For example, letting customers see related products, compare different products or simply view the product up close using the product image zoom-in capability. Tools such as these allow the customer to make better purchase decisions, which in turn lead to much higher levels of customer satisfaction and a lower rate of product returns.

Configurator
Many businesses sell products that can be customized - for example by color, size, material and much more. With products such as these, the number of possible combinations the customer could choose can rapidly rise to the thousands, or more. To help manage this complexity, Epicor Commerce Connect includes a configurator module that provides a fast and efficient mechanism to display all product options on one page —allowing your customers to simply and easily choose their own product specifications without the stress of having to navigate through multiple different pages to find the combination that best meets their needs.

Fully integrated with Commerce Connect, Epicor Product Configurator enables Web-based configurations that can be used for quoting and pricing within the Epicor Commerce Connect solution. Once configurations are accepted by your customer, the instant flow to Epicor ERP enables not only price, but also product build to be delivered for more rapid response to new orders. Use the robust configuration capabilities and extend them to your customers and channel to help ensure that customer requirements are met. Parametric capabilities enable visual confirmation of configuration results.

Supplier Connect

Epicor Commerce Connect can also provide a Web site for your suppliers, providing online self-service on a whole range of enquiries—such as open orders, part information and access to invoice and payment history. This is one way to reduce or eliminate time spent on enquiries that come in via email, phone, or fax, and can significantly increase the amount of time workers have to spend on other tasks. Supplier Connect creates a more seamless relationship between you and your suppliers, and allows for your business to react much more quickly and accurately to any change of circumstances.
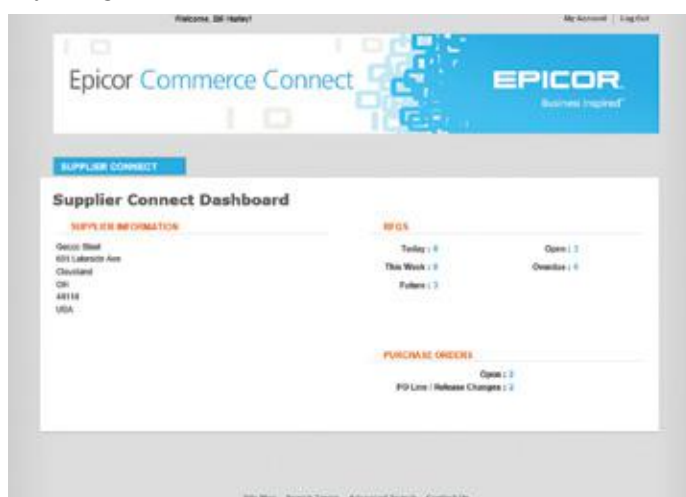
Reduce lead time on purchases by communicating in real time with suppliers on schedule changes, new purchase orders, pricing requests, shipment performance and more—right from your Web site.

General Information page

An informational page with supplier information (based on log in information), including open and overdue request for quotes (RFQs), and the number of open purchase orders and PO line/release changes. Suppliers can manage RFQs and POs from separate pages within the site.

Supplier Account Management

Enable suppliers to manage their own passwords, company information and contact information without the need for over-the-phone assistance.

Purchase Order Management

Suppliers are able to confirm new purchases orders or confirm changes to existing purchase orders.

Supplier Request for Quote

Allow suppliers to respond electronically with pricing for RFQs.

Supplier Inquiries

Save time answering supplier inquiries by letting them access information on parts, open and historical orders, invoices and payments online.

Fully integrated with Your Epicor ERP

An online storefront cannot offer maximum value to your organization unless it is fully integrated to your ERP, and operating these systems independently should not even be an option in today's fast-paced business climate. Epicor understands this challenge well and believes that there is a very real competitive edge to be gained by having tightly integrated systems. Epicor Commerce Connect is fully integrated to Epicor ERP, ensuring that stock information on your site is always up to date, and that any transaction completed online is immediately recorded throughout the business system. Further value of the integration is the avoidance of redundant data entry, which means fewer errors, better accuracy and lower overall transactional costs.

Going Mobile

The ubiquity of smartphone and tablet devices means that your Web site must be able to reach people on the go. Epicor Commerce Connect provides gateways to Android and iOS devices with responsive design that automatically formats your site to the size of the screen, thus enabling fast, efficient browsing, and an optimal user experience on today's most popular mobile devices.

Easy to Extend

Constant innovation, the pace of change and your customer's ever evolving expectations mean that the challenge of providing relevant, fresh online experiences is ongoing. Your Web site is a key part of your brand, is the virtual face of your organization, and is a powerful transaction engine that drives revenue. Epicor has leveraged the power of Magento's world class content management system (CMS) to help you develop unique Web sites quickly and manage them easily. Epicor Commerce Connect allows you to fully exploit the capabilities of Magento's powerful CMS capabilities as well as leverage the full scope of specialized applications available in the Magento App store.

Sales Management

Customer Connect

Business customers have expectations that are influenced by all online experiences, so they require the same ease of use provided by top consumer Web sites. Additionally, they will have other requirements such as being able to view special promotions and pricelists, make repeat purchases and pay on account. Epicor Commerce Connect has been built especially with these requirements in mind and provides frictionless purchasing from your B2B customer Web site.
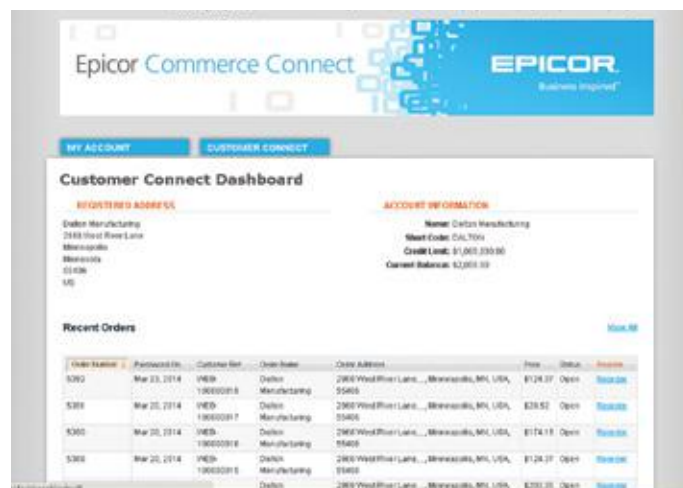
Always a click away, Customer Connect gives B2B customers access to account-specific information directly from your Web site. Whether ordering a replacement part, checking on the status of a shipment, or payment history, Customer Connect extends your level of service to customers.

Shopping Basket
Similar to the "basket" concept used on consumer sites, you can search and add products to the shopping basket and update or remove items. View number of items in the basket and the basket subtotal, and if necessary you can drill down on a specific part number to bring up a new screen with all product information. Once ready, the user can check out through the ship method-billing-order preview-confirmation process.

Product Search
Search will return all items marked as Web Saleable in the ERP and can also be performed by Product Group.

Quick Purchase
Allows the user to key in a part number with quantity and add to basket or add to quick list

RFQ
Customers can request a quote to be created for the information listed in the RFQ form.

Customer History
Customers can view history by order, shipment, invoice, payment, returns authorization, service call with drill-down into the actual transactions.

Human Capital Management

Today's economy demands a more proactive, strategic role for the HR department. Today's managers and employees demand direct access to human resource (HR) systems and information. Epicor Human Capital Management (HCM) software, allows this and more, helping you better manage your globally dispersed workforce, improve human resource processes, and make HR an integral part of your strategic planning.

Epicor HCM is an award winning, intuitive, functional, and adaptable HCM solution. We've defined the next generation of HCM solutions and backed it with the best service in the industry to provide an unparalleled user experience. With Epicor HCM you have the ideal tool to manage your most valuable resource—your workforce—to help ensure your organization's success.

Epicor HCM is designed to automate everything related to HR in a single software system, enabling you to track, manage, and analyze all data for your employees, from application to retirement. Through automated workflow, you improve your efficiency. With powerful reporting and analytical tools, you gain a complete picture of your company's workforce for better strategic planning. With seamless integration to your Epicor or alternative solution, you gain a complete view of your employees.

Usability

Epicor HCM offers one of the most intuitive user interfaces on the market, which enables you to expand use and adoption throughout the organization. Using tabs and drop-down menus, you can instantly navigate anywhere in Epicor HCM; you can launch new activities worry-free with the Epicor HCM auto-save feature; and if you miss a field in a task, Epicor HCM notifies you.

Epicor HCM has a unique home page which is the launch pad for everything you and your users regularly do in the system. HR department users and administrators, business managers, and employees can customize their home pages so that all their data and tasks are right there. With the Epicor HCM home page, everyone can securely get to their assigned tasks quickly and easily, improving overall efficiency.

On their home pages, executives can immediately find the most critical analytics that drive your business; HR can link to commonly used tasks, reports, and to-dos; and managers can open any personnel task they're allowed to perform by clicking on a person summary from a list of their people.


Users have full control over their individual home page enabling them to include the elements that matter to them most, e.g., tasks lists, favorites, workflow assignments, open tasks, and key reports. From the home page in Epicor HCM, you can jump to any other part of the system or any task.

Human Capital Management

Complete HCM Functionality

The HR department adds value to the organization when you can provide assistance on decision making and business initiatives. Access to accurate information is essential. Our human capital management software maintains all your employee-related data in a single database—a true HR system of record that enables you to support your organization's strategic initiatives.

A system is only as good as its output. Epicor HCM comes with over 250 standard reports and flexible reporting tools that enable you to create custom reports. You no longer have to spend time consolidating data from multiple systems to get the reports you need.
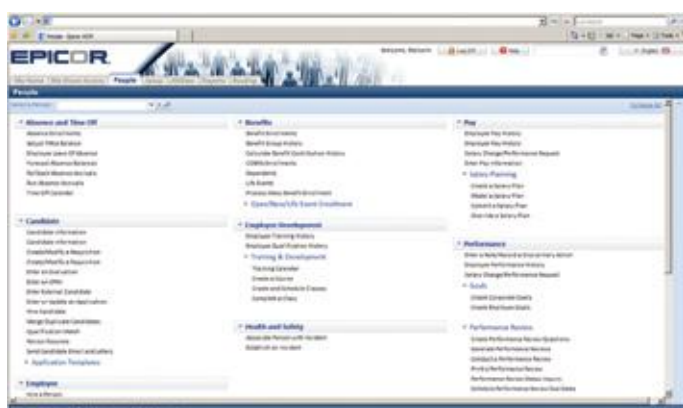
Epicor HCM offers end-to-end HR functionality with an interface that maintains all employee-related data in one area, provides strategic level reporting, and captures the full cycle of information on every resource in your organization.

You need a system that works for you. We designed Epicor HCM to meet all of your needs. Because no two organizations are alike, we've included incredibly easy-to-use tailoring tools in Epicor HCM so you can add fields to the system, change the look and feel of the pages, even create new forms.

Global

Epicor HCM is available via Web-based access worldwide, automatically configuring data fields to reflect the appropriate format based on an employee location. Location-specific home pages deliver a blend of relevant communication and corporate standards at each site. Variable grades, different benefit and absence plans, multiple currencies, additional compensation types, and potentially different data tracking and reporting requirements can be accommodated. Epicor HCM enables employees to see their compensation in local currency or split payments into multiple currencies while maintaining the same information in the corporate currency for ease of reporting and analysis.

Country Specific Functionality and language translation are delivered for select countries outside of the United States.

Recruitment Management

Epicor HCM gives you the tools you need to make the best possible hiring decisions and eliminate paper processes. Intuitive tools assist HR and hiring managers with workflows that walk you through the most common recruiting tasks—opening a requisition, interviewing, and hiring.

Candidate Connect

With Candidate Connect, applicants can view your job postings and read about your company online. They can complete a profile with personal information and competencies, attach a resume and work samples, update their resume and work samples at any time, and apply for multiple positions. With knock-out questions, you can refine the applicant selection process with questions specific to departments or positions. These questions can help HR and managers find the right candidate faster.

Speed Up the Hiring Process

Searching for qualified applicants takes time. Epicor HCM provides powerful tools that help match qualified applicants to open positions, reducing the time you spend filtering through resumes. When a requisition closes, the system automatically notifies all other candidates when you've filled the position. Because Epicor HCM staffing management is part of your complete system, you eliminate duplicate data entry. Epicor HCM seamlessly converts applicant data into employee data when you hire a candidate.
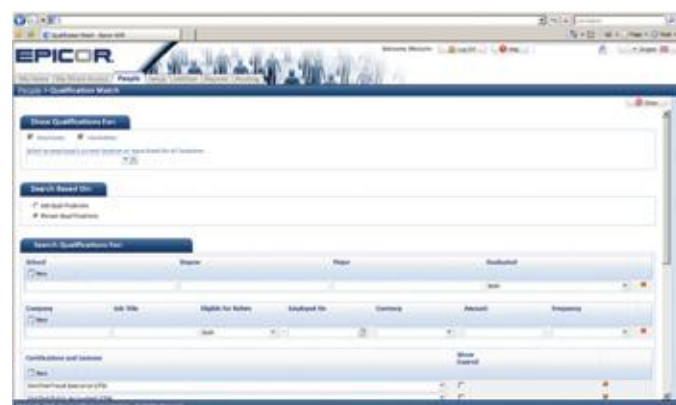
Use Qualification Match to quickly identify potential candidates for open positions.

Onboarding Process

HR can publish all new-hire forms in one location, automate the new-hire benefits selection process, and alert new employees of important dates. To help in the onboarding process, you can publish and manage employee forms in Epicor HCM. Employees can use the self-service features to read and electronically sign these important documents, while HR can track who has or has not signed and manage the entire process with Onboarding Checklists.

Human Capital Management

Key Features

- ▶ Requisition management
- ▶ Job-opening cost tracking
- ▶ Evaluation tracking
- ▶ Drug-test tracking
- ▶ Seamless applicant-to-employee transition
- ▶ Compliance reporting
- ▶ Automated correspondence

Benefits

With Epicor HCM, administering your benefit plans is easy and efficient. You can track an unlimited number of benefit plans and manage complex benefit plans with ease. The Epicor HCM intuitive interface enables benefit administrators to easily input your organization's plans, options, and costs.

Online Open Enrollment

Empower your employees to make cost-effective decisions with online open enrollment. With the optional Employee Connect module, employees can make their own benefit selections and immediately see the financial impact of those changes, on themselves and on the company. Your HR department saves hours of data entry while your organization saves money as a whole. Digital signatures streamline the entire process and make it truly paperless!

Life Events

People get married, have babies, get divorced. When life events make an employee eligible for changing their benefits, Epicor HCM automatically sets up an open enrollment group for those individuals to change their benefit elections. You can determine which benefits they can change, so your organization still maintains control.

Reporting

Most employees don't realize the value of their benefits. With our standard benefits statement, you can help them understand and appreciate your company's investment. Other Epicor HCM standard reports cover all areas from plan utilization and cost analysis to census reporting and billing reconciliation.

Key Features

- ▶ Unlimited benefit plans and options
- ▶ Electronic signatures for benefit changes
- ▶ Easy plan set-up
- ▶ Rules and eligibility criteria
- ▶ Employee enrollment maintenance
- ▶ Alerts on any field
- ▶ Premium payment and employee contribution tracking
- ▶ Benefit cost and usage tracking
- ▶ Separations and continuation of coverage
- ▶ Direct access
- ▶ Powerful reporting and analytics
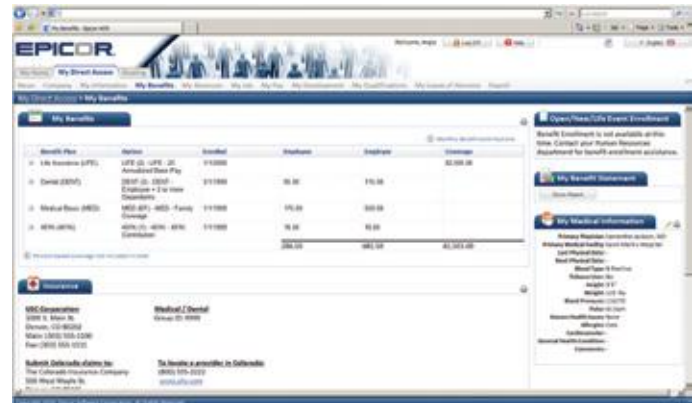
Epicor HCM makes benefits administration easier with simple solutions, such as a data feed to your carriers using a Section 834 format, to eliminate duplicate data entry and reduce enrollment errors.

Absence

The impact and cost of employee absences to your organization is astounding. The absence tracking features in Epicor HCM enable you to manage employee absences online to help control those costs.

Absence Tracking

Using the absence tracking features in Epicor HCM, you can automate your time-off process with multiple types of plans and accrual rates. Employees can view their accruals online and request time-off using the Employee Connect module. Managers can view a graphical calendar of upcoming time-off and past time-off for their staff, and you can use that data to find trends in absences and help manage the costs associated with absenteeism.
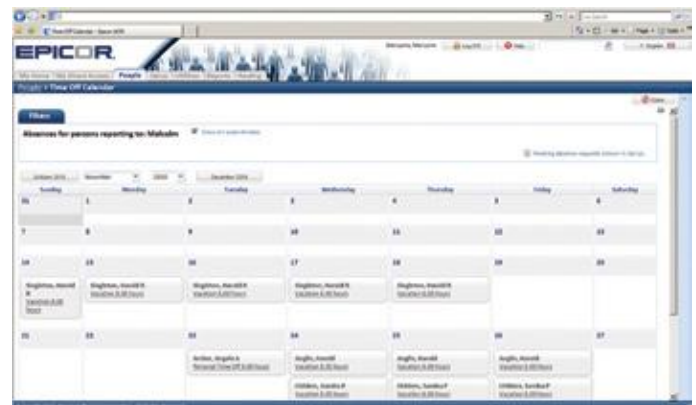
Epicor HCM helps you manage employee absences online for better cost control, employee direct access, and government regulation compliance.

Compliance

Failing to comply with government regulations regarding employee leave can lead to serious consequences for your organization. You can use Epicor HCM to help administer a leave of absence for your employees and prevent unnecessary violations.

Human Capital Management

Key Features

▶ Administer all absence plans

▶ Manage accruals

▶ Manage required documents

▶ Route time-off requests

▶ Analyze absence patterns

▶ Use absence forecasting features to reduce negative balances

Compensation

Compensation expenses typically account for a significant portion of an organization's annual budget, so managing them optimally is vital. Proper planning and management of compensation strategies can help you retain the talent you need and help to ensure your overall success. With Epicor HCM, you can manage all types of pay and an unlimited number of grades and ranges—even allowing for different grade scales at different locations within your organization.

Salary Planning
The Epicor HCM salary planning and modeling tools enable HR to create plans on a defined budget, which managers can use to model various salary distributions among their employees. Upon submission, HR can route plans through the proper channels. Once plans take effect, HR can create a single view of your compensation strategy for the executive team.

Salary Administration
Streamline your salary change requests by empowering managers to request salary changes for their employees through Epicor HCM Manager direct access. Requests can be routed through the proper channels for approval, and use electronic signatures for documentation. Routed requests can even be conditional (e.g., if a change is more than 3%, it requires executive approval; if it is less than 3%, it only requires department head approval) and requests may be edited by the approving authorities during the process.

Key Features
▶ Track any type of pay

▶ Manage an unlimited number of grades and scales

▶ Design scales for geographical differences

▶ Generate budgets

▶ Empower managers to model salary plans

▶ Electronically route salary changes, allowing edits

▶ Create total compensation reports

▶ Design a performance-based compensation package

▶ View actual benefit costs

▶ View snapshots of salary changes, relationships, and over/under budget amounts

Performance Management

Performance management is critical to the success of your organization. With Epicor HCM, you can align corporate goals with employee performance while empowering managers to consistently monitor employee performance throughout the year. The 360-degree or traditional performance reviews facilitate the process of evaluating employees and reduce the cost of tedious paper-based appraisals.

Core Performance Management
With Epicor HCM performance management features, HR can create a core set of questions to assign to the entire organization or to a specific department, location, or job. Once HR establishes those questions, Epicor HCM creates a unique online performance review for each employee based on those criteria.

360° Reviews
Using a 360-degree review, you can obtain a more complete picture of every employee's performance by including feedback from other people in your organization. All parties participating in the review (manager, employee, coworkers) can complete questions online, eliminating data entry for HR and speeding up the entire review process. Participants can also view information such as past appraisals, training and development, disciplinary history, and competencies. Because HR chooses who can see past reviews, the process is secure. When an appraisal is complete, HR can route it electronically to anyone needing to approve or be notified of the review.

Reduce the cost of tedious paper-based reviews with a 360-degree view of performance that encourages consistent monitoring and aligns corporate objectives with the goals of each department and individual.

Cascading Goals
Although employee performance impacts the entire organization, corporate goals drive momentum for individuals. Using Epicor HCM, you can share corporate goals with your entire team and assign portions of those goals to all employees or certain jobs. You can include those goals in performance reviews and rate them accordingly. By improving goal alignment in your organization, you can boost employee morale and measure each individual's contribution to your organization's success.

Human Capital Management

Journaling

When a manager is working on an annual review, documentation regarding an employee's performance throughout the entire year is very helpful. Epicor HCM provides journaling for managers, employees and HR to track month-to-month, week-to-week, or even day-to-day activities. Empower your managers to track both positive and negative information using this great tool that puts the information right where it's needed—in your HR system.

Key Features

▶ Online, paperless program

▶ Traditional or 360-degree reviews

▶ Performance history

▶ Standard review questions

▶ Create department-specific questions

▶ Mass-generate reviews

▶ System alerts of impending reviews

▶ Cascading goals

▶ Journaling

Reporting and Analytics

Powerful reporting and analytical features separate Epicor HCM from other HR systems on the market. The Epicor HCM system empowers you with the tools to analyze the greatest asset of your organization from every angle.

Through graphs and charts, you can analyze applicant and employee data to better manage your workforce and for improved strategic planning. You can analyze costs of turnover and hires, predict effects of salary increases, monitor salary increases against performance ratings, keep tabs on equal employment data, compare benefit programs, and much more. Epicor HCM provides a complete picture of your company's workforce for better strategic planning.

Standard Reports

The standard reports in Epicor HCM are available to every user of the system for all data in the system they have permission to see. Whether an Employee Connect user needs a benefit statement, a manager needs to create a requisition for an open job, or HR needs a complex EEO analysis—Epicor HCM provides standard reports for all of your reporting needs.

Microsoft Report Builder

For custom reporting, Epicor HCM uses Microsoft Report Builder, an ad hoc reporting tool that is both familiar and easy to use with an Office-like look and feel. Report Builder makes it easy to create custom reports and enables any user, regardless of database knowledge, to generate the reports they need. Users can locate data and create new text, fields, and calculations based on that data. They can then format, preview, and print professional-looking reports.

Termination Reasons by Department
Manufacturing

Human Capital Management

Analytics

Epicor HCM incorporates analysis features for data retrieval and analytical reporting. Analytics empower you to quickly find, view, and manipulate the data in your Epicor HCM system. With Microsoft Excel-style pivot tables, Epicor HCM analysis services provide a high-level view of your business data for reporting, online analytical processing (OLAP), data mining, and retrieval of key performance indicator (KPI) scorecards.

Over 250 Standard Reports, including:

▶ Absence Accrued Cost by Department

▶ Annual Recruiting Budget

▶ Applicant Requisitions

▶ Qualification Match

▶ Cost per Hire

▶ Benefit Statement

▶ Benefit Enrollment by Person

▶ EEO

▶ Drug Test History

▶ Total Compensation Statement

▶ Audit Report

▶ US Compliance Reporting

Epicor HCM includes over 250 pre-built reports that follow the permission and security structure within the application so users are empowered with important analytical tools and ease of use.

Training and Development

Developing the skills and abilities of your workforce means reducing turnover costs, improving retention rates and increasing productivity across the board. With the Epicor HCM Training and Development module, you'll grow the capabilities of your future leaders by making ongoing training readily available. This tool allows employees to easily see which classes are required and available, where and when they are offered and allows employees to register for a class and obtain approval from their manager all electronically.

Grow, Strengthen and Prepare for the Future

The Epicor HCM Training and Development module allows you to track a comprehensive training history on your employees so you'll have a better understanding of the knowledge, skills and abilities employees have added to their personal profiles, as well as any additional learning opportunities that may interest them. The future is now and you need to make sure your employees are ready.

Position Control and Budgeting

The Epicor HCM Position Control and Budgeting module lets you manage headcount and monitor funding allocations to better control the "people" budget. Whether it's creating a new position and submitting a request for approval or measuring resources against budgeted headcounts, Position Control and Budgeting allows HR professionals to refine the attributes of a position for better administration of open, filled, and new positions while maintaining tight control on costs.

Timesheets

Managing an employee's work hours or time-off can be overlooked as an area with potential cost savings. Reduce data entry time by empowering employees to be responsible for their own accurate time reporting with the Epicor HCM Timesheet module. Managers can filter the time sheets by those submitted, not submitted or waiting for approval making the time worked approval process more efficient. Then, send the time records to payroll electronically driving efficiency to the payroll process and reducing administrative costs. With integrated absence functionality, even the requested time off is added to the employee's timesheet to further support workforce planning and scheduling.

HCM Link

Connect your processes and protect your data integrity by using Epicor HCM Link to create and manage interface files from the Epicor HCM database.

Epicor HCM Link is an interface tool that allows data to be exported from Epicor HCM into other systems. With HCM Link, you can easily streamline tasks by transferring information via an interface from Epicor HCM to your payroll provider, your benefit vendors or other systems.

Mobile HCM

Today's workforce is on the move so you need tools that will help keep up with managers and employees. Epicor HCM Mobile Connect allows both Managers and Employees access to frequently used self-service tasks from their mobile device.

Human Capital Management

For the Manager

Good managers know how important it is to be responsive to their direct reports. Now, they can respond even faster from their iPad, iPhone or Android devices. Whether they need to verify an employee's time off balance, approve requests for time off, find employee data and emergency contact information or initiate employee changes, it's all at their fingertips.

For the Employee

Employees want information readily available. HR wants to empower them to keep their information up to date. Extend your self-service reach by allowing employees direct access to update their personal data such as address and contact information, view their insurance information, even search the company directory. And now, they can view their time off balances and submit a request for time off when it's convenient for them. Need a reminder? With the mobile To-Do List, employees can add, edit or complete list items, so they won't forget those important things that need to get done.

All these features are enabled with "click to call" so keeping in touch while on the go is easy. You simply deploy a portal and log in through the device's browser. HR doesn't have to support various versions of device applications. No application install is required. Use the Configure Mobile Utility task to personalize your mobile portal, including adding your company image and customizing the menu layout. You can also use this task to control employee access to the mobile portal. So, whether you provide mobile devices or support a bring-your-own-device policy, your managers and employees can complete tasks, view information and access data conveniently.

Employees stay connected with HCM Mobile Connect.

US Payroll

Epicor Payroll is an add-on module for our ERP customers that handles the processing of US employee paychecks and provides the necessary company and US government reporting. With Epicor Payroll, there is no longer any need to have your payroll done with an outside service, when it is so easy to do yourself.

Employees

Set up employees as hourly or salaried. Pay employees weekly, biweekly, semimonthly, or monthly.

Departments/Shifts

Establish home department and shift IDs for each employee.

Tax Tables

Set up federal, FICA, state, local, and other tax deductions.

Pay Types

Maintain regular, overtime, double time, holiday, vacation and sick pay types, as well as unlimited user-defined pay types.

Checks

Preview, print on standard check forms, or reprint if necessary.

User-Defined Fields and Memos

Enter and track fields and unlimited memos for each employee.

Check History

Keep check history indefinitely to help audit unemployment or other claims.

Voluntary Deduction

Define any number of voluntary deductions.

Payroll Taxes

Exclude certain deductions, including health and welfare plans and retirement.

Auto-Pay

Pay all salaried and/or hourly employees with a few keystrokes.

General Ledger Interface

General ledger entries are automatically created through the payroll process.

Third Party Payroll Interface

Having a sound and accurate process to submit payroll to a third party payroll partner is extremely helpful when meeting critical payroll deadlines. With the Third Party Payroll Interface, you have the ability to setup employee pay groups, calculate and edit payable hours, and create a file for submission directly to your payroll processing partner.

The Third Party Payroll interface module lets you configure the pay types, pay classes, and pay frequencies providing for improved productivity when processing your payroll. You also can calculate unique payroll instances such as automatic holiday hours, overtime and double time based on hour thresholds and day of the week designations. The end result is a reduction in time the payroll staff needs to process accurate payroll for your organization.
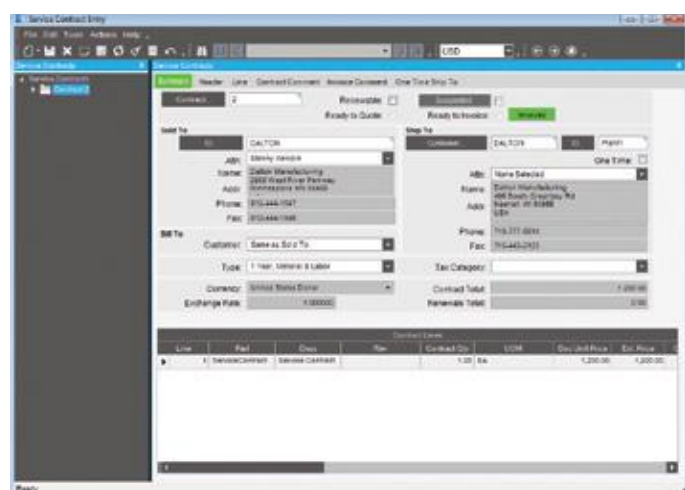
Service Management

Epicor Service Management solution can optimize customer service with timely response to customer requests and puts knowledge in the hands of customer service personnel. Epicor understands that customers want rapid response service. From initial contact with the customer regarding an incident, to in the field operations, to processing returns quickly and efficiently, Epicor Service Management provides the visibility and accountability your business needs.

Contract Management

Epicor Contract Management used in conjunction with Epicor Field Service helps to ensure the timely and accurate execution of service contracts. Additionally, this solution holds the historical activities against the contract to better meet customer expectations.

Give customers fast and effective service with access to detailed information about service contracts and warranties.

Service Contracts
Establish service contracts for specific products, customers, and service level agreements. Each contract has an expiration date that is automatically tracked, reducing manual look-up when a customer calls. Tracking of serialized parts within service contracts is included.

Service Call Center Workbench
Add or update service orders, schedule service orders, execute purchase and material planning, and warranty and service contract management. The service call center workbench also allows drill-down into all associated transactions.

Warranties
Automatically activate warranties, associated with a part or product group upon shipment of a part. When a repair is needed, quickly determine if the problem is still covered under warranty or if it requires a billable service call.

Service-Level Agreements
Generate service-level agreements with automatic billing options.

Field Service

Epicor Field Service is designed for people who install, repair, or service offsite or at the plant or depot. You can centralize all processes related to the dispatching of technicians and cost reporting of service calls in the field. This application supports drop shipment of service parts directly to the customer site. The application is set up for a single interface, so a dispatcher can track all stages of each service call with just a few mouse clicks.

Centralize service call processing with the Service Call Center Workbench.

Inventory Allocations
Allocate inventory from the field as it is needed. Demand is created and all inventory management rules are applied.

Service Call Center Workbench
Add or update service orders, schedule service orders, execute purchase and material planning, and warranty and service contract management. The service call center workbench also allows drill-down into all associated transactions.

Labor Charges

After completion of a job, labor hours and service types are entered into the service call ticket. Depending on how the service call was set up, those charges may be absorbed into the service contract or automatically invoiced to the customer.

Material Charges

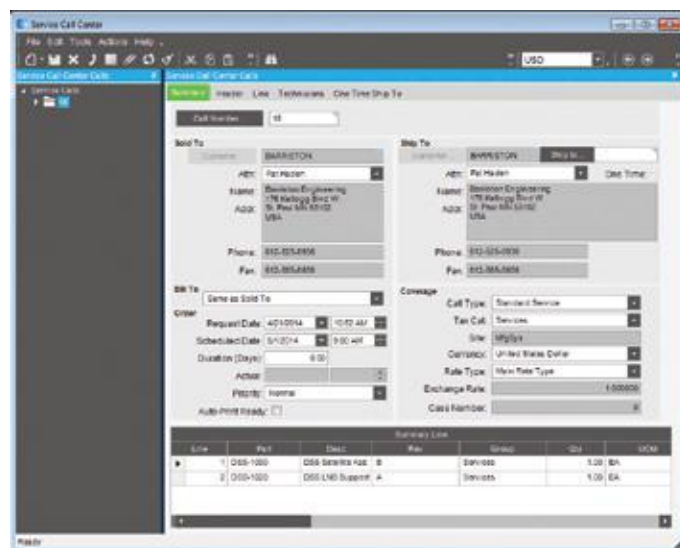As materials are used in the field, they can be entered into the service ticket as incurred costs against the service call. If the costs are billable, the customer is automatically invoiced.

Time and Material Billing

Easily access online time and material cost data and generate an invoice.

Tracking Service Inventory

Perform inventory mass issues to a specific job or repair to quickly relieve inventory of all parts used. If stock is allocated to the field engineer and consumed as needed, stocking locations can be set up and tied to the specific engineer.

Returns

Handle inventory or warranty returns with a simple transaction.

Cost-Of-Service

Access reports providing overall numbers, as well as detailed information on individual contracts and warranties to know whether you are making or losing money.

Automated Dispatching

Automatically dispatch technician and field engineer resources based on availability. If Advanced Planning and Scheduling is deployed, they can be dispatched based on resource capability. You can print a dispatch report, along with individual service tickets, to provide documentation for technicians to take to each job site.

Mobile Field Service

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 Server database

Epicor ERP has the ability to manage work order allocation and scheduling. With Mobile Field Service, your resources in the field and in Epicor ERP will collaborate more productively, be more responsive to customer needs, and provide superior levels of service.
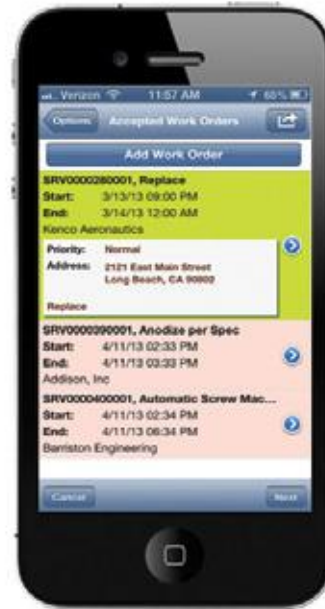
Mobile Field Service provides "in the field" access to enterprise information for improved service.

Case Management

Epicor Case Management is fully integrated with Field Service for easy access to dispatching field activities and providing field service representatives access to online knowledgebases, existing customer field service calls, warranty information, and service contracts.
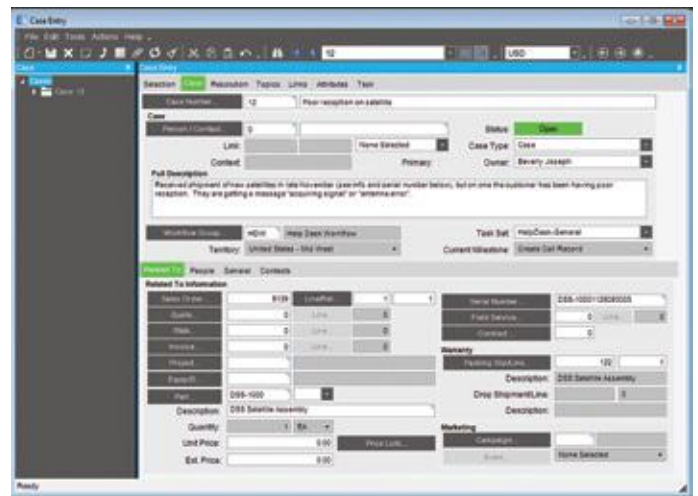
Shorten service response time by collecting detailed product problem information and using the integrated features to initiate requests to the appropriate resource.

Contact Management

Manage and record all customer interactions for enterprise—wide visibility of customer satisfaction. Link contacts related to a case for easy review of complete case history.

Communication

Manage and document communication between customer service or field service and the customer for enterprise-wide visibility of customer case and resolution.

Traceability

Link documents and communication events such as e–mails to cases and calls.
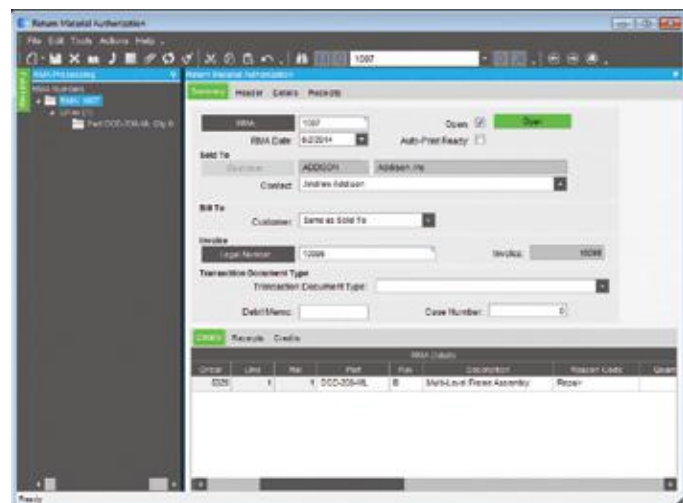
Social Service

Epicor Social Enterprise brings together contributions from across the organization and the value chain. This information can be collected in a single location with or without the user needing to interact with the ERP. Recommendation or endorsement of content supports the creation of knowledge bases and reusable content that can be referenced easily using powerful search capabilities.

Issue resolution or Frequently Asked Questions (FAQs) can be linked to a specific service job, or asset or serial number for the life of the object.

Returned Material Authorization

Enhanced return processing offers enterprise-wide tracking of pending returns and disposition of these parts by unique RMA number. Enter information about returns, and transfer that information to the different groups that may need to take action (e.g., inspection, billing and order processing). Armed with full notes capabilities and document management functionality, tracking the steps of a returned part for requirements certifications is inherent in the system.

Initiate and track RMAs for customer returns and track reasons for rejected items.

Unique RMA Number

Automatically generate a unique RMA number that can be submitted to the customer for tracking parts as they are received.

Non-Nettable Bins

Use non-nettable bins to keep parts undergoing inspection or review out of current on-hand quantities.

RMA Disposition

Track and cost the disposal of returned products in RMA disposition.

Credit Request

Automatically generate a credit request based on disposition of a returned product.

Returning Serialized Parts

Track returned serialized parts from the moment they come into the plant through quality disposition.

Notes

Use detailed notes capabilities for closely tracking activity using date and user ID stamping.

Reason Codes

Assign user-defined RMA reason codes for return analysis.

Cost Of Returns

Manage cost of returned products by linking to the original order shipped and accessing the cost of the shipment.

Quality Assurance

Epicor Service Management works alongside Epicor Quality Assurance to provide visibility within the quality assurance inspection queue, send product to the material review board (MRB), and link to corrective actions.

Maintenance Management

An effective enterprise maintenance management solution for monitoring and managing the deployment, performance, and maintenance of company assets may be the single most important tool for preventing operational surprises. Epicor Maintenance Management enables manufacturers, distributors, and services organizations to save time and money by optimizing maintenance resources, improving equipment up-time and maintenance staff productivity.

Maintenance Management provides companies with a comprehensive toolset for production and facilities equipment maintenance that is critical for running their business. It has been 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.

Service Management

Facilities and production equipment can be scheduled for maintenance based on a pre-defined service interval, based on 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. Once a preventative or regular maintenance work order is established, the maintenance planner can schedule equipment down time, and trades resources and materials as needed. When maintenance has been performed on equipment, the tradesperson workers can record their hours spent, any materials used, and clo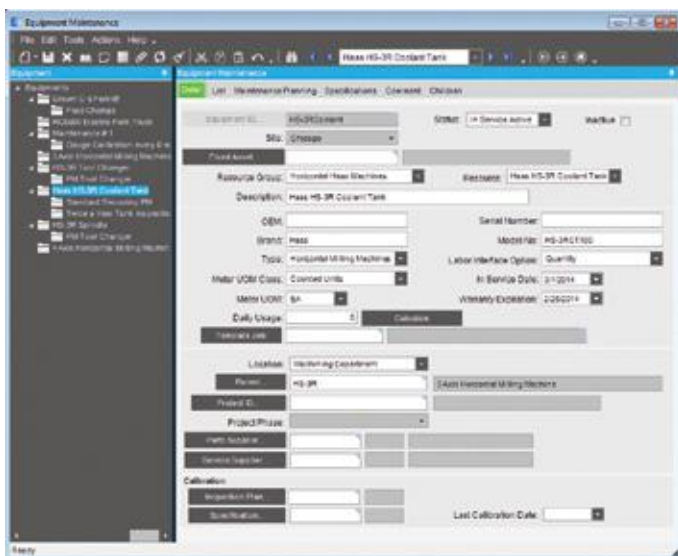sing remarks as to the extent of the repair or service. The Maintenance Management module maintains all equipment, material, and work histories as a result.

Equipment Maintenance
Closely track each piece of equipment for maintenance purposes with appropriate serial number, in service date, equipment location, warranty expiration date, and preventative maintenance plans. Use Equipment Maintenance to define equipment records for use within the Maintenance Management module. You can establish records for each tool or piece of capital equipment you maintain and which you track for maintenance purposes.

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

Parent Child Equipment
Manage complex equipment more closely by breaking the equipment down to the component level for targeted preventative maintenance and better maintenance history analysis.

Maintenance Work Orders
Create maintenance work orders automatically from templates for routine maintenance (e.g., oil changes, filter replacements, belt changes), eliminating manual input.

Maintenance Request Management
For unscheduled maintenance, a request system is available for anyone to request maintenance on equipment.

Maintenance Request Queue
Requested maintenance is monitored in a maintenance queue where it can be accepted and assigned to a maintenance tradesperson, deferred for further planning or rejected with reason.

Preventative Maintenance
Setup complete preventative maintenance work plans then. Automatically create maintenance work orders when preventative maintenance is due. Base maintenance plans on time-based or meter frequencies.

Scheduled Maintenance
Include scheduled maintenance events, such as resource requirements, in the production schedule for better capacity planning.

Special Tools Tracking
Closely manage specialized tools, including scheduling of required tools for a specific maintenance event, to help ensure the tool is available to perform the required maintenance.

Issue and Resolution Tracking
Standardized issue and resolutions codes assure analytics of maintenance events. Understand and make decisions more proactively regarding taking equipment "out of service" or providing employee training in standard care.

Warranty Tracking
Track the warranty information on all of your equipment, tools and vehicles. Know when your assets are still covered under warranty, length of term, and more.

Equipment Maintenance Tracker
Review online equipment for maintenance, including status and historical meter readings.

Work Order Request Tracker
Review request status online.

Maintenance Work Order Tracker
Online view of maintenance work orders including work order status and details, tradespersonman notes, cost details, and completion details.

Gage Calibration Plans
In conjunction with Enhanced Quality Assurance, calibration test plans can be tied to equipment and executed to track results of tests.

Repair Histories
Produce complete repair histories for each repair for equipment, including parts and labor cost.

Reporting
Standardized reports such as the Maintenance Work Order Request Report, Maintenance Work Order Report, and Equipment List help maintenance trades and management men organize and communicate maintenance events and review histories.

Product Data Management

Epicor Product Data Management (PDM) serves as a central knowledge repository for process and product history. PDM promotes integration and data exchange among all enterprise users who interact with products—including project managers, engineers, salespeople, buyers, and quality assurance representatives.

Epicor offers a solution that helps manage the powerful information traditionally contained in engineering documents, plant floor routings, change orders, sales orders, and quality documentation within a single solution that is easily shared across the enterprise.

Promoting collaboration throughout the value chain, Epicor PDM solution helps to provide a complete end-to-end solution to manage all aspects of a product's lifecycle, enabling enterprises to control the enormous amount of electronic documents they produce.

Bill of Materials (BOM)

Epicor supports traditional BOM management with single-level part formats that recognize the materials and components required to build end parts. In addition, Epicor introduces multilevel BOM management that incorporates not only single-level components and material requirements, but also internal and external routing steps for complete end assembly visibility, planning, scheduling, and costing. Epicor introduces visual engineering technology with indented tree structures and drag-and-drop BOM management.

Use the Engineering Workbench to build a visual view of a new bill of materials, accessing similar structures and revision levels.

Methods of Manufacturing
Manage product BOM and routings in one central location. Part specific methods of manufacturing are controlled through engineering and offer drill-down functionality to lower level subcomponents along with material and routing components required for each.

Drag-and-Drop Interface
Use a simple tree interface to easily drag-and-drop components, operations, or direct materials from another BOM, quote, or previously run job.

Visual BOM Display
Easily see the structure of a product, including multilevel components and subcomponents.

Same-as-Except
Manage BOMs easily with "get detail" functionality that enables the user to pull an existing method of manufacturing for a product and make modifications for future runs or similar products.

Alternate BOM
Use alternate BOMs to predefine multiple BOM structures for the same part with perhaps material or component substitutions. In a multi plant environment, BOMs at the plant level facilitate choices of where to build the part using plant appropriate methods. Optionally have several BOMs within a plant for the planner to choose the most cost-effective build.

Expansive Part Number
Use up to 50 characters in part length for a part number. System settings optionally designate maximum length of the part ID used.

Reference Designators on BOMs
Reference designators provide the ability to store multiple reference designators on BOMs. Also offers explosion reports by component and by reference designator from quotes, jobs, and the engineering workbench.

Document Linking
Link product specific documentation (e.g., electronic drawing and machine instructions) for easy access and document control using document management.

Costs Stored
Besides material costs, additional costs for manufactured parts (e.g., labor, burden and subcontracting) are stored and monitored within the BOM structure.

Cost Replace
The cost replace function rolls up costs from the BOM and updates the finished goods inventory file.

Requirements Reporting
A summarized material option, in addition to the standard indented BOM requirement report, is available to provide total requirements for each material.

Critical Path View
Easily view the critical path for the product.

Phantom Structures
Stock assemblies in inventory or maintain phantom assembly structures, giving you the flexibility to process complex jobs without having to first establish a complete BOM.

Routings

Detailed routings facilitate planning, scheduling, and costing of products more efficiently. Everything needed to produce a product is managed in one central location.

Managing changes to routings is simplified. Changes are automatically communicated to the plant floor execution system and operators have online visibility of the latest routing production notes as well as standards and resource requirements.

Methods of Manufacturing
Manage product BOM and routings in one central location. The part-specific method of manufacturing is controlled through engineering and offers drill-down functionality to lower level subcomponents along with material and routing components required for each.
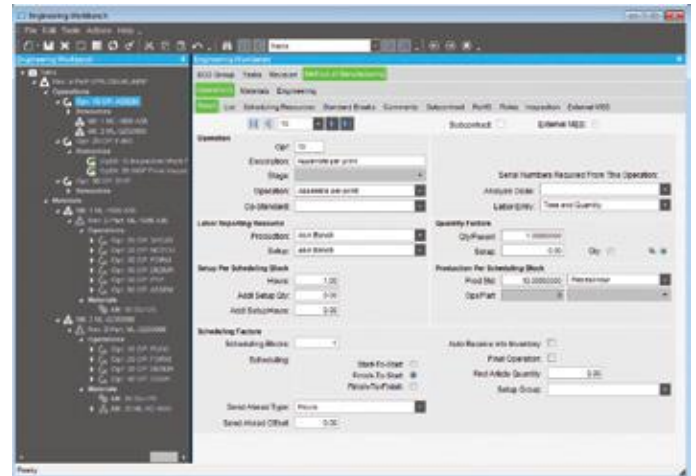
Build a visual view of a routing for a new part using the integration to other engineering information and the drag-and-drop interface

Easy to Use Interface
Easily understand, navigate and revise even the most complex, multilevel routing in the tree structure of the engineering workbench. Free up engineers to focus on constructing the most cost-effective build. Quickly build new routings and easily modify existing routings using the Epicor drag-and-drop engineering tools.

Expedite Engineering
Streamline engineering by modifying existing methods for same-as-except quotations and production runs. Enable engineers to begin with an existing method of manufacture from the methods master, a quote or job, then modify it for the project at hand with the Epicor "get details" functionality.

Alternate Routings
Define and maintain multiple routings or material substitutions under a single part number. In a multi plant environment, alternate routings at the plant level facilitate choosing where to build the part using plant appropriate methods.

Flexible Production Standards
Manage and measure jobs using traditional time-based production standards including:

▶ Pieces per hour ▶ Hours per piece

▶ Pieces per minute ▶ Minutes per piece

▶ Operations per hour ▶ Fixed hours

▶ Operations per minute

Dimensional Planning
Plan by volume and quantity using dimensional planning that is not time constrained.

Daily Capacity
Add flexibility to your planning with daily production rates that are quantity-based rather than time-based.

Product Data Management

Resource Planning
Allow the system to automatically pick or schedule the resource to be used or call out the specific resource at the time of planning. Routings can indicate general resource groups needed.

Plan as Assembly
Use Plan as Assembly to plan lower component manufacturing parts without the need to include them in the full assembly structure. This feature enables complex planning for Multilevel complex parts with components that are typically stocked.

Capability Planning
With APS you can specify a capability of a resource and allow the scheduling engine to determine the specific resource based on availability of the capability or skill level.

Default Operation Standards
Enter new routings quickly and easily using default operations and operation standards for resources.

Decimal Precision
Built to manage the needs of precision manufacturers, the production standard field has 10 characters behind the decimal point.

Production and Setup Cost
Perform cost analysis of production separately from setup. This enables tight cost control of these key functions.

Fixed and Variable Burden
Assign resource-specific or variable burden based on the optimization of the schedule and available resources.

Subcontracting Services
Include outside services in routing steps for accurate planning of costs and lead-time. Communicate with purchasing, shipping and receiving, as well as production management for full visibility of subcontracting operations.

Online Routings
Communicate the latest routing changes to the shop floor efficiently with the electronic work queue.

Document Management
Epicor drag-and-drop attachments support the ability to manage and view attachments against any record or application process. With respect to BOMs, additional functionality exists to allow attachments linked to end Products and components to automatically flow to production planning and eventually the production floor, ensuring strong control of product and process documentation at each product revision and production run. Attachments at the record level would typically provide information, drawings, documentation, or context specific to that record. All attachments can be secured using standard role-based security.

Microsoft SharePoint® Repository
Document management and attachments capability also offers the use of a Microsoft SharePoint document repository. This provides document versioning, check-out and check-in support, and facilitates integration to other document management systems.

Engineering Change and Revision Control

Achieve control and consistency in your engineering change and revision process. Engineering Change and Revision Control is designed to enable engineering change management, multiple revision control of products, engineering workflow management, and offers detailed cost analysis of products during the engineering process.

Engineering Workbench
Give engineers an area to manage all engineering tasks related to the modification, review and approval of assemblies, including: full revision updating and control, check-out procedures, security, engineering change orders, BOM maintenance, what-if BOM maintenance, what-if cost rollups, adding parts, placing parts on hold, and product routing maintenance. The engineering workbench also enables engineers to drill into all related information (e.g., jobs, inventories, sales orders, and quotes).

Engineering Approval
Enforce the approval of a method before it can be pulled into a job or quote.

Multiple Revision Capabilities
Store and manage every revision of a product individually along with effectivity dates, historical change, and audit logs.

Revision Effectivity
Manage revision by effectivity date.

Powerful Search
Look for previously used parts by creating a quick wild card search of all parts in the system.

Revision Control
Employ complete revision tracking of fields that you specify, including an audit trail of date, user ID, and description of the change.

Revision Compare
Dynamically and visually compare product methods for product plans that change before the product is complete. Easily compare methods of manufacturing for any part to a quote or job for the part and visually see the changes highlighted in color.

Product Data Management

Engineering Workflow
Automatically assign and route the work needed to process changes as well as the process for engineering new products. Tasks are tightly embedded into the system ensuring that transactions can only be updated if the task is at the right status.
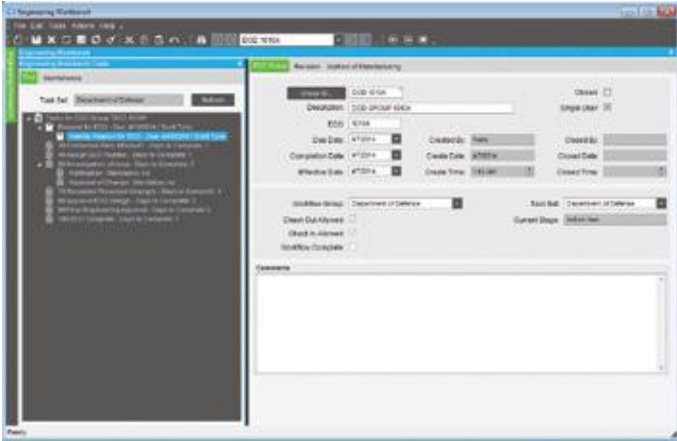
Closely manage the engineering approval process with defined workflow.

Where-Used
By displaying every product or assembly in which a specified component is used, you are able to identify those parts that would be affected by a design change or material substitution being considered.

Mass Replace/Delete
Efficiently update all BOM structures when engineering changes occur.

Express Check-Out
Use express check-out, designed for quick-change environments, for quick check-in and check-out of parts.

CADLink for Epicor
CADLink for Epicor increases the speed of engineering data flowing from the engineer's desktop to the rest of the business, in particular procurement and manufacturing. The solution is designed to streamline the entire product development process. With CADLink for Epicor, engineers push forward BOM revisions to Epicor ERP with a click of a button without leaving their familiar CAD environment. CADLink for Epicor eliminates all the burdens of disparate systems, allowing engineers to focus more on what they do best; engineering.

Driving ERP synchronization, CADLink for Epicor enables engineers to search capabilities of their Epicor ERP system for existing part numbers using either part number or description. Users can also search for part parameters such as class code, product group, and UOM directly from within the CADLink interface. CADLink for Epicor displays BOM data discrepancies between CAD models and ERP data and offers online changes.

When revisions are complete, CADLink saves item revisions bi-directly to and from the CAD system and Epicor ERP. CADLink for Epicor is available with major CAD systems. ECN Manager is available for integrated change processing.

CADLink is also capable of handling purchased parts. It allows you to add purchased part numbers and other data directly from within the CAD environment. You can add, view, and edit non-CAD modeled parts, such as paints, consumables or packaging, to the ERP BOM for inventory or costing purposes. This gives engineers an ability to review the complete BOM and not just the components modeled in the CAD.

Product Lifecycle Management

Epicor Product Lifecycle Management (PLM) serves as a central knowledge repository for process and product history, and promotes integration and data exchange among all enterprise users who interact with a product. Epicor PLM manages all documentation associated with a product throughout its entire product lifecycle, and includes full integration with more than 12 computer aided design (CAD) systems as well as various electronic design automation (EDA) systems. Epicor PLM is particularly useful for companies that:

▶ Design what they manufacture

▶ Want standardized methodologies around work flow

▶ Use CAD or EDA systems

▶ Use drawings to produce a quote or an order

Epicor PLM provides an electronic vault where documents can be securely stored and where access and versioning can be tightly controlled. The type of sophisticated document management that PLM offers is critical for those organizations that need excellent audit tracking and control of all documents across the enterprise. PLM also provides advanced document search and retrieval functionality. Increase your productivity by more efficiently managing the product life cycle—from design to end-of-life.

Electronic Vault
Epicor PLM contains a secure vault, a product knowledge repository that holds documents in a password protected electronic data vault accessible only via the PLM system.

Document Security
Provide a tight level of security. Control who can view or access documents. Protect your specifications, CAD models, drawings, e-mail messages and NC programs from loss or unwarranted access.

Check-In/Check-Out
Prevent users from altering documents that are currently checked out by other users.

Product Data Management

Engineering Change Order (ECO) Processes

As many 3D models as desired and any number of derived technical drawings of one or more CAD systems can be assigned to each part. Epicor PLM supports the entire product change order management. All changes to CAD models or drawings are documented in a change history. History entries include date, change reason, and user. Additionally, processes defined using Epicor PLM Workflow assures change order control, from the beginning of the modification to the final release. All part master data, characteristics, and the change history journal are transferred and documented in the title block of the respective drawings. Upon further modifications this data is updated automatically. Additionally, the bill of material can be inserted into the drawing.

Search Capabilities

Search and retrieve by multilevel classification, key fields, or graphically navigate through a document hierarchy.

Document Viewing

Preview drawings or documents, enabling your engineers to quickly view a large drawing without downloading it to their CAD system.

Document Relationship

Maintain relationships of documents to parts, projects, customers, and more. View the relationships between parts and documents (as well as document contents) via a structured tree view, so engineers can quickly see the impact and use of all documents.

Export or Import Documents: Documents can be retrieved from Epicor PLM's protected electronic vault for external processing. At any time later, they can be checked in again. While checked out, drawings are labeled as 'locked,' avoiding any modification conflicts.

Document Linking: Link product specific documentation, for example, electronic drawings and machine instructions for easy access and document control using document management.

Workflow Management: Epicor PLM provides configuration functions that describe the rules for workflow state transitions.

Change Log

Use document change logs for access to historical details of changes.
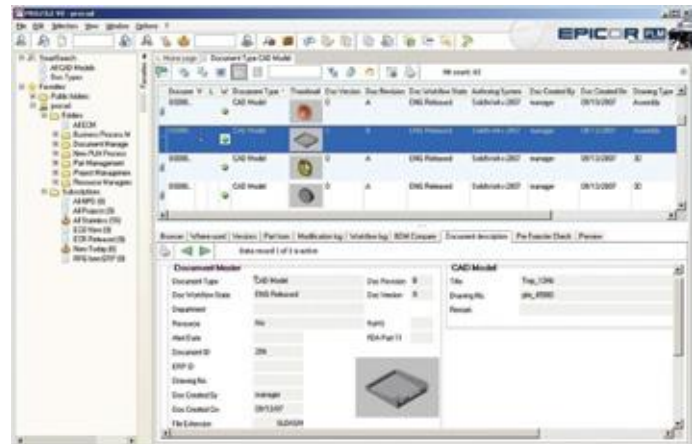
Create a view of the product integrated with engineering to manage the product from design through production.

CAD Integration

Integrate your PLM processes into each CAD program's native menu system. Your product data, versions, revisions and BOMs are directly transferred into the drawing title block, which is automatically updated whenever a modification occurs.

Sub-Document Management

Control and dynamically build documents or drawings that are comprised of multiple components (e.g., pictures, text, or other documents separately). This uniquely enables Epicor PLM to manage multilevel complex assembly documents in a single step.

Project-Oriented Functions

Collaboration in global work groups and project teams is a common and proven method of how work gets done. Epicor PLM fully supports team collaboration. Access to product data and documents can be made available on a project-by-project basis. Employees can be assigned different roles within one or more projects, defining access rights at the project level.

BOM Push from CAD

Push BOM data directly from within the CAD application to Epicor PDM.

Updating Title Blocks

Automatically transfer changes to part master information onto the title block of any associated drawings.

Revision Management

Manage version and revision of CAD documents.

Automatic Generation of BOM

Automatically generate the BOM for a part from CAD files, including "where-used" information.

Drawing Copies
Generate drawing copies in a neutral data format (e.g., HPGL and TIFF).

CAD Systems Supported
Integration is available with a variety of CAD systems including AutoCAD®, Catia® V5, Inventor, ME10, MicroStation®, Pro/ENGINEER®, Solid Edge®, SolidWorks®, and Unigraphics® are available in the mechanical CAD world. Many electrical CAD integrations are available as well.

E-mail Integration
Epicor PLM supports Microsoft Outlook and IBM® Lotus Notes® e-mail packages, allowing you to store e-mail messages and file attachments in the secure vault and manage the distribution and access to those messages and files. This is critically important for managing customer relationships and adhering to legal and regulatory mandates.

Microsoft Office Integration
Epicor PLM records documents at their place of origin and works fully integrated in Microsoft Word, Excel and other Office applications. Text documents or spreadsheets that have been drafted using these applications are directly stored in the database.

Product Costing

As a manufacturer or distributor, you consistently monitor product cost and analyze profitability as a way to pass on cost savings to customers while staying competitive. Epicor offers the flexibility and accuracy needed to analyze product cost on a customer-by-customer, part-by-part, and job-by-job basis.

Elements of Product Cost
Maintain elements of product cost in separate buckets, including material, labor, burden, subcontracting, and material burden cost. Costing methods include:

- Average
- Last
- Standard
- Lot
- First In First Out
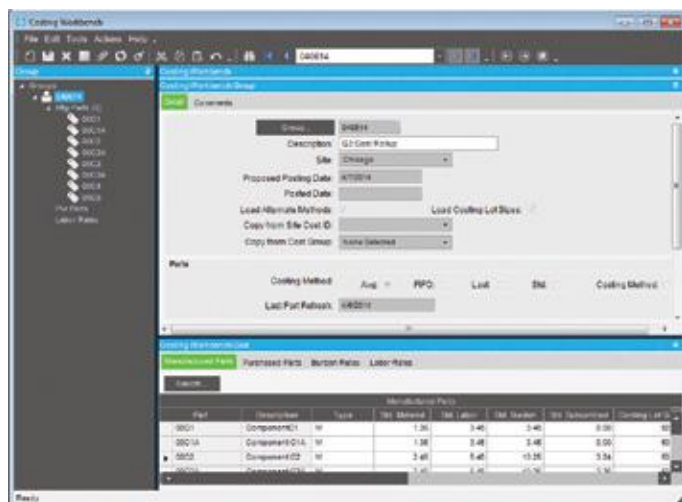
Maintain and view costing by part type and cost type, and access this information throughout the system.

Costing Workbench
Manage part costs in a single location. Specialized tools pull in the most recent costs and automatically perform cost rollups. Designed with full audit capabilities, the workbench offers variance analysis prior to posting new cost tables along with the effective dates of the costing changes. The costing workbench offers easy manipulation of resource, resource group, and operation cost.

Cost Set Grouping
Group multiple parts together for fast and easy periodic cost updates.

Multiple and What-If Cost Sets
Manage multiple cost entries per part with effectivity date per cost set. Optionally generate what-if cost scenarios and review change analysis prior to posting.

Part Cost Per Plant
Set up a unique cost set for each plant allowing part cost per plant to be closely defined.

Cost Load
Pull in initial cost from previous cost sets and make changes for easier cost adjustments. Cost sets can be generated from alternate BOMs or routings for what-if scenarios.

Cost Rollup
Generate a new cost for a product with an automated cost rollup based on the existing routing for the product and current cost values for material, labor, burden, subcontracting, and material burden. For complex parts with many assemblies, you can specify whether to roll up subcomponents.

> **Costs Stored**: Besides material costs, additional costs for manufactured parts (for example, labor, burden, and subcontracting) are stored and monitored within the BOM structure.

Use Alternate Methods
Optionally use alternate routing in performing cost rollup. This is especially useful when generating what-if cost analysis.

Cost Rollup Group Report
Print what-if changes prior to posting. Review proposed change detail including variance percentage.

Product Configuration

Product Configuration enables on-the-fly configuration of highly customizable and dimensional products via a straightforward question and answer evaluation. Product Configuration can be accessed from quote entry, order entry, and job entry. It is Web-enabled, and is available to users employing Commerce Connect.

Product Data Management

Approval
Formally approve all configurations before they can be put into circulation. When a configuration revision has been formally approved, it can be pulled into a quote, order, or job. An audit trail logs user ID and approval date.

Bill of Materials
Tie a configuration to a BOM structure containing multiple options. Each option can also have rules attached. Rules are executed during entry of a configuration to correctly configure the BOM and routing.

Revisions
Optionally create unique configurations and rules for each revision of a BOM. Configuration responses are stored with other product information for historical auditing and accuracy.

Component Price Lists
Allows you to use the component level price lists as the product is configured.

Copy/Paste
Allows users to copy configurator rules from one module to other (copy/paste).

Screen Input Builder
Build custom screens in which product features and other inputs can be entered during quote and order entry. Form controls (e.g., fill-ins, combo boxes, and toggle boxes) are used to prompt users for data.

Dynamic Lists
Building conditional options is easy with dynamic lists.

Generic Part/Multiple Rules
Allow use of the same generic part with multiple rules on multiple assemblies.
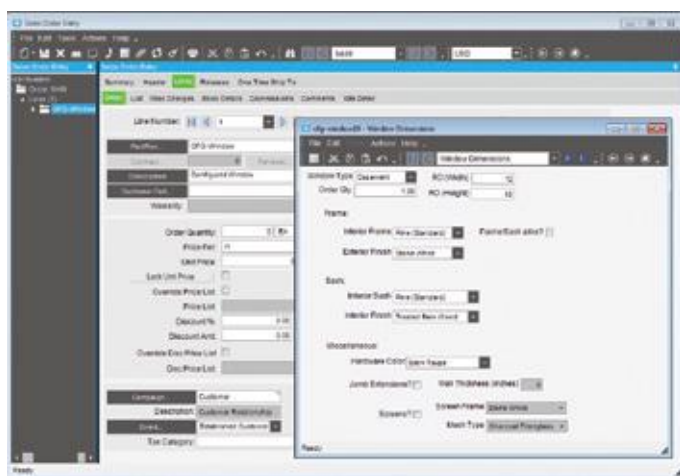
Build complex and flexible configuration models with attractive interfaces to customers.

Global Variables
Provides the ability to hold and use global configurator variables.

Import/Export Configurations
Provides the capability to import/export configurations.

Pricing
Calculate pricing as a product is configured. Either features/options or rules-based pricing can be applied.

Options
Define the features and options of a product at design time, then customize during quote and order entry.

Rules
Build your own unique rules with an easy-to-use expression builder. Process rules during quote and order entry to create an accurate BOM from the features and options selected.

Add Comments to Rules
Capability to add comments to document formulas used when creating the rules.

Keep When Rules
Allows for a configuration at all levels of a part, but only for the subassemblies that are stored. Subassemblies have 'keep when' rules.

MRP Inclusion
Configured parts can optionally be included within MRP to help manage mass produced custom product lines.

Help to Ensure Rule Accuracy
Test rules and inputs during design mode to eliminate surprises during processing. Full reporting is available as an audit trail.

Smart Part Number
Build a smart part string during entry of a configuration to allow easy identification of the options selected.

Create Part Numbers
Optionally create actual part numbers in the inventory master file using the configured smart part number. Creating the part automatically eliminates manual entry when a new part is configured and ordered.

Capable to Promise
Configurations are easily confirmed with embedded available to promise and capable to promise capabilities that consider current capacity, MRP and APS.

Web-enabled Configurations
Easily execute configurations over the Web. Configurations can be embedded right in your Web site or in a Commerce Connect Web store, extending capabilities to configure to customers and distributors more easily.

Configured Parts within Configured Parts

Deploying rules based configurations with configured components can be tricky. Epicor offers a solution for managing the complexities of these configurations with real business benefit.

Multilevel Configured Parts

Manages multilevel configured parts, with the ability to configure and sell an assembly in one company, and produce it in another.

Parametric Configuration

ConfiguratorLink for Epicor is a powerful tool that extends the native functions of the Epicor Configurator to allow it to become a Parametric Configurator.

ConfiguratorLink automatically rebuilds 3D models according to Epicor Configurator parameters defined and mapped to CAD models, allowing users to produce 3D models and drawings quickly in sales and production processes. No mundane CAD work for your engineering staff. Helping employees and customers visualize the configured product is a few clicks away.

ConfiguratorLink also has the ability to search and pull configuration parameters and automatically create CAD files for production processes such as burn table or CNC lathe. Quote integration produces 3D CAD files that are ideal for customer approval and signoff.

Finally, ConfiguratorLink can push parameter data back to Epicor. Any parameter changes made in CAD will be saved back to the configuration parameters in Epicor. No need to jump back and forth between CAD and ERP.

► Forecasting and Master
  Production Scheduling
► Forecast Pro for Epicor
► Material Requirements Planning
► Scheduling and Resource Management
► Advanced Planning and Scheduling
► Multisite Management

Planning and Scheduling

Performance-driven companies have mastered the art of predicting and responding quickly to changes in customer demand with minimal business interruption. Whether you are a global, multisite enterprise or a single site manufacturer or distributor, precise and flexible planning and scheduling is imperative to efficient and profitable operation. Epicor offers a comprehensive solution for forecasting, material requirements planning (MRP), scheduling, and advanced planning and scheduling to meet the needs of today's agile businesses. For companies with complex processes that require project management and resource management capabilities, Epicor Planning and Scheduling offers a comprehensive solution that is baked into the fiber of the product for unparalleled operational visibility.

Forecasting and Master Production Scheduling

Forecasting and Master Production Scheduling (MPS) in Epicor are designed to assist manufacturers and distributors with both day-to-day control and long-range planning and decision making. Forecasting and MPS support your business strategies, as well as those businesses that operate multiple, mixed-mode strategies simultaneously. Forecasts can be generated from multiple historical sources (e.g., sales, invoice, and inventory usage history).
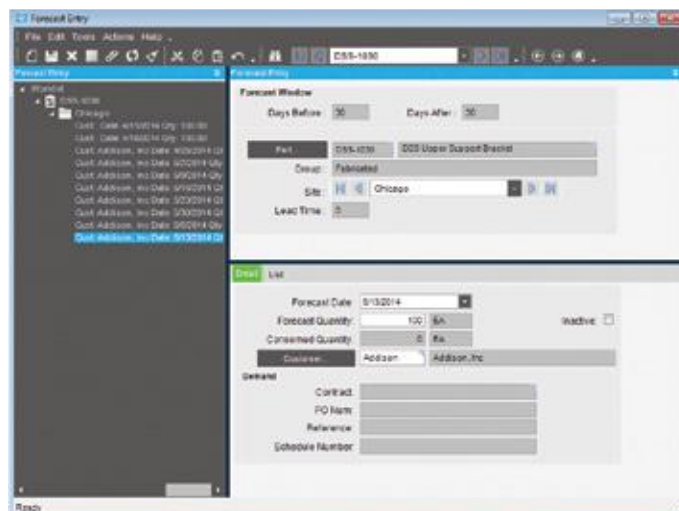
Display a forecast by customer and part number with information imported from a variety of sources.

Manual Forecast Entry
Manually enter forecasts for companies, plants, customers, dates, and parts. Users can cut-and-paste from other applications into the forecast system.

Forecast Export
Export historical information to third-party applications for the calculation of forecasts.

Forecast Import
Import forecasts from other applications or customers. Import options allow forecasts to be broken down by part, customer, plant, date, and company. This import can be additive, update the existing forecast, or a complete clear and re-load.

Forecast Methods
Epicor Enterprise Performance Management (EPM) offers a number of forecasting methods:

Focus: A simulation technique where forecasts from the past are simulated, using several simple or statistical algorithms, and then compared to what really happened in the past. Six different strategies are available:

► Past periods this year	► Straight line
► Moving averages	► Growth over last year
► Past periods last year	► Exponential smoothing

Statistical: A method which uses mathematical algorithms to fit curves to the historical time series. Three different strategies are available in the strategies dialog box when you choose statistical:

► Moving averages	► Straight line
► Exponential	

Forecast Buckets
Bucket forecasts in any way: daily, weekly, monthly, yearly, etc.

Forecast Analysis
Forecast any number of variables (e.g., revenue) rather than just forecasting product units. Forecasting allows any number of tiers to be forecast and analyzed (e.g., forecasting product units by company, state, city, and customer).

Inter-Company Trading
Dynamically accept forecasts from other companies within the enterprise. This allows companies to give visibility to the supply company of future demand without needing to raise a firm inter-company order.

MPS Entry
Manually enter or cut-and-paste MPS from other applications.

Forecast to MPS
Automatically generate the MPS for forecasting.

Driving Capacity and Raw Material Procurement
Make and alter MPS decisions based on constraints. Both forecasting and MPS can independently drive future demand.

Forecast Pro for Epicor

Forecast Pro® for Epicor is a comprehensive forecasting solution designed for accurate automated forecasting, collaborative forecasting, working with complex hierarchies, maintaining multiple forecast overrides, documenting your forecasting sessions, and integrating with other systems. With Forecast Pro for Epicor you can create accurate forecasts quickly and easily using proven statistical forecasting methods such as Exponential Smoothing, Box-Jenkins, Event Models, Multiple-level Models, Seasonal Simplification, Low Volume Models, Intermittent Demand Models, Moving Averages, Curve Fitting, and Simple Methods.

Use Forecast Pro for Epicor Expert Selection capabilities to simplify the forecast process by creating accurate forecasts automatically.

Expert Selection
Forecast Pro for Epicor Expert Selection mode analyzes each item and selects the appropriate forecasting method automatically. If you prefer to specify the forecasting approach, Forecast Pro for Epicor provides a complete range of forecasting methods and all the diagnostic tools you need.

Proven Statistical Forecasting Methods
Forecast Pro for Epicor supports Exponential Smoothing, Box-Jenkins, Event Models, Multiple-level Models, Seasonal Simplification, Low Volume Models, Intermittent Demand Models, Moving Averages, Curve Fitting, and Simple Methods such as same-as-last-year and same-as-last-year plus growth.

Adjust the Forecast with Business Expertise
Forecast Pro for Epicor lets you adjust your forecasts on a graph or in a spreadsheet-like display—in either view, you see both the historical data and forecasted values, allowing you to easily compare patterns within the data. Adjustments can be made at any level in your hierarchy and automatically reconciled. A handy commenting facility allows you to document any adjustments.

Make Convincing Presentations
With Forecast Pro for Epicor, you can create dazzling, presentation-quality reports in seconds. Four professionally designed standardized report formats are included as well as a custom reporting option for maximum flexibility. Forecast Pro for Epicor writes directly to Excel (.xls and .xslx), making it easy to share your work.

Collaborate with Others
Working with colleagues can also improve the forecasting process. Using up to ten customizable override rows and handy comment fields, you can easily collaborate with your colleagues and document your changes to foster a truly collaborative forecasting process.

Save and Restore Forecasts
Forecast Pro for Epicor allows you to save and restore your forecasting sessions including the forecasting models used, the forecast overrides and their associated comments, and all of your reporting options.

Manage Hierarchies
With the Forecast Pro for Epicor powerful "shuffling" capability, you can rearrange your hierarchy on-the-fly. Need to generate a report showing product level forecasts broken out by customer and then create another report showing customer-level forecasts broken out by product? No problem!

Exception Reporting
Focus on the items that need attention with Forecast Pro for Epicor comprehensive exception reporting, you can automatically flag exceptions, saving you from manually reviewing every forecast. Exception reports allow you to analyze the forecasts you are currently working on as well as previously completed and archived forecasts.

Monitor Forecasting Performance.
Forecast Pro for Epicor maintains an archive of your previous forecasts (including the statistical forecast as well as the adjusted forecast) so you can compare forecasts vs. actuals. With just a quick glance at Forecast Pro for Epicor waterfall reports you can zero in on what's working and what isn't.

Consolidate Team Forecasts

Forecast Pro for Epicor allows you to break large forecasting projects into smaller pieces that can be worked on separately and then reassembled into consolidated forecasts. For example, if three demand planners are responsible for three different geographical areas they can work independently and once they've completed their work, the forecast can be consolidated for further review and manipulation.

Forecast Pro for Epicor Collaborator

Forecast Pro for Epicor Collaborator is a fully integrated companion product to Forecast Pro for Epicor which provides an easy and affordable way to collaborate with colleagues. Forecast Pro for Epicor Collaborator allows others to view your forecasts—including graphs and reports—add overrides and comments, and save the results.

Work With Your Existing Epicor Data

Forecast Pro for Epicor imports data in a variety of flexible, easy-to-create formats including Excel, text files, and ODBC. These flexible formats allow you to easily import and export data from your Epicor system or other external systems.

Material Requirements Planning

Built for the needs of the single site as well as extended enterprise, MRP offers cross plant and cross company planning. Enhanced to offer plant source as well as product group sourcing of materials and assemblies, MRP automatically and visually extends the enterprise to efficiently manage supply and demand.

Forecast

Enter general part forecasts or specific customer/part forecasts. MRP consumes the forecast with actual orders as they are received. View lower-level component requirements with long lead-times before the end part is released.

Manual Forecast

Manually enter forecasts for companies, plants, customers, dates, and parts as well as cut-and-paste from other applications into the forecast system.

Forecast Export

Historical information can be exported out to third-party applications for the calculation of forecast.

Forecast Import

Import forecasts from other applications or customers. Import options allow forecasts to be broken down by part, customer, plant, date, and company. This import can be additive, update the existing forecast, or a complete clear and re-load.

Master Production Schedule

Enter production forecasts for specific end parts using the MPS function. Perform an iterative process of entering a planned schedule, viewing the effect on your resources, then modifying the plan until you have achieved an optimal schedule.

MRP Generation

Run MRP with either net change or full MRP regeneration options. The MRP generation process balances the demand of customer orders and forecasts with the supply of jobs. As orders and forecasts change, MRP automatically adjusts corresponding jobs so you are in balance. MRP even reschedules your plant for you.

Log File

See what changes were made by MRP in the log file.

Material Planning

Create purchase order suggestions for inventory and purchased parts that are needed to complete production. Use lead times and vendor price breaks to determine when the part should be ordered and at what price.

Dynamic Lead-Times

Take into consideration variables such as the batch size, production calendar for a resource, the run rate of the resource utilized and the availability of material flagged as constrained in production schedules.

Check supply and demand of a part with Available-to-Promise functionality.

Part Planning Tools

Account for production prep, kit, and receipt time. Use this to derive appropriate lead-time for producing the product in addition to cycle-times required to produce the product.

Plan as Assembly

Use Plan as Assembly to plan lower component manufacturing parts without the need to include them in the full assembly structure. This feature enables complex planning for Multilevel complex parts with components that are typically stocked.

Planning Horizon

Review the planning horizon of a part or resource, then plan to, but not beyond the horizon, preventing premature planning.

Auto Job Firm Process

Use predefined rules to firm and move MRP production requirements to production planning automatically, for rapid response to current demand.

Multisite

Run MRP for all plants or for individual plants within a company. Changed schedule dates roll down to all subcomponents—even those being manufactured in another plant.

Multilevel Pegging

Analyze all the supply and demand in your system, then peg each supply against demand, prioritized by due date. Because supply is calculated for every inventory item from all possible sources—regardless of whether demand exists—you are alerted to items that may be overstocked or obsolete.

Sourcing By Plant

Define a unique source per part or plant—whether its default sourcing is purchased, produced, or transferred. What is produced in one location may be purchased—or transferred in—from another.

Available-to-Promise

View running balances with the available-to-promise function. Enter a quantity, and the system will find the earliest date that quantity will be available. Enter a date, and see how many parts are available on that day. MPS, forecast, order, and planned receipt quantities are visible to help you in your production planning tasks.

Planning Types

Maximize your planning accuracy with multiple types of inventory planning, including minimum/maximum/multiple, days of supply and run out.

Rough Cut Horizon

Enable MRP to process more efficiently by removing the time spent scheduling beyond a specified threshold or rough cut horizon.

Recycle Jobs

MRP reuses un-firm jobs for optimum MRP performance.

Short Horizon Days of Supply

To optimize MRP performance, a Short Horizon Days of Supply field is included within the Part Maintenance program on the Plant Detail sheet. This field defines a material value that will be used when MRP determines that the needed materials falls within the Short Horizon. Here's how this is calculated:

▶ If that day is <= Schedule Start Date + Short Horizon Days, then the Short Horizon Days of Supply value will be used for the materials.

▶ If the date is > Schedule Start Date + Short Horizon Days then the Standard Days of Supply value will be used.

Short Horizon Planning

The Part Maintenance program includes the Short Horizon Planning functionality. The Part-Plant sheet contains the following fields: Horizon Days, Min Lot Size, and Max Lot Size.

Calculate Manufacturing Lead Time

Plan for part components lower down in the assembly structure for accurate MRP scheduling.

Start Minimum Quantity

Account for partial material availability in MRP calculations to get started earlier with available material and improve delivery performance.

Bill of Materials

MRP checks the revision level and verifies approvals before pulling in a standard BOM and routing. For parts that do not have a current approved revision, a job suggestion is created in the new/change order queue to help ensure requirements are not lost.

Scheduling and Resource Management

Multiple resource views and online scheduling tools such as the change impact informer offer the master scheduler and manager the ability to visually locate overload problems and slack conditions, then perform cost and throughput analysis on schedule changes before they are firmly committed.

The scheduling engine uses several factors that affect production quantity, setup time, production time, capacity, priority, and so on to calculate how long it will take each job to complete. It then displays the schedule through the Job Scheduling Board, the Resource Scheduling Board, and the Multi-Resource Scheduling Board.
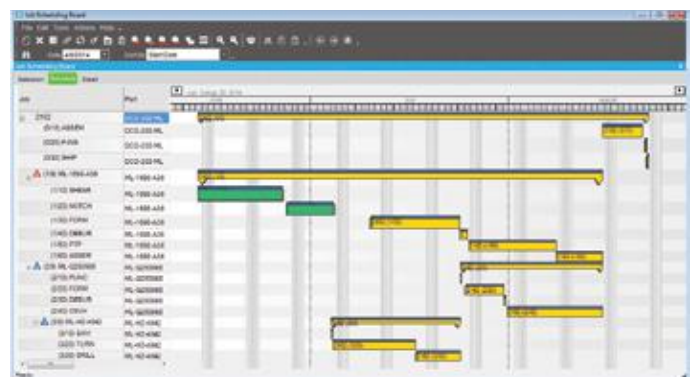
Manipulate the schedule directly from a sophisticated, drag-and-drop visual scheduling board.

Planning and Scheduling

Production Scheduling Board

Easily manipulate the schedule with drag-and-drop and drill-down techniques for Multilevel assemblies and operation details. A main control center for scheduling resources graphically displays schedule by job, resource, resource group, or entire plant. Dynamically change the timeline of the view to see short-run operations and analyze the impact of long running operations instantly.

Alerts

View indicators, such as late status and material availability, to proactively alert the master scheduler to potential problems in the schedule. Optionally customize colors to denote actual, what-if, or delinquent load by job or operation.

Finite Scheduling

Schedule and reschedule with flexible, finite real-time schedule capabilities for a single job and plant-wide global finite capacity. Features include job locking for key operations or jobs, user-defined priority, and capacity load leveling by resource and resource group.

Start Time

You can define a Start Time for this scheduling process. This feature lets you run Global Scheduling during the current date, as you can indicate from what specific point in time the global finite scheduling process will begin. Previously this function only allowed you to begin Global Scheduling on the next day.

Drag-and-Drop

Drag-and-drop scheduled load hours forward or backward to alleviate the overload and effectively reschedule when faced with overload conditions at critical resources or resource groups.

Operation Complete Quantity Displayed

The Job Scheduling Board, Resource Scheduling Board, and Multi-Resource Scheduling Board all have an Operation Complete Quantity field on their Detail sheets. This field displays the number of parts that are so far complete on the current operation.

Operation Complete Time Displayed

Both the Job Scheduling Board and Resource Scheduling Board display the Operation Complete Time value after you move an operation. This shows you the amount of time that is left to complete the operation.

Overload Informer

Display each date and resource/resource group, where scheduled hours exceed capacity based on what-if or actual job schedules. Access resource, resource-group, and job scheduling information to review the causes of an overload and make schedule changes as needed.

Multilevel Assemblies

Manage complex assemblies by matching the schedule to actual production output. From branch- and component-level rescheduling to final assembly, Epicor helps to ensure that all components are on time and that nothing slips through the cracks. Visually explode high-level components to view lower-level component schedules.

What-If

Schedule jobs in a what-if mode, with the ability to analyze potential bottlenecks before finalizing the actual schedule.

Setup Grouping

Use setup groups to streamline your setup processes. Dynamically assign grouping based on the criteria you define.

Capabilities with Zero Priority

When you schedule by capability, the Scheduling Engine selects resources by the Priority value defined for each capability. You can assign a zero value to a capability's priority. Any resource that is defined by this zero priority will not be selected by the Scheduling Engine. It will, however, be available to use as a resource on the Start Activity or Labor Entry windows.

Change Impact

View the potential changes for cost and throughput to the schedule after creating what-if scenarios.

Dual Resource Constraints

Use a secondary resource constraint (e.g., a tool or employee) in finite capacity scheduling in addition to the primary resource.

Conditional Forward Schedule

Optionally allow the system to perform a forward schedule based on a start date of today when performing a backward schedule if a current date is encountered.

Resource Group

Define an unlimited number of resources within a resource group. Resource groups can be used in the planning process with the actual resource assigned automatically based on availability of individual resources. Resources may have unique calendars, and values for hourly/daily capacity, queue-and move-time.

Finite Load Horizon

Prevent the schedule from making adjustments too far into the future—potentially impacting material purchases and resource allocations—with finite load horizons (e.g., time fences or cutoff dates) for finitely scheduling load on the resource.

Resource-Based Schedule

Develop a schedule for each individual resource deployed in the schedule.

Reschedule Delta

Optionally automate the system's response to parts that are planned to be early or late by a threshold number of days.

Rough Cut Scheduling

Keep an eye on the future with Rough Cut Scheduling. Rough Cut Scheduling is deployed to offer visibility of future production without taxing system resources.

Scheduling Factor Send Ahead

Start-to-start scheduled operations or operations scheduled to begin at the same time can be staggered based on an offset factor that is calculated by number of pieces or a percentage of time allocated.

Scheduling Blocks

Account for periodic processes with scheduling blocks. Scheduling blocks offer definition of periodic setup needs such as tool changes or other processes.

Global Scheduling Component Process

The Global Scheduling process is divided into three components. You must run these components in the following order to globally schedule your jobs:

▶ Calculate Global Scheduling Order: This program is a setup process you must run before the Global Scheduling process. Each time this process is run, it will schedule any job that is a candidate for the Global Scheduling process. This process determines if each job will be early or late. This Early Days or Late Days value is then compared against the Priority code value on the job to determine a job priority sequence. The Global Scheduling process will then schedule these jobs in using this generated job priority sequence.

▶ Adjust Global Scheduling Order: This is an optional component you can run. Launch this program to review the job priority sequence that was generated through the Calculate Global Scheduling Order process. You can use this program to manually change the sequence through which these jobs will be scheduled during Global Scheduling.

▶ Global Scheduling: Run this process to schedule the jobs. All the jobs selected by the Calculate Global Scheduling. Order process will be placed within the schedule, either on the actual schedule or on a What-If schedule. The jobs will be scheduled in order using either the sequence generated by the Calculate Global Scheduling Order process or the modified sequence you changed within the Adjust Global Scheduling Order program.

Material Constraints Displayed

Both the Multi-Resource Scheduling Board and the Job Scheduling Board indicate which materials are constrained. On both scheduling boards, the Related Materials grid now contains additional columns that display this information. One column indicates whether or not the material is constrained. The other columns define the purchase order, job, and lead time linked to the constrained material.

Advanced Planning and Scheduling

Available as an extension to Scheduling, Epicor Advanced Planning and Scheduling incorporates the strength of the Scheduling engine and enhances it with advanced functionality such as multiple constraint scheduling, a wide range of scheduling methods, visual drag-and-drop scheduling, capability and dependent capability-based scheduling, real-time capable-to-promise functionality, and advanced material planning functionality.

Capable-to-Promise

Easily manage customer expectation with real-time capable-to-promise functionality in Order Management. Enabled with APS, Epicor capable-to-promise uses the scheduling engine to determine accurate promise dates and offers order processing single-click confirmation or order cancellation based on the projected due date.
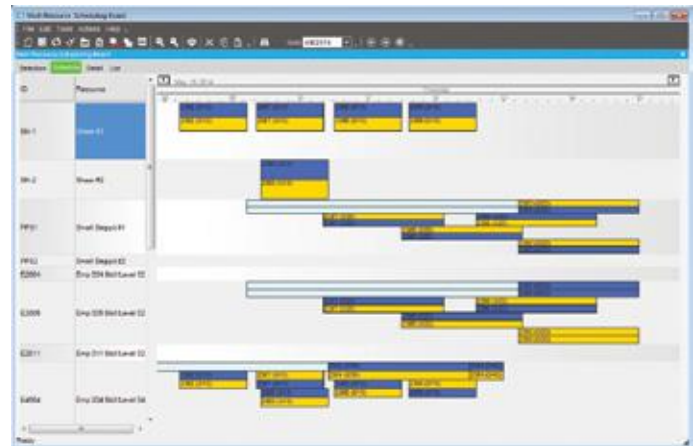
Consider production resources and create a visual finite schedule for improved schedule accuracy.

Multiple Resource Scheduling Board

Easily manipulate the schedule with drag-and-drop manipulation and drill-down techniques for multilevel assemblies and operation details. A main control center for scheduling resources graphically displays schedules for a group of resources in one screen. Dynamically change the timeline of the view to see minute operations and analyze the impact of long running operations instantly. Add memos to a schedule on the Multi-Resource Scheduling Board about any aspect of a current schedule.

Multiple Constraints

Set up every operation with multiple constraints or resources (e.g., machines, tools, skilled labor, raw materials, or available subassemblies).

Resource Eligibility
Define resources within a specific resource group with individual characteristics to improve scheduling accuracy.

Automated Scheduling by Capability
Define a capability or skill level that can be tied to multiple resources rather than a resource group or individual resource in the planning process. The APS engine then determines, based on the available resources, which individual resource to schedule for the operation.

Dependent Capabilities
Link dependent capabilities that the scheduling engine schedules along with the primary capability when operations require dependent skills to perform the operation.

Finite or Infinite Capacity
Define each resource with either finite or infinite capacity. When a piece of the schedule is moved, the resource is rescheduled according to its type.

Minimum WIP Scheduling
Use a unique scheduling algorithm designed to minimize work in process by scheduling a job to ship as early as possible. APS then back schedules to start working on the job as late as possible.

Dimensional Planning
Schedule by volume and quantity using dimensional planning that is not time constrained.

Rate-Based Scheduling
Schedule cells based on production throughput rates rather than time.

Material Constraints
Consider material availability as a scheduling constraint. Integrated directly with Inventory and Purchasing, the APS system knows when material is due and schedules accordingly.

Advanced Material Planning
Increase throughput by considering material and component availability as a constraint. Advanced material planning, an integral feature of APS, facilitates intelligent stocking and procurement of material requirements.

The schedule function recognizes materials earmarked as constraints, gives the master scheduler material availability, and considers supplier calendars for a more realistic schedule.

Change Impact Analysis
See the immediate impact of proposed changes on other orders to make informed decisions about desired changes.

Time Adjustment
Automatically take into account resource utilization and resource group efficiency for more accurate load calculation.

Optimization Rules
Generate a schedule based on rules assigned to individual resources.

Balanced Optimization
Concurrently consider priority, slack time, and setup time when determining load balance.

Single Cell Scheduling
Schedule an entire job or assembly within a single work cell.

Unlimited What-If
Create unlimited what-if scenarios to view the effect of changes on your shop floor.

Multi-Plant Communication
Help to ensure that interdependent plant schedules are coordinated.

Multisite Management

Best-in-class enterprises are outpacing their competitors today with new initiatives to drive out redundancies and improve lead times. Maximizing the use of your internal supply chain can be a key differentiator. Not only are manufacturers and distributors looking for new tools to oversee multiplant operations, they are also looking to maximize the use of existing resources. Alternative production methods management helps optimize the production processes for specific parts in each plant, based on the resources available. Another optimization tool includes the transfer of material or semi finished components to another plant for completion.

Project Management

Project success is critical to bottom-line profitability, yet many businesses struggle with projects running behind schedule or over budget. Project scope needs to be managed constantly with variations identified immediately. Epicor Project Management is a comprehensive solution for project managers who plan and execute simple or complex projects that can require intricate multilevel phases as well as strict costing and complex billing. Embedded within the robust capabilities of Epicor, Project Management utilizes the detailed estimation, planning, scheduling, costing, and supply chain logistics of Epicor for complete control and analysis of any project. Resource Management provides a detailed representation of resource capabilities and availability. Time and Expense Management and Approval software help to ensure projects accurately reflect true costs and the comprehensive Billing and Revenue Recognition functionality guarantee compliance with contract requirements and accounting standards. At all times, throughout the whole process, embedded Project Analysis and reporting combined with Business Process Management provides accurate and up-to-date status information and meaningful alerts. To be successful in a project environment, project management must permeate every aspect of your business solution. Companies that are able to efficiently meet the demands of managing their portfolio of projects have a distinct advantage over their competition; they have a better understanding of their costs so they can bid and win business with confidence.

Project Planning and Analysis

Supporting the needs of industries with a project orientation, Epicor Project Planning provides flexible Work Breakdown Structure (WBS) capabilities including multilevel phases within a project. Fully embedded within Epicor, Project Management offers the robust Epicor scheduling engine for complete visibility and management of the project schedule. Additionally, the ability to accumulate and roll up costs for a WBS Phase to the main project, as well as supporting budgets, estimated completion values, and calculated, estimated and actual costs accumulated at the WBS Phase level or at the project level. The WBS can either become the basis for project invoicing, or a separate billing schedule can be created using Project Billing for complex contract management. For complete visibility of costs and cross analysis, all of the costs are rolled up through the project structure. Added analysis offers cross-project analysis of key elements such as a material class, burden or labor type.

Bidirectional integration with Microsoft Office Project gives project managers an additional tool to use to easily manipulate the schedule and simplify the planning of any project.

Project Generation
Define all project components as part of a logical, cohesive plan. A project can be generated at anytime including at the quote, sales order, or after the contract has been signed with the customer. Define the default project approvals method and workflow group.

Project WBS Phases
Define the work breakdown structure for the project. Automatically create jobs for the collection of costs and management of operations, define the hierarchy for phase cost accumulation. Define multiple operations, their sequence, defined resource roles and planned hours as required against each phase job. Optionally define workflow and approvals overrides at the phase level.

Effectively manage the project work breakdown structure no matter how complex. Ease the burden on project managers by providing access to everything relating to the project in a single place.
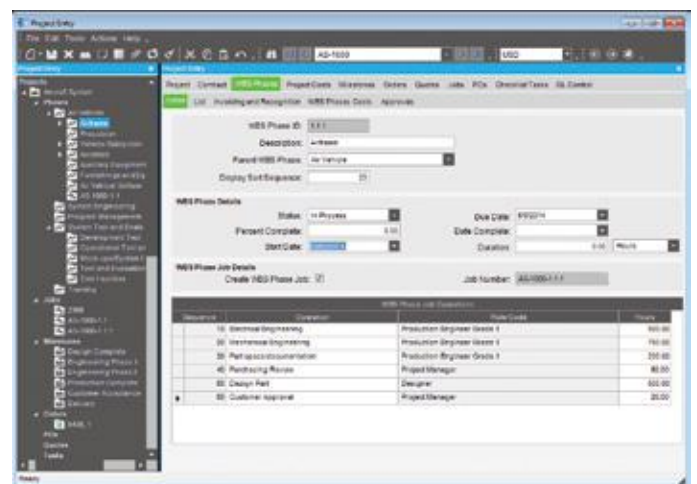
Microsoft Project Integration

Epicor supports a bidirectional integration with Microsoft Office Project. Create new or import and update Epicor project phases and tasks from within Microsoft Office Project then upload them in Epicor. Tracking unique data or descriptions within your project, Project Management lets you upload them too. Optionally use template projects and project phases for faster project planning.

Template Projects

Create a library of template project WBS structures to represent the various methodologies or requirements of recurring projects. Project structure and contract details can be manipulated in duplicated projects to reflect any nuances on a particular engagement.

Milestones

Define project milestones, either associated with particular jobs or WBS phases or defined dynamically (e.g., for example cumulative costs based on selective cost elements).

Checklist Tasks

Define checklist tasks, assign due dates and associate with particular individuals. Associate multiple internal contacts with a project task to route e-mail alerts when important project events occur (e.g., when a particular project milestone is completed) in addition to identifying critical project personnel.

Project Schedule

Calculate project start and due dates by project, by phase, by jobs within a phase or by job assembly, all the way down to individual job operations. A task bar on the scheduling screen displays the job operation's current percent complete. Labor reported against the job operation incrementally increases the percent complete total and decreases the remaining total hours. Projects can be scheduled using either the Scheduling system or Microsoft Project.

Project Budgets

Dynamically calculate quoted costs and current estimated costs based on the WBS as well as manually entered budgets and estimated completion values.

Project Warehouse

Assign specific inventory to a project through the projects unique inventory location.

Project Attachments

Attach drawings, specifications and any other documents that are associated with the project to help ensure all members of the project team have ready access to project documentation.

Business Process Management

Supporting strict standards in process definition, Epicor Business Process Management (BPM) gives project managers a tool to define and automate their unique business processes for project definition, approvals, and project standards, through to delivery and finance.

Responsive Visibility

Modify a project at any time, offering ultimate flexibility to the project manager. User-defined workflows and check off/approval requirements are standard. Throughout its lifetime, all aspects of the project are entirely transparent.

Project Analysis

With predefined project cost analytics, plus user-defined analysis codes, consolidate and extract any project cost metric—including complete rollups of all cost transactions related to the project or project phase (e.g., job materials, job operations, burden elements, quote estimates, and sales order information).

Advanced Project Analysis

Supporting the needs of many industries, Project Management offers robust data analysis and cost rollups as well as project analysis "snapshots" for progress comparatives against historical.

Cost Analysis

Begin cost analysis with the quote. Quoting allows project analysis of potential projects in the design stage, before the project even begins. The project tracker displays real-time costs for all associated transactions, at the project or phase within the project. For tighter in process management of project costs, project managers can compare to manually entered budgets, maintain cost to complete metrics, and review system-generated cost to complete metrics.

Revenue Analysis

Easily perform revenue analysis for progress or milestone billing. Epicor Enterprise Performance Management (EPM) streamlines the process with user-defined buckets for revenue analysis (e.g., quoted revenue, current revenue, quoted margin, and current margin).

Revenue Recognition Workbench

Use the Revenue Recognition Workbench to automate revenue recognition and process the various milestones and contractually defined billing points on a project. You can generate journals for revenue recognition based on the costs produced from the Project Analysis during the life of the project. The journals can be reversed once the project is completed.

Invoicing

Project Management allows you to generate progress and milestone billing, so you can invoice your customer and optionally defer the revenue and cost of sale, recognizing them at various stages in the project. Invoices can be generated based on a fixed date, fixed amount, user-defined stage of project completion, or user-defined cost-to-date. More complex contract arrangements can be defined using the sophisticated options available in Epicor Project Billing

Social Project Management

Social Project Management gives the internal and external project community visibility into the events of the project, as they happen. This allows teams to achieve transparency as to project progress and status and enables smarter and more efficient collaboration.

Epicor Social Enterprise provides access to those involved with your projects to subscribe, follow and trend what matters most to the team.

Rather than relying on the team alone, why not leverage the full expertise of an organization or other social network. Project teams are social entities, embedded in multiple social networks internal and external to the organization. Each member of the team has unique social connections inside and outside the organization.

Epicor Social Enterprise allows the project team to tap into those social networks for expertise (and even resource time) to complete their goals. It allows a project manager to see the social network of their team and leverage those connections to better communicate with the greater project community.

Sharing valuable knowledge helps project teams leverage the full expertise of an organization or other social network.

Project Billing

The advanced invoicing methods available in Epicor Project Billing provide the capability required to handle the commercial terms negotiated during the project bid process. Project Billing can vary project by project, ranging from shipment-based billing to negotiated rates and the establishment of a billing structure that can be separate from the project WBS. This flexibility enables project managers to focus on managing project delivery in the most efficient way while also handling accurate billing in accordance with a customer defined schedule.

Contract Management

Maintain the contractual arrangements for a particular project. Record details of the customer together with key contract dates, values, currency definitions, project manager, and the appropriate revenue recognition method. Define source of costs rates to be applied to the project contract; hierarchical, project, employee or role.

Configuration settings can be used to help ensure that only resources with the specific role codes defined in the project contract are able to work and record time against a project. This can be extended to record the specific resources that are approved to work on a particular project contract.

Invoice ceilings can be established to limit the amount billed for a particular role code, resource or supplier. The contract defines the system behavior when such ceilings are met—either continue or cease invoicing for the defined resource. Epicor BPM can be used to monitor as ceilings are approached.

To cater for the needs of certain industries, notably contracts dealing with the U.S. Department of Defense, Burden Sets and the sequence in which they are applied may be maintained and defined against the project contract.

Variations

Record the details of contract and project variations. Optionally use Epicor BPM to define the workflow that needs to be associated with variations to help ensure appropriate communication to protect revenue and manage costs.

Invoicing Method

Define the appropriate invoicing method negotiated for the project. One invoicing method can be defined for the entire project or each phase can have a unique method defined. Invoicing can be based directly on project activity (e.g., customer shipment, achievement of defined milestones, time and materials or cost plus). Alternatively, the contract may be defined as incurring a fixed fee, in which case invoicing is defined in accordance with a contract schedule.
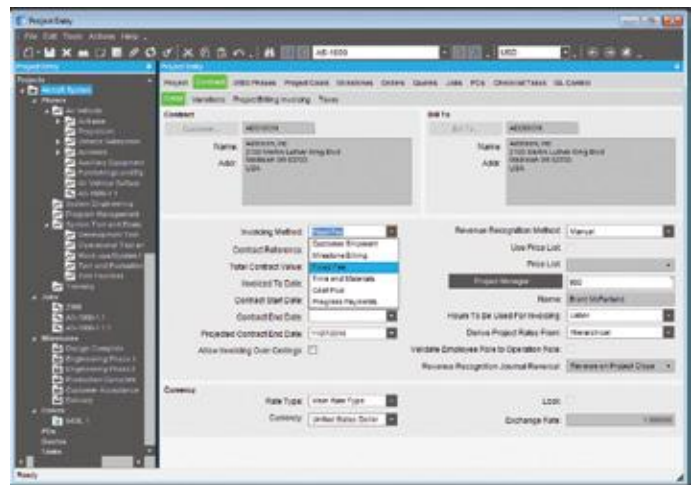
Comprehensive contract management provides a range of invoicing options to cater to any billing situation.

Customer Shipment

The customer shipment invoicing method is the equivalent of invoicing against a sales order. As project deliveries are shipped, a customer invoice is raised in accordance with the appropriate price list.

Project Management

Milestone Billing

Milestone billing enables invoices to be raised on the achievement of defined milestones. Invoice amounts are either based on costs to date, with a markup, or a fixed amount.

Time and Materials

With Time and Materials billing, the project is periodically billed on the basis of the approved time and materials incurred during the invoice period. The project contract allows for the definition of the charge rates for project resource roles as well as the pricing arrangements for materials to help ensure accurate billing. Project contract additionally allows for the appropriate derivation of rates, which can be hierarchical or specified in the project, resource, or resource role.

Cost Plus

The cost plus invoicing method works on the normal cost rates for the labor and burdens which are then marked up by contract defined percentages to arrive at a total invoice amount. Each billing may also have a monthly fixed charge applied or a one-time management fee.

Fixed Fee

With a fixed-fee project, the contract value is billed in accordance with an agreed schedule, starting from the contract start date. Billing frequency determines how regularly bills are prepared for example monthly, quarterly, or annually.

Progress on a fixed-fee project is measured against items agreed to in the contract. Such measured work can either be linked directly to the project WBS or managed separately. During the life of the project progress claims (also known as applications for payment) are raised and processed in accordance with the fixed-fee billing schedule.

Fixed-fee projects additionally allow for the definition of a Defect Liability Period and Retention percentages. Where retention has been defined, a percentage of each progress claim is held back until the end of the liability period.

Progress Payments

The progress payment method of project invoicing provides the ability to raise periodic invoices against deliveries or against progress on a provisional contract. An agreed percentage of incurred costs may be invoiced periodically up to a nominated ceiling. BPM alerts can be used to monitor progress against the ceiling to provide early warning of a need to renegotiate.

When the contract has been finalized, a process releases invoices for any shipments made, consuming any progress payments made to date.

Resource Management

Epicor Resource Management provides the ability to define all resources available whether they are employees, contractors, equipment or machinery. Comprehensive calendars, resource capabilities, roles and capacities can be defined which are then referenced throughout Epicor. Resource management additionally provides the comprehensive costing and default burden and billing data used throughout the application from planning and scheduling to labor bookings. Contractual role requirements and a clear separation of direct and indirect labor are supported in accordance with the specifications of the most demanding contract.

Time Management

Time Management in Epicor provides a highly configurable environment for the recording and management of time across projects, jobs, service orders and internal codes. A range of entry options are available each reflecting the nature of a particular transaction. Time can be entered online, on the shop-floor, in the office or from a mobile device resulting in quick and accurate recording.

The reliability of time recording is reinforced through an array of task-centric entry options which focus on the critical data required in each context. Additional configuration options help to ensure that users only have access to authorized jobs and booking codes, with a clear separation between direct and indirect labor entry.

A flexible approvals process provides the security to help ensure that transactions are properly authorized and backed up by a comprehensive audit trail.

When implemented alongside Expense Management, both Time and Expense Management are available from a single menu option.

Access from Calendar

A familiar calendar tool enables users to navigate to the appropriate period for time entry. Timesheet status by day is graphically displayed providing a clear view of missing entries, together with the submission and approval status of time. To create a new time entry, the user simply clicks on the appropriate start time to enter the required details.

Time records can be entered and submitted as the time recording period progresses, or submitted at the end of each time period. Reports and alerts can be configured to alert users of missing time records.

Project Management
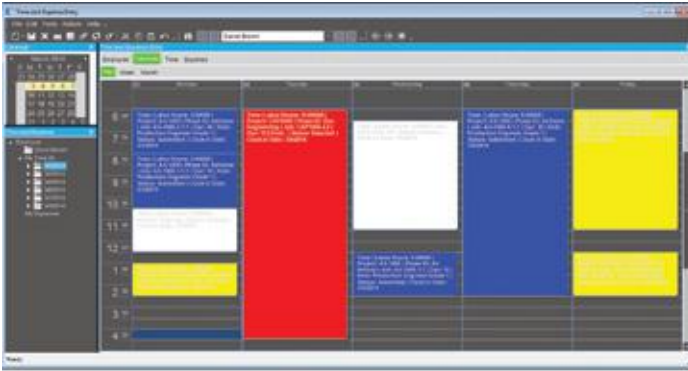
Calendar provides clear visibility of missing timesheet entries. The colored blocks indicate the approval status of each time transaction.

Direct Labor Entry
Quickly enter production information for jobs including quantities, clock in/out details and location information. Direct Labor entry defaults to the current date, but any other date can be selected using the Outlook-based style calendar widget.

Labor Entry Using MES
Epicor Manufacturing Execution System includes a dedicated interface for shop-floor entry of job and Time Management information. Configurable controls allow such entries to route through the approvals process if required.

Daily Time Entry
Daily Time Entry provides tailored entry depending on the labor type. Project, Indirect and Service each provide direct access to the appropriate details resulting in complete and accurate time submissions.

Timesheet List
Timesheet List provides a spreadsheet entry format offering quick and reliable time entry, particularly where a task is worked across multiple days in the timesheet period. Entries can be copied from previous weeks or pasted in from a spreadsheet, if desired.

Indirect Time
Indirect time can be entered using Epicor Time Management. Indirect codes are associated with General Ledger Controls to drive accurate financial time reporting.

Quick Codes
Quick Codes are definable by each user to represent regular combinations used in time entry. Quick Codes reinforce accurate Time Management and minimize the effort required for data entry.

Comments
Multiple comments can be added during time entry to provide backup details behind each transaction. These are also available to communicate through the approvals process.

Secure Configuration
Configuration options provide the control to enforce the clear distinction between direct and indirect workers time recording. Role codes can be defined to further control time recording to approved resources.

Contextual Approvals
The level of approval required for each time transaction is determined by the context of the record ensuring fast and efficient approvals. Time can be auto-approved, routed to the appropriate supervisor or routed to the project manager or other nominated individuals with control down to the project phase, if required.

Advanced Workflow
Advanced approvals workflow options allow workflow groups to be established to route approvals through multiple levels in a hierarchy or routed to groups for approval.

Approvals Queue
Approvals views provide supervisors and managers with all the information required to help ensure efficient approval of outstanding time records. If configured, the approvals queue can also incorporate records entered through MES labor bookings. Submitted records may be modified or rejected with a full audit trail. The queue can be filtered and sorted as required, comments may be viewed and transactions valued to monitor the full impact at the time of approval.

Business Process Management
Complementing the approvals process, Epicor Business Process Management may be configured to alert users and managers of missing time records and outstanding approvals as required, ensuring complete and accurate recording of time.

Proxy Users
Timesheets are normally entered and approved by each user. In addition, nominated individuals can be defined to enter or approve time transactions on behalf of other users. A full audit trail is provided to identify such proxy transactions.

Reporting and Analysis
Full reporting and analysis of time records and approvals is provided through a variety of reports and trackers.

Audit Trail
The date/time and user details of each time transaction is recorded to provide clear visibility of entry and approval, including proxy details as required ensuring compliance with internal procedures and external requirements such as the US Defense Contract Audit Agency (DCAA) guidelines.

Mobile Time Management

Mobile Time Management allows you to easily take care of business while traveling by capturing your time while on the go. By reducing the need to remember and enter when you have access to Epicor ERP, you will have fewer errors and missed billable time. Mobile Time Management is built using process driven menus and utilizes standard consumer devices using Apple iPhone, iPad, Android phones and tablets, and windows mobile devices. The application is cost effective to deploy and easy to use. Applications will also work in a disconnected state and allow the user to enter data and sync back when they have a connection.

Mobile Time Management reduces missed billable time.

Expense Management

Expense Management in Epicor helps eliminate administrative effort, increasing efficiency by providing a secure environment for the recording and management of multicurrency expenses across projects, jobs and service orders as well as purely internal expenses. Expenses can be entered online, in the office, or from a mobile device, resulting in quick and accurate recording of expenses.

A flexible approvals process provides the security to help ensure expenses are properly authorized, backed up by a comprehensive audit trail.

Approved transactions flow directly into Accounts Payable for fast and efficient processing and reimbursement.

When implemented alongside Time Management, both Time and Expense Management are available from a single menu option.

Access from Calendar
A familiar calendar tool enables users to navigate to the appropriate day for expense entry. Expense status is graphically displayed providing a clear view of the submission and approval standing of Expenses. To create a new expense entry the user simply clicks on the appropriate day to enter the required details.

Expense records can be entered and submitted as the period progresses, submitted at the end of each period or associated with a specific expense claim reference for easy reconciliation with reimbursements. Reports and alerts can be configured to alert users of missing time records.

Detail Expense Entry
Detail Expense entry allows the user to enter full details for the expense including tax and currency information together with payment type.
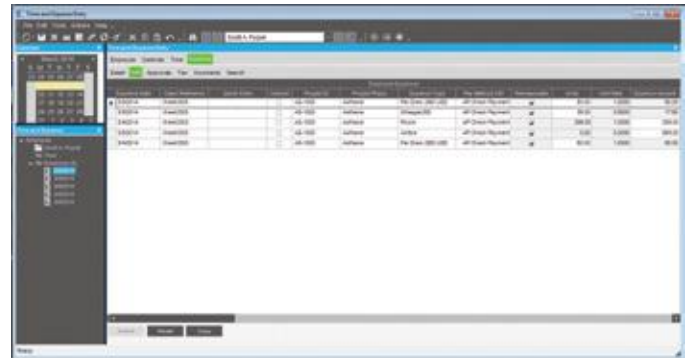
Quickly enter expenses in a familiar spreadsheet layout. Submit for approval and efficient reimbursement.

Expense List
Expense list provides a spreadsheet entry format offering quick and reliable expense entry. Entries can be copied from previous weeks or pasted in from a spreadsheet, if desired.

Internal Expenses
Internal expenses can be entered using Epicor Expense Management. Expense codes are associated with General Ledger Controls to drive accurate financial reporting.

Quick Codes
Quick codes are definable by each user to represent regular combinations used in expense entry. Quick codes reinforce accurate Expense Management and minimize the time required for data entry.

Comments
Multiple comments can be added during expense entry to provide backup details behind each transaction. These are also available to communicate through the approvals process.

Configurable Expense and Payment Types
Regular and unit-based expense types can be established as well as multiple payment types to help ensure compliance with contract provisions.

Contextual Approvals

The level of approval required for each expense transaction is determined by the context of the record ensuring fast and efficient approvals. Expenses can be auto-approved, routed to the appropriate supervisor, or routed to the project manager with control down to the project phase, if required.

Advanced Workflow

Advanced approvals workflow options allow workflow groups to be established to route approvals through multiple levels in a hierarchy or routed to groups of managers for approval.

Approvals Queue

Approvals views provide supervisors and managers with all the information required to help ensure efficient approval of outstanding expense records. Submitted records may be modified or rejected with a full audit trail. The queue can be filtered and sorted as required and comments viewed at the time of approval.

Efficient Reimbursement
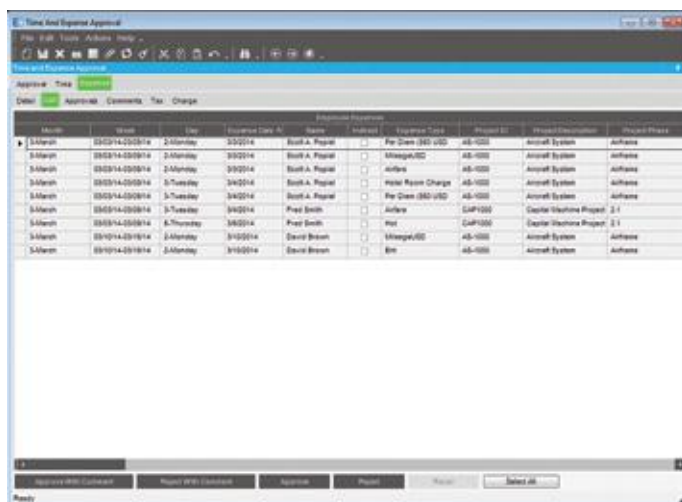
Once fully approved, expense transactions, group by employee claim, are passed to Accounts Payable for final approval and reimbursement eliminating any requirement for transaction reentry.

Business Process Management

Complementing the approvals process, Epicor Business Process Management may be configured to alert users and managers of outstanding approvals as required, ensuring complete and accurate recording of expenses.

Proxy Users

Expenses are normally entered and approved by each user. In addition, nominated individuals can be defined to enter or approve expense transactions on behalf of other users. A full audit trail is provided to identify such proxy transactions.

The approvals queue enables approvers to stay on top of outstanding transactions.

Reporting and Analysis

Full reporting and analysis of expense claims and approvals is provided through a variety of reports and trackers.

Audit Trail

The date, time, and user details of each expense transaction are recorded to provide clear visibility of entry and approval, including proxy details.

Mobile Expense Management

Mobile Expense Management allows resources to enter expenses as they happen, reducing the need to remember and enter when they have access to ERP.

Mobile Expense Management utilizes standard consumer devices on Apple iOS and Google® Android™, and is built using process driven menus. The application is cost effective to deploy and easy to use. Epicor expense management also utilizes the device camera, if one is available, allowing users to attach pictures of receipts at the time of entry. This speeds up the approval process. Applications will also work in a disconnected state and allow the user to still enter data and sync back when they have a connection.

Mobile Expense Management improve expense accuracy and timeliness.

Production Management

▶ Job Management
▶ Advanced Production
▶ Lean Production
▶ Manufacturing Execution System
▶ Advanced MES

▶ Enterprise Manufacturing Intelligence
▶ Quality Assurance
▶ Enhanced Quality Assurance
▶ Advanced Quality Management

Whether you manufacture complex solutions or simple products, you need strong production control in order to build a competitive advantage. As the global marketplace continues to shrink profit margins and customers become more demanding, businesses are looking for agile solutions that can provide the infrastructure they need to respond quickly and efficiently. Epicor offers a comprehensive solution for make-to-order, mixed-mode, make-to-stock, engineer-to-order, and configure–to-order manufacturers; including light assembly features for distribution businesses. Modular in design, the production control suite of modules include Job Management, Lean Manufacturing, Manufacturing Execution System (MES), Quality Assurance, and Advanced Quality Management.

Job Management

Job Management is a comprehensive production control solution designed specifically for the planning, routing, scheduling, costing, and tracking of products; including assembled, manufactured, and semi-finished products. It includes innovative tools for better planning and costing with historical run analysis that compares estimates to actuals on a run-by-run basis. With Epicor Job Management, users can more easily identify wasted processes and continuous improvement opportunities on the production floor for maximized profitability.
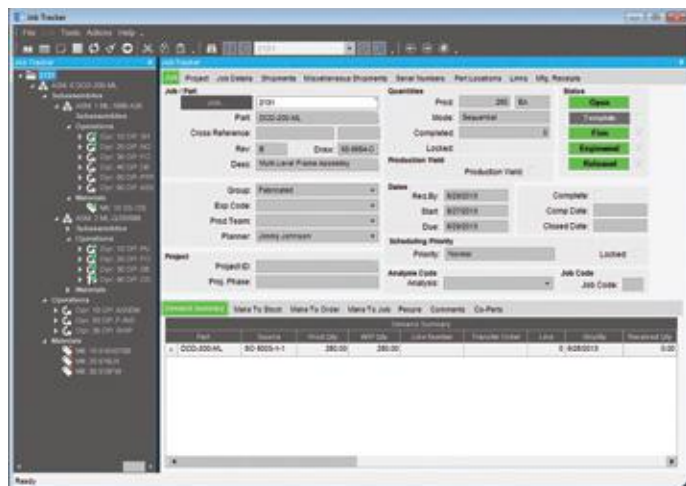
Provide detailed information to the plant floor about every aspect of a job.

Planning Workbench
Access all job related actions in a single view—the creation of new jobs, changing job requirements to match changing demand, and allocating and reallocating jobs to satisfy changing customer demand. The planning workbench allows seamless access to the scheduling board for more detailed job management.

Job Manager
Quickly review the relationship between production jobs and demand. Make changes to the production plan to accommodate new and changing demand.

Production Planners Workbench
The Production Planners Workbench is a dashboard that provides an overview of the material shortages of the selected jobs. Although this information is already available in each job this overview gives the job planner a tool to quickly gather information for multiple jobs at once.

Job Costing
Compare actuals to estimates online, review job costing for materials, material burden, subcontracting, operations (labor/burden), and compare projected and actual billings for profitability analysis. Job costing can be performed on a job-by-job, customer, part product group, or overall company basis.

Order-to-Job Linking
Handle one job or one delivery, one job or multiple deliveries, blanket production runs, and internal work orders to build parts to finished goods inventory.

New/Change Order Notifications
Verify that orders or changes don't fall through the cracks for viewing and selecting new orders and change orders from job entry. Optionally track all job changes via user ID, date and description.

Drag-and-Drop Interface
Simplify the planning process. Use a tree interface to easily drag-and-drop components, operations or direct materials from another quote, BOM, or previously run job.

Planned Overproduction of Assemblies
Produce and auto-receive overproduction quantities to inventory.

Yield Scrap

Everyone has it. Yield Scrap. This functionality offers the ability for scrap reporting at an operation to affect the estimated production quantity of subsequent operations if the scrap exceeds a predetermined scrap allowance. Some users may just want a warning others may want automated predefined actions.

Assemblies

Produce routings, costing, and tracking of single or multiple-level parts.

Scheduling

Schedule jobs based on forward, backward, what-if, finite, and infinite capacity.

Backflush

Backflush labor and/or materials for a single assembly, branch, or an entire job.

Job Tracker

Review a specific job, and check the status of all assemblies, operations and materials, including subcontract status.

Productivity

Track and analyze efficiency and utilization figures by employee, operation, work center, and department.

Quality Control

Extensively track and analyze scrap, rework, and added operations.

Material Shortage Indicator

Query material availability at the time of job entry to determine whether jobs can be started within the scheduled time period.

Advanced Production

Advanced Production deploys batching technology that enables users to group multiple parts or operations together for key production processes. The result of this batching process is a single reporting entity or job for simplified scheduling, tracking, and reporting of labor and materials on the plant floor.

The functionality of Advanced Production is available in the job planning and resource scheduling functions within Epicor. Both planned and "on-the-fly" grouping provides powerful flexibility to end users. Additionally, users can select to plan sequentially—one operation after another or concurrently—operations to be complete at the same time for nested operations.

Support For Co Product Production

Offers simplified production of co or dependent products in the same production run.

Support for Nested Product Production

Offers simplified production of nested or products of the same material or process in the same production run.

Part and Operation Batching

Easily link multiple operations from the same part of different parts to be run either sequentially or concurrently.

Visibility of Production Batching

Single source production enables full visibility and tracking of source operations and parts.

Accurate Cost Control

Material and production costs are applied accurately to multiple jobs as production is complete. Simplified labor entry allows plant floor employees to enter quantities for multiple parts in a single step.

Simplified Plant Floor Interface

Single reporting entity enables multiple part quantities to be entered in a single plant floor interface while accurate labor and burden cost is accurately applied to each batched part and operation.

Concurrent or Subsequent Flexibility

Flexible to handle multiple production requirements, user can select to either link parts and operations concurrently—to be run one after another or concurrently—at the same time.

Single or Multiple Operations

Flexible to handle multiple production requirements, user can select either a single operation for linking or to link an entire job.

Lean Production

With increased global competition and the demands of an online supply chain, customers have more influence than ever before. Customers are, demanding greater product flexibility, smaller, more frequent deliveries and higher product quality, at a lower price.

Businesses are widening the scope and focus of lean principles to encompass all processes that contribute to the bottom line. The true benefits of lean thinking will only be fully realized when the entire enterprise adopts the lean ideology.

Specific functionality has been developed in Epicor for plant floor operations that are adopting work order less Kanban manufacturing strategies in part or fully to pull rather than push products through the manufacturing process. Epicor Lean Manufacturing Kanban functionality supports this.
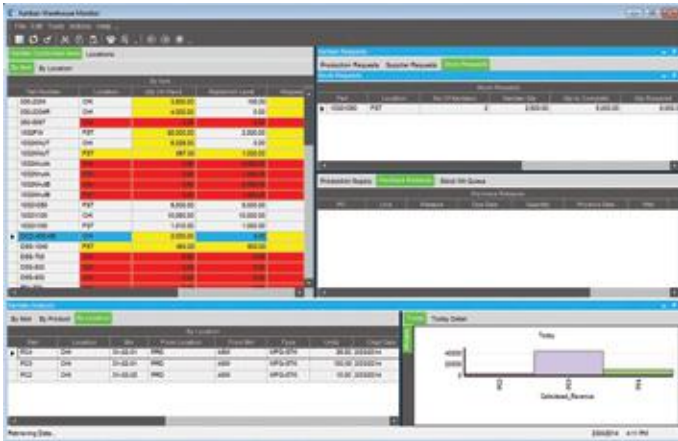
Manage electronic queues for Kanban control with the Kanban Monitor. Optionally display on the plant floor information about current Kanban records in a dashboard format.

Manufacturing Without Work Orders (Kanban Flow)

Epicor embedded Kanban functionality (i.e., a signal to manufacture or move product) offers the functionality required to manage several types of systems for Kanban control. As inventory levels or order demand require additional product, Kanbans, such as manufacturing real-time Kanbans, manufacturing flow Kanbans, purchase real-time Kanbans, and stock replenishment Kanbans, are automatically requested. The Kanban manages the stocking and order demand for parts flagged as needing Kanban control. User-defined rules enable parts to be flagged for Kanban control at the part, warehouse, or individual bin or cell location level.

Cell-based Inventory

Manage, plan, and replenish materials within a cell.

Real-time Manufacturing Kanban

Eliminate work orders and reduce on-hand inventories as parts are electronically triggered for replenishment as needed with real-time manufacturing Kanbans. Instead of planning for each order that is processed, parts are pulled through production as inventory or cell stocking levels fall below minimums. The cell is visually queued to produce based on the Kanban quantity for the part at its warehouse, bin or cell location.

Manufacturing Flow Kanban

View future demand to dynamically calculate future replenishment Kanbans with the manufacturing flow Kanban. This gives downstream cells and suppliers visibility of future demand (although the actual Kanban events may differ during execution). As Kanbans are acted on, the downstream demand requirement is dynamically updated. All cells and suppliers have up-to-date visibility of future demand.

Real-time Stock Replenishment Kanban

Move inventory as it is needed in a particular manufacturing cell, shipping area or customer consignment location with the real-time stock replenishment Kanban using automatic triggering of stocked inventory.

Real-time Purchase Kanban

Use the real-time purchase Kanban to replenish directly from the supplier and notify purchasing that a stock replenishment is required. Automatically send an e-mail to the supplier requesting additional inventory against an open purchase contract. Inventory can be received to the main stores, or directly to the production floor. Real-time purchase Kanban automates the replenishment of material from vendors and provides for visibility of current supply requests.

Automated Material Flow

Authorize supplying cells to make a predefined quantity of an item being "pulled" by using operations.

Measurement of Production Activity Against Lean Performance Metrics

Use the Production Activity function to capture production data automatically through manufacturing center transactions. The data you capture through this process can then be analyzed as needed against any lean performance metrics you define.

Lean Metrics

Indicate lean metrics by period, day, week, resource group, even free form parameters such as seasonal. Use the Production Activity tracker to dynamically evaluate the production activity for each resource group against the lean performance metrics you have established for your manufacturing processes.

Support for Hybrid Approaches to Lean

Employ a phased approach to implementing lean practices for tracking material, MRP and Kanban in a mixed environment. By offering manufacturers the choice, at the part location level, how the part will be managed, manufacturers can more easily migrate to lean, while synchronizing MRP and Kanban execution.

Manufacturing Execution System

The Manufacturing Execution System is an easy-to-use, online system for the plant floor that allows plant-based transactions real-time visibility throughout the Epicor solution. This easy to use interface is developed for end users and offers options of deployment that include touchscreen monitors as well as bar coded enablement to simplify data entry while reducing mistakes.

Epicor MES provides accurate labor reporting, a vital concern in job costing and job status. Online transaction tracking gives management a current picture of what is occurring on the plant floor by employee and job.

Production Management

Integration with Epicor Job Management, Scheduling, Quality Assurance, and Advanced Material Management eliminates dual entry and provides online, real-time views of the latest plant floor scheduling priorities. In addition, integrated document management allows plant floor access to needed documentation including product drawings, process documents—even multimedia videos of difficult to explain processes.
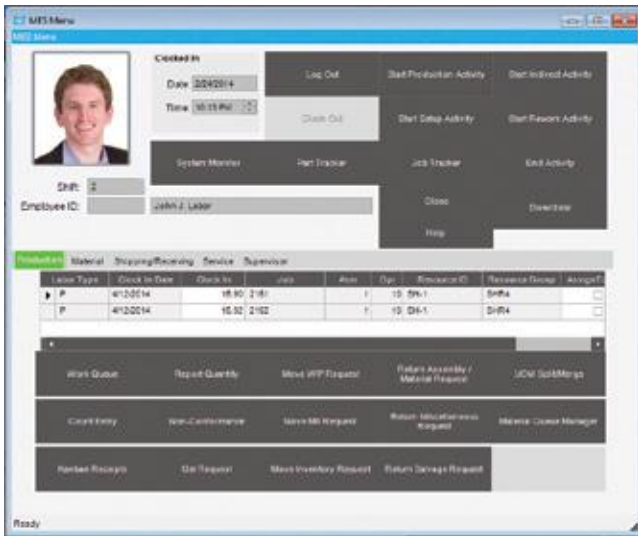
Automatically collect and report the status of jobs on the plant floor in real time.

Flexible Data Entry Technology
Use touchscreen, mouse, bar code, or keyboard interface to update labor information from the plant floor. Eliminate data entry mistakes and increase transaction speed by simply scanning a bar code tag to complete a transaction.

Document Management
Incorporate employee pictures, product and process documents, including product CAD/CAM drawings or even video instructions on how to perform a process.

Work Queue
Provide employees with prioritized work schedules and make information directly available to the plant floor. Optimized for use on the plant floor with the ability to select multiple operations for work at the same time, full sheet views, views specific to current, available, or expected work, ability to target work based on TAKT, pieces, hours, and setup group designations, and advanced search capabilities.

Multiple Languages
Display the Manufacturing Execution System screens in the employee's primary language.

Distributed Hours
Automatically split labor hours across multiple jobs being worked on simultaneously by an employee. Likewise, split resource or machine hours when two or more employees work on the same resource.

Quality Reporting
Capture rework and scrap reason codes, along with miscellaneous employee comments from the plant floor. Use the Quality Assurance options to report setup inspection, first article, piece counts, and more.

Shop Warnings
Shop warnings appear in various locations throughout the system when certain conditions exist or certain events occur. They are intended to keep supervisors informed of a job's status or an employee's performance.

Grace Periods/Multiple Shifts
Manage clock-in and clock-out periods with adjustments made for user-defined grace periods. Accommodate split and staggered shifts.

Trackers in the Plant
Users can access online trackers on the plant floor from within MES. From Job Tracker, Order Tracker, Customer Tracker, Shipment Tracker, and more are available based on login and secure access.

Shop Tracker
Access who's here, who's not here, current work center activity, as well as user-defined alert conditions from the plant floor.

Shipping and Receiving
In combination with Advanced Material Management, maximize responsiveness in the warehouse with Shipping and Receiving functions from within MES.

Inventory Management
In combination with Advanced Material Management, maximize responsiveness in the warehouse with Inventory functions such as adjustment, material issues, physical inventory counts from within MES.

Material Handling
In combination with Advanced Material Management, maximize responsiveness of material handlers with material move queues and give operators the ability to request in process WIP moves of product from one location to another, maximizing control of in process products while reducing delays. Additionally, move WIP products into inventory storage locations or stage WIP at the next resource based on available space and time. Quickly and accurately identify WIP and inventory containers with system generated bar codes.

Advanced MES

Epicor Mattec® Manufacturing System (MES) extends your Epicor system to provide automatic production monitoring and process monitoring, empowering manufacturers with production data and the ability to eliminate inaccurate and time-consuming manual data collection; so operators can stop measuring and monitoring, and focus on making quality products.

If you're ready to become more competitive with Lean and Six Sigma initiatives, advanced MES delivers the data, analysis and root-cause information automatically. You can achieve informed lights out manufacturing, and get the powerful metrics you need to improve performance—Overall Equipment Effectiveness (OEE), run rates, scrap, yield, energy consumption, material consumption, and much more. Accurate machine-related data, along with operator depth and dimension helps you pinpoint critical issues, reduce waste, and improve quality and customer service.

▶ Digital and analog machine signals directly from sensors or PLCs, or via OPC-compliant PLCs

▶ Role-based displays and dashboards for operations, plant, and management

Deploy Your Way
Epicor makes it easy to get there – advanced MES runs on current Microsoft Windows Server® with SQL Server. Epicor Advanced MES has the industry know how to connect to or get a signal from any kind of machine, no matter how timeworn or modern, and the system uses machine interface units (MIUs), open connectivity protocol (OPC), programmable logic control (PLC), and personal computer (PC) interfaces.

Usability
The advanced MES collects production data automatically—no more manual data collection to worry about. Operators use touch-screen technology to add depth and dimension to the automatic production data, so you get a clear picture of the what, why and when of downtime, cycle time, quality, and scrap. Operator help calls with automatic routing and notifications empower employees to respond quickly, improving productivity.

Plant Notification
The system also has real-time automated alerts, notifications, escalation and other communications, so the people who need to know are in the know when it matters the most—immediately, so they can take action to correct a problem, or improve performance on-the-spot. Automated alerts include machine conditions, cycle, process variations, efficiency, and scrap.

Office, Mobile, and Global
Take the power of Advanced MES with you on a Web-enabled mobile device or tablet with browser-based dashboards, information, and analysis. Plus, it doesn't matter if you have a single operation, or a distributed network of plants internationally, the system is currently available in more than 10 languages, and suitable for language customization.

Visibility, Reporting, and Analysis
From the "top floor to the shop floor", it's important to know the score, every minute of every shift, every day of the year. Epicor scoreboards and displays empower front-line professionals to take action and make improvements instantly. Maintenance, quality, and other operations stakeholders have facts in-hand to support recommendations, and management has what they need to understand tradeoffs from every angle.

▶ Plant floor viewer with real-time machine state and job monitoring

▶ Consistent, automated, OEE and other efficiency metrics

▶ Production metrics from machine to enterprise level

▶ Downtime and scrap analysis

▶ Operator labor and productivity

▶ Performance versus schedule, labor forecast, tool conflict, job and part history

Empower production managers with equipment driven analytics.

Schedule Optimization
Advanced MES helps the plant change instantly based on new requirements with a click-and-drag production schedule. Or, you can watch the schedule update and adjust automatically based on actual machine speeds, production counts, equipment status, conditions, or job specifications. The system makes it easy to plan by showing resource availability based on machine/part/tool compatibility, and optimal plans based on prior part performance. What-if analysis combines with built-in machine capacity planning and labor and material forecasting for better planning. Advanced MES supports Kanban scheduling.

Energy Monitoring

Tackle power consumption and the cost of energy with Energy Monitoring. Epicor helps you analyze load patterns, production requirements, and resource energy demands, giving you the power to reduce peak demand and capture energy savings. With Epicor, you can quickly and easily capture and analyze energy performance indicators (EPIs) to reduce consumption and cut costs.

▶ Monitor and analyze energy consumption by machine, job, shift, product

▶ Real-time scorecards

▶ Understand maintenance and quality in context of energy consumption

▶ Evaluate idle vs. shutdown-restart tradeoffs

▶ Analyze price accuracy with direct energy required to produce any item

▶ Monitor energy by asset, job leveling, and loading

Reduce operating energy cost with energy monitoring.

Quality Management

Epicor extends accountability to the machine performing the work, and give operators time to respond before an event affects quality and performance. And, Epicor makes the job even easier with easy-to-digest quality trend information, to engage your production team and help them become proactive.

▶ Automatic part qualification/rejection

▶ Part and machine process data for traceability purposes

▶ Statistical quality control (SQC) and statistical process control (SPC)

Machine Maintenance

Epicor pays close attention, making it easy to stay on track with maintenance schedules, equipment performance, energy consumption, and statistical quality. Preventive maintenance capabilities help operators stay on track too, with information they need to affect quality or performance.

▶ Machine and tool preventive maintenance (PM)

▶ Cycle or run hour PM

▶ Automated alarms and notices for PM

Enterprise Manufacturing Intelligence

Track, measure and analyze downtime and plant performance— instantly and over time—to eliminate random and chronic losses—on the front line, throughout the plant, and across the production network. Automated data collection direct from your machines is the gold standard in performance improvement, and Epicor exceeds that standard with analysis, reporting and planning to help you achieve your goals. You decide which metrics will help you have the greatest impact on availability, performance and quality, while Epicor helps you collect and understand the root causes of loss.

Monitor and Analyze Performance

Accurate data, instantly and on-the-fly, not minutes, hours, or shifts later, helps you find more capacity. When you make more without more assets, you improve profitability. Epicor Informance Enterprise Manufacturing Intelligence (EMI) collects data directly from equipment and operators on the shop floor in real time, eliminating inaccurate and time-consuming manual data collection. With information in your hands "right now" you can become proactive, so you anticipate and solve production problems immediately. You and the entire operations and production teams can work collaboratively to reduce downtime, and optimize equipment, capital, and worker resources, and drive performance gains.

▶ Over 1000 analysis choices available out-of-the-box

▶ One-click drill-down visual root-cause indicators

▶ Accurate, visual performance trend analysis

▶ Automated data collection to eliminate time-consuming, error-prone manual intervention

▶ Role-based metrics, displays and dashboards for operations, plant, and management

▶ Metrics in standard and financial context, based on product types, size, brand (and many others)

▶ Single plant and multi-site performance analysis

Production Management

Leverage Big Data in Manufacturing

It's all about the little details, and responding at the right time. Operators don't have time to gather, organize, and analyze enough data to respond to problems, so they react. They certainly don't have enough data points to become proactive. Epicor Informance EMI lets you create a closed-loop process to eliminate production loss--downtime that can be used for more capacity. We'll help you use big data collected directly from equipment to assess and prioritize problems, and even determine if losses are random or chronic, so you can push them through the right process.

Quality Assurance

Extending your solution with Quality Assurance helps to ensure that complete visibility of quality operations including visibility of items in the quality process. Accurate costing demands that products moved through quality accurately reflect their value and are removed from appropriate WIP. Additionally, this module includes processes for supplier returns with links to Accounts Payable for automated debit processing; closing the loop on traceability of products in and out of quality within the plant.

Tie together all quality functions, whether it's scrapping end parts, rejecting raw materials or tracking first article inspections. Inspectors have queues of items to inspect with full disposition and corrective action follow-up. Plant floor employees can flag parts as nonconformant, which moves them into an inspection queue. Parts that fail inspection may be flagged for review by a material review board.

Record and track quality data to fulfill customer requirements and promote continuous improvement.

Social Quality

Collaborating the right resources to improve quality often means redundant communication and events. Using social quality groups enables quality events to be resolved faster and long term quality improves as a result of this collaboration.

Quality no longer needs to be an isolated department, in collaboration with engineering, production, and sourcing, quality naturally improves. Cost of quality is also reduced dramatically.

Mobile Quality

Access to information at the point of checking and recording quality events reduces the inaccuracies and improves efficiency of quality professionals. Whether recording inspection results or responding with root cause analysis to a corrective action, information about quality that is inclusive and tied throughout the business improves overall business quality.

Inspection Workbench

Monitor WIP, review all inspections in priority and automatically take action on those requirements from the inspection workbench. Inspectors move passed parts back to jobs and failed parts into discrepant material report (DMR) processing, or they simply scrap them.

Nonconformant Records

Create a nonconformant record (NCR) for all nonconformant parts. From a job, shop floor employees automatically create an NCR when they scrap an end part or raw material. Inventory personnel create an NCR when they scrap parts from inventory.

Non-Netting Bins

Use non-nettable bins to keep parts undergoing inspection or on-hand quantities.

Discrepant Material Report Processing

After failing inspection, create a DMR to provide the MRB with an online queue of parts that need to be dispositioned.

Corrective Action

Create and track all preventive and corrective actions online. With due dates, audit sign-offs and unlimited comments, corrective actions provide for follow-up of quality issues.

Material Review Board

Disposition parts by an MRB after failing inspection. Online documentation provides an audit trail of MRB actions.

Cost of Quality

Generate cost of quality reports to identify how much quality problems are costing you, whether parts are scrapped from inventory, a job or receipt inspection.

Packing Slips

Print a customizable packing slip for all parts returned.

Debit Memos

Create a debit memo in DMR processing and it is automatically tied to accounts payable.

Audit Trails

View inventory transaction detail occurring in inspection and DMR processing with the material transaction detail report.

Certificate of Compliance

Businesses are increasingly requiring detailed compliance documentation. Depending upon the industry, this documentation is commonly referred to as Certificates of Analysis (COA), Certificates of Quality (COQ), or Certificates of Compliance. To help manage this documentation, Epicor includes the ability to check for Certificates of Compliance at receiving of materials from suppliers, receiving of in process parts from outside operation suppliers, and before shipping products to customers.

Enhanced Quality Assurance

Traceability and audit of quality data drives businesses to develop "systems", many times paper based, to support the collection and use of quality testing data. Enhanced Quality Assurance is designed to extend base Quality Assurance with support for the management of controlled test plans and the results for products, groups of products, processes, and other testing. It offers the ability to define testing elements or attributes as well as lists of attributes to test which can be used to measure against testing results for pass/fail decision criteria. It includes the data used for Statistical Process Control (SPC) and is easily accessed to build SPC analysis. In essence, Enhance Quality Assurance gathers the data and makes it available to help ensure that your next audit goes smoothly.

Enhanced Quality Assurance is a fully embedded component of the application and is configured to use serial and lot tracking for each sample, storing this data within the results database. Document management, a cornerstone function of the system is linked to inspections plans and individual specification lists and enables access to key documents during results collection. Finally, this module takes advantage of robust configuration tools to enable results entry forms to be configured to match unique business test plans layouts. Familiarity of layout of test plans and results entry ultimately reduces the training effort to bring the system online.

In addition to production and receiving inspections, when used in collaboration with Epicor Maintenance Management, calibration test plans are available for resources, equipment, and assets. This helps to help ensure not only the accuracy of quality data collected from these devices, but it can also be used to validate any equipment against business standards with auditable results.

For businesses looking to not only perform receiving inspections, but attach logic to the frequency of inspection, Enhanced Quality Assurance offers skip lot rules that define the frequency of inspection for each primary supplier at the part level.

Quality solutions today include not only tracking of quality events (such as inspections and non conformances) as they happen; they also include a proactive approach to quality by ensuring that the employees performing job functions are properly trained (ISO standards). Epicor Enhanced Quality includes a robust employee training feature set that supports the management of training courses and course schedules for certification programs and onsite/offsite events. Supporting your business objectives for cross training your workforce, employee training functions track employee attendance alongside performance and offer flexible employee training request features to enable employees to self request training or have training assigned to them.

Inspection Attributes

Define unique business inspection attributes or characteristics. Attributes can be numeric, character, date, check box, combo box, or comments.

Specification List

Sets of attributes define test plan inputs with additional criteria including minimum and maximum values expected as well as combo box choices and documents attachments. For optimum control, each specification list is revision controlled.

Inspection Plan

Build inspection plans that utilize specification lists for results collection and that inspect parts, operations or calibrations. inspection plans use embedded configuration capabilities to build input screens tailored to each unique test plan and lay out fields and data to match quality department expectations. Default documents can be tied to the inspection plan. For optimum control, each test plan is revision controlled.

Results Collection

Collect and store results data for each sample alongside appropriate job, part, inspection plan, serial number, lot number, purchase order data, and more. Results data can be used to produce compliance documentation and is available for audit purposes online through the Inspection Results Tracker.
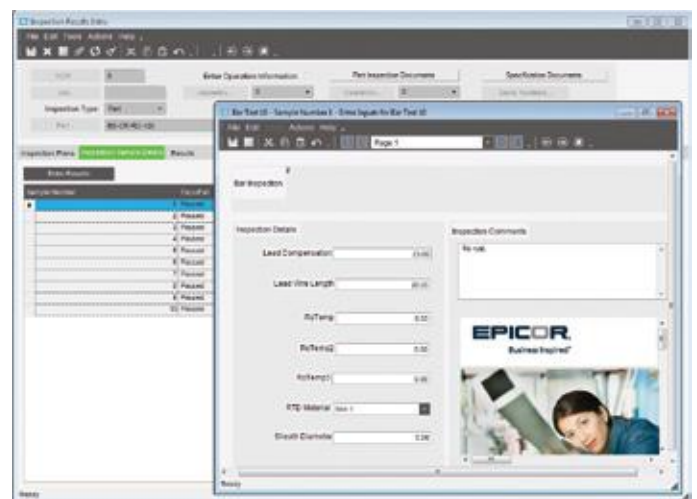
Track inspection results data online.

Statistical Process Control (SPC)

Use results data in an online database for each access and to build SPC analysis.

Production Management

Flexible Inspection Plan Configuration
In addition to the dynamic nature of the inspection plan (i.e. results entry form is dynamically built based on the tied specifications list), multiple inspection plan/specification lists sets can be tied to a part, operation, or equipment. This flexibility supports requirements for standardized test plans to sit alongside product or product group specific test plans with results entry and collection of data for both during inspection.

Return Material Authorization (RMA) Inspection
Inspect incoming returns and store results data with predefined Inspection Plan/Specification lists specific to the return of a specific part.

First Article Inspection
Make first article inspections and store results for audit ability and analysis.

In Process Inspection
Tie inspection plan/specification combinations to an operation to trigger results entry for the operation during collection of data on the plant floor.

Subcontracting Inspection
Perform receiving inspections on parts subcontracted to a specific supplier. Track results and generate supplier performance metrics with data from sample results.

Manufacturing Execution Systems Enabled
Perform plant floor inspections through Manufacturing Execution Systems (MES) terminals, simplifying effort to bring inspection processing online in the plant. Inspection Data function available via end activity, report quantity, and inspection processing features.

Serial and Lot Traceability
Record the serial and lot number for each sample during inspection results entry for reporting and audit purposes.

Inspection Collect Results Location
Inspect data from within Labor Entry, MES End Activity, MES Report Quantity, RMA Disposition, and Inspection Processing.

Inspection Data Tracker
The Inspection Data Tracker offers an online query of results data for each sample tested along with appropriate job, operation, part, purchase order record that is contextually related to the inspection event.

Skip Lot Cycle Definitions
Optionally categorize and setup cycles for receiving inspection with skip lot logic that follows optimum frequency of inspections for suppliers. Whether inspecting all lots or inspecting one and skipping the next ten lots, skip lot helps to ensure that quality control manages the frequency of inspection.

Resource Calibration Test Plans
Used in conjunction with Epicor Maintenance Management, Enhanced Quality Assurance offers the ability to predefine inspection plans for resource (gauge) calibrations along with managing the last calibration date. This can be done for Resources, Maintenance Management Equipment, or Asset Management.

Training Course Management
Manage employee training events for both onsite and offsite training, including management of training costs. Assign instructors and set schedules for courses.

Employee Skills Management
Set up training courses and manage attendees with attendee performance measures. Online review through a Training Course Tracker of employee training for "proof" of skill maintenance and/or appropriate training to work performed.

Employee Course Request
Employees can be assigned appropriate courses to attend or can request training themselves.

Quality Analysis and Real-Time Response to Quality Data
Epicor offers a suite of tools for use of quality data. Whether responding to a bad test result immediately with Business Process Management (alerting a quality manager about a critical result), performing trends analysis or responding to an auditor request with data pulled from a Business Activity Query or reviewing supplier overall performance with Enterprise Performance Management analysis cubes and dashboards, the data you need is available with a robust toolset to support your unique business requirements.

Advanced Quality Management Web

Epicor Advanced Quality Management (AQM) provides the foundation for significant productivity improvements and cost reductions across your entire enterprise. This web-based solution provides a complete framework for compliance with regulatory and industry standards, including ISO, automotive (TS), aerospace (AS), and FDA (21CFR 11) requirements.

Advanced Quality Management Complete System – Web

The Complete System includes these modules:

- AQM Product Management - Web
- AQM Non-Conformance - Web
- AQM Corrective Action - Web
- AQM Customer - Web
- AQM Supplier - Web
- AQM Document Management - Web
- AQM Audit Management - Web
- AQM Device Management - Web
- AQM Equipment Management - Web
- AQM Data Collection & SPC - Web
- AQM Advanced Planning - Web
- AQM Employee Training & Skills Management - Web

AQM Product Management – Web

Manage part ID's, blueprints and specifications, product/part ID's, characteristics, inspection plans, process flows, DFMEA's, PFMEA's, control plans, change control and approvals, audits and task assignments, single-level BOM's.

AQM Non-Conformance – Web

Manage non-conformances and dispositions, traceability, verifications, deviations and approvals for non-conformances across the business.

AQM Corrective Action – Web

Manage corrective actions across the business. Manage internal, supplier and customer corrective action requests. Assign teams, products, tasks, NCM's and approvals.

AQM Customer – Web

Manage customer communications, customer communication recording/tracking, contacts, task assignments, communication types, and escalations to NCM management.

AQM Supplier – Web

Manage supplier communications and audits, supplier communication recording/tracking, contacts, task assignments, communication types, and escalations to NCM management. Supplier performance tracking and scorecards are included.

AQM Document Management – Web

Manage work instructions, procedures and any revision controlled document. Document Management capabilities include change control and approvals, audits, printed document check-in/check-out, and integration with AQM Employee Training & Skills Management.

AQM Audit Management – Web

Manage internal system audits, define audits and schedules, define templates, create checklists/questions, record results and document findings, and create non-conformances and/or corrective actions.

AQM Device Management – Web

Manage calibrations and analysis studies, device ID's, calibration characteristics, procedures and schedules calculated by days/usage. Device Management includes device location, AIAG MSA studies and device check-in/check-out. Links to AQM Equipment Management.

AQM Equipment Management – Web

Manage preventive and reactive work orders, equipment ID's, preventive maintenance schedules, procedures, preventive maintenance activities, spare parts, and machine usage. Links to AQM Device Management.

AQM Data Collection and SPC – Web

Manage receiving, first article, in-process and final inspection, inspection plans, characteristic control information, data collection, change control, skip lot processing and Statistical Process Control (SPC) charting.

AQM Advanced Planning – Web

Manage new product launch and customer part submittals, create plans, set up templates and checklists, prepare customer submissions, create attachments for proof records, and define approvals.

AQM Employee Training & Skills Management – Web

Manage training, skills and jobs, employee communications, internal projects, training matrices, job descriptions and skills management, change control, and Quiz.

AQM Restricted Data Collection Users – Web

Data Collection Users are limited-use licenses solely for collection of plant floor data, issuing non-conformances, and accessing inspection plans.

AQM Supplier Portal

The Supplier Portal offers a web-based quality performance and communication tool for your suppliers which integrates seamlessly with the data collected within the AQM system. This secure and flexible tool allows for tailored access to internal data as it rests on top of the system resulting in rapid deployment of information.

Supply Chain Management

Linking the trading partners, processes, and systems that make up your supply chain has become the differentiation you need to achieve industry-leading performance. Removing processes that do not add value and synchronizing processes within and outside a company enable you to meet customer demands for lower cost and faster delivery. Epicor provides the most effective coordination from initial raw materials to the ultimate consumption of the finished product by providing the visibility you need throughout your value chain.

Epicor offers you a full range of Supply Chain Management (SCM) capabilities, built within a single business platform, based on industry leading service-oriented architecture (SOA). Epicor SCM is a full suite of enterprise application capabilities including purchase management, sourcing and procurement, inventory management, advanced material management, and warehouse management, and is complemented by order and demand management capabilities of Epicor Sales Management. Combined, you have the solution needed to satisfy customers and customer demand in today's increasingly global market place.

Purchase Management

Purchase Management handles purchase order writing and the tracking of supplier performance. Detailed line items indicate planned receipts to inventory or a job, although their destination may be changed at the time of actual receipt entry. Purchase order receipt processing updates suggested supplier and detailed purchase history files, which provides continual reference to aid in making purchasing decisions. With Purchase Management, you can reduce inventory levels, improve on-time deliveries, enhance your cash flow, and increase your profit levels.
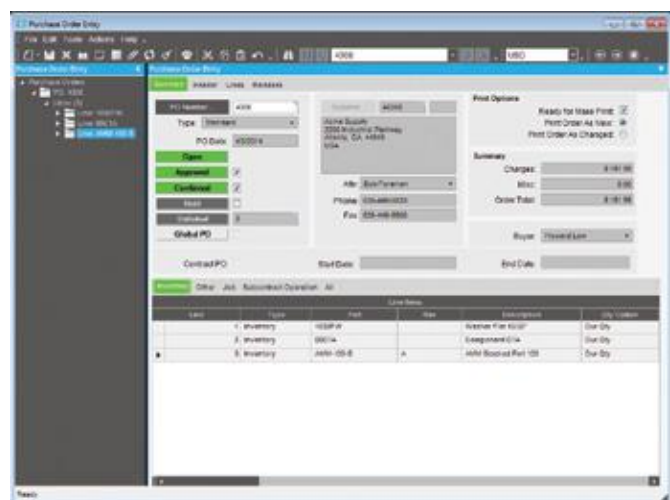
Enter, approve, and confirm purchase orders with multiple line items and releases.

Approved Suppliers
Approve suppliers before anything can be ordered from them. To accommodate customers that insist upon using specific suppliers, Epicor allows you to define those relationships, and prevents ordering from the wrong supplier for those jobs.

Automated Purchasing Tools
Automate part suggestions, quantities, and suppliers to buy from in order to meet material requirements and on-time delivery schedules. Optionally create new POs automatically.

Cross-Referencing
When a supplier's part number differs from the stocking part number, link the cross-reference in the suggested supplier file for printing on purchase orders.

Mass Purchase Order Receipt
Quickly create receipt details for all lines, all releases for a specific line, or individual lines and releases.

Multiple Location Receipts
Receive individual lines or line releases to different locations for multi-site organizations with centralized buyers.

Part Master Price Breaks
Create price breaks, including effectivity date per inventory part or supplier.

Purchase Requisition
Request purchases from anywhere in the plant. A formal requisition system tracks the status of the requisition, from initial request to final approval and actual purchase order. The requestor is notified each step of the way.

Advanced Requisition Management

Every well-balanced supply chain maintains a budget and control over items requisitioned for each stocking location. Epicor Advanced Requisition Management (ARM) enables organizations to gain visibility and control of procurement spending by providing an online workflow and purchase requisition tool. It gains information on their spending which supports negotiation of bulk purchase discounts from suppliers, assigns preferred suppliers for particular products, sets the right spend limits for individuals and assigns the chain of authority for approving purchase orders. Epicor ARM is fully automated and improves communication and efficiency across the supply chain.

Purchase History

Access detailed information on purchase orders and receipts over extended periods of time from purchase history.

Purchase Order Printing

Print purchase orders directly from PO entry by date, user or purchase order number range. Purchase orders also may be faxed directly from your computer to your supplier.

Purchase Order Tracker

Immediately access all purchase order information via screen inquiry, with multiple search capabilities.

Supplier Tracker

Quickly display information about any supplier, including open and historical purchasing transactions.

Supplier Connect

It's not just your customers who can use Epicor Commerce Connect, your suppliers can too. By providing the means for self service on a whole range of inquiries (such as open orders, part information and access to old invoices), Epicor Commerce Connect eliminates the need for inquiries to come in via either e-mail, phone or fax–significantly reducing the amount of time staff need to spend on answering them.

Supplier Connect also allows for suppliers to update their information via their own supplier portal, answer requests for information and confirm changes to purchasing orders. It also provides for delivering metrics on performance. This not only provides for a more seamless relationship between you and your suppliers, it allows for your business to react much more quickly and accurately to any change of circumstances with supply.

Purchase Contracts

Epicor Purchase Contracts is useful for purchasing inventory items on a recurring basis. You can establish delivery schedules that are regularly re-issued, against which recurring deliveries are made.

The advantage of this functionality is ease and accuracy. For example, if you need a quantity of Part ABC to be purchased monthly, you need not enter a discrete purchase order each month. Rather, you can set up a contract PO schedule and maintain this record.

Contract line items can be assigned to purchase orders. These line items automate delivery schedules, with delivery dates, prices, and corresponding quantities.

Requirements determined by Generate PO Suggestions are calculated and realized into delivery schedules. The schedules can be adjusted manually in order to conform to supplier requirements, inventory control, production efficiency, and business expediency.

Part Schedule

Use Part Schedule Maintenance to establish the combination of part, plant, and calendar that makes up the part schedule. This program is useful for assigning a period of frequency and minimum quantity for a part schedule.

Periodicity Code

Use Periodicity Code Maintenance to establish the rules and terms under which orders periodically arrive from suppliers.

Distribution Requirements Planning

Today's businesses are looking for every opportunity to reduce inventory carrying costs while still striving to maintain high service levels—by having the right quantities where and when items are demanded by customers. Beyond streamlining business processes to drive new efficiencies, businesses are using improved analytics to provide a higher level of visibility and greater control of inventory. Through careful supply chain orchestration, best-in-class organizations are able to lower costs while optimizing inventory. Distribution Requirements Planning (DRP) capability is a key enabler of success for any business that resells items sourced through channels with long or variable lead times.

Pack Light Inventory Management for Epicor includes a suite of capabilities designed to work in tandem with your Epicor ERP data for optimum efficiency. It goes well beyond the capabilities of typical forecasting software and provides applications that assist with economic decision making, long term replenishment planning, and purchase order execution. Therefore, buyers become more productive while increasing fiscal stewardship. Additional productivity is gained through supplier performance tracking and alerts that allow for management by exception.

Demand Manager

Demand Manager delivers the tools you need to make better stocking decisions. Integrated demand forecasting and inventory planning software helps you effectively manage on-hand inventory levels with advanced statistical forecasting that provides the ability to collaborate, consolidate, aggregate forecasts, and adjust according to planned events. Demand Manager leads to less inventory on the shelf, higher fill rates, and better customer service. It is visually based and easy to use so you don't waste time searching through tables.

Supply Chain Management

Requirements Planner

Requirements Planner is an active Purchase Order planner that suggests replenishment quantities by product at the warehouse level. It provides inventory requirements planning beyond 12 months in advance that accounts for carrying costs, freight incentives, order discounts, and required ordering quantities when planning and executing transfer or purchase orders and can be further optimized for days' coverage, shipping container size and more.

Supply Base Manager

Supply Base Manager monitors supplier's lead-time and delivery performance. A supplier's performance history can be viewed and exported by detailed receipt and graph (PARETO) by: item, stocking location and in summary. "Planned" and "Expected" lead times are calculated by item and supplier for planning purchase orders. Furthermore, supply assurance can be increased by incorporating "safety time" into purchasing lead times and safety stock. Additional supplier performance monitoring serves as a tactical tool for ensuring that the business' supply needs are met through the tracking and reporting of supplier delivery performance. The Supply Base Manager automatically buffers lead times used for replenishment planning.

Economic Order Manager

Economic Order Manager is a decision support tool for management and purchasing agents that performs inventory simulation, including ABC analysis, customer service level assignments and performance monitoring. Automated economic order management capabilities provide computational efficiency while allowing the user to adjust the variables that determine business-appropriate inventory levels and service levels.

Exception Signals

Exception Signals offers customizable alerts when statistically significant variations from the plan occur, helping you manage by exception. Exception Signals monitors exceptions and captures messages from each of the modules and presents them to buyers and planners in a prioritized order. Customizable alerts allow the user to be proactive in avoiding potential service failures by identifying when sales, supplier delivery performance, forecasts, or lead times deviate from plan.

Supplier Relationship Management

Supplier Relationship Management (SRM) provides tools for buyers, procurement staff and purchasing agents, or those providing quotes, to request quotes for raw materials or subcontract services from one or multiple suppliers. RFQs are generated with one or more lines, each line having the ability to request pricing from one or more suppliers.

Supplier RFQ responses automatically build or add to existing part price-break tables, with current effectivity dates to be used in other Epicor applications.

Buyer's Workbench
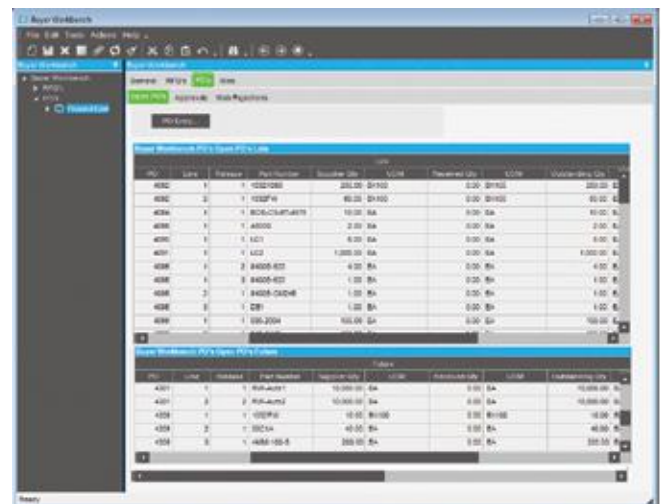
Manage all associated purchasing transactions including request for quote, order expediting, purchase order management, and supplier account management, as well as drill down to all associated information.

Part Price-Break Tables

Supplier RFQ responses automatically build part price-break tables for use with other applications.

RFQ Decision Wizard

Filter and sort RFQ criteria based on your specific needs to find the best match for the needed materials. Sort criteria include lead-time, price, quality rating, ISO certification, and on-hand inventory.

Evaluate vendors based on historical performance from the buyer's workbench.

Inventory Management

Inventory Management provides the key functions necessary to update and maintain raw materials, WIP, and finished goods inventory quantities and costs. MRP creates inventory allocations for jobs entered through Job Management or generated from Order Management. These allocations are relieved as inventory items are issued to the job, or as purchase order receipts are posted.

Issued inventory reduces quantities on hand, which are continually replenished through the processing of purchased or manufactured item receipts into inventory. Receipt processing provides a continual update of inventory average, FIFO, lot or last costs for every item. A variety of screen inquiries provide management analysis of MRP, shortage monitoring, reorder analysis, stock status, valuation, and critical items.

Alternate Parts

Setup in part maintenance as alternate parts you have the ability to define these alternates as either complimentary or as substitutes and these are made available in the various order entry processes. Complimentary indicates other items that "go with" the part being ordered as a suggestion of other items they might consider. With substitutes (where you don't have stock of the requested part) there are three types; Comparable, Downgrade or Upgrade and as the naming indicates these are alternatives which may be similar or slightly less or more appropriate.

Costing

Maintain FIFO, Average, Lot, Last, and Standard costs for each individual part master. The application retains transactional cost and quantity granularity; therefore the oldest cost can be determined for the cost of sales.

Cost Tracking

Separately track material cost, material burden, subcontracting, labor, and burden costing.

Country of Origin

Country of Origin offers the ability to track the country of origin at a part level, to define and then report on the composition, by percent, the specific countries of origin for that part. Composition is made available to EDI, manifest, packing slips, and label print.

Cycle Counting and Physical Inventory

Management and control of inventory is critical. Furthermore, in some regions such as Europe, the control and counting of inventory on a regular and scheduled basis helps significantly reduce annual audit costs. The cycle counting module contains the breadth of functionality and features needed for users to provide:

- Detailed audit control over the selection of items to be counted

- The frequency over the number of times these items are counted

- The tracking, recording, and review of variances for the items counted

The system will allow for the definition of the number of cycles required, counting of zero quantity on-hand, etc., and the assignment/designation of the items with an appropriate ABC code. In addition, Physical Count processes allows control over Slow Moving, Obsolete and Excess Inventory.

Global Trade Standards

For companies that are required to work within global trade frameworks, Epicor SCM helps to ensure that you can meet the many international standards. At a part level the user can define the global trade standards for the part (UPC UCC-12, EAN UCC-13, EAN UCC-8, GTIN-14 etc). When codes are assigned to a part, a global trade standard bar code can be scanned at any

Control inventory and significantly reduce annual audit costs.

part number field which automatically relates the transaction to the correct inventory part.

Lot Tracking and Lot Attributes

Provides visibility of parts by lot throughout the system. Record material received by lot, keep traceable material on-hand by lot, and maintain detailed usage information by lot at every level of the process. In support of more detailed and complete lot tracking needs Epicor has provided the ability to allow additional lot attributes to be stored for each part lot and the option to allow the system to generate lot numbers based on part specific rules. Examples of the additional Lot attributes include: Batch, Manufacture Lot, Heat Number, Manufacture Date, Expiration Date, Firmware Version, Cure Date, Best Before Date, etc.

Manufacturers Part Cross Reference

Epicor can hold cross references for a manufacturer's part, so that receiving/inspection can confirm that the part they received is one of the correctly identified parts for the qualified part manufacturer.

Online Part Tracker

View parts, purchase orders, sales orders, quotes, and jobs to analyze current requirements and track pending receipts.

Part Cross Referencing

This functionality allows the user to create any number of cross-reference codes to a single inventory part. These cross-reference codes could be a Customer's Part Number, Supplier's Part Number, Manufacturer's Part Number, or just a simple internal shortcut. When the cross-reference is for a serial tracked part, then for each cross-reference created, a serial number format can be defined which will then be used when serial numbers are created using the cross-reference item number.

Part Master Price Breaks

Set up price breaks, including effectivity date, per inventory part/supplier.

Supply Chain Management

Physical and Perpetual Inventory
Enter physical counts, print gain/loss reports and update on-hand inventory levels.

RoHS
Restrictions on use of certain Hazardous Substances (RoHS) EU directive instructs companies that sell electronic equipment in the European Union to reduce (under published threshold values) 6 Hazardous Substances from certain types of electronic equipment. The main aim of the RoHS directive is to prevent hazardous materials entering waste landfill sites. Other legislative bodies in other regions outside the EU have similar restrictions or are planning to implement a similar system including China, Japan, and California. Epicor delivers the ability for parts to have a compliance status in accordance with various legislative requirements and to track the consumption and disposal of those targeted parts.

Serial Tracking
Serial Tracking helps to ensure product traceability, allowing for greater control over how the user wishes to control serial tracked parts within the facility. These options range from no serial tracking through to full serial traceability when each move of a part is recorded, and a record is maintained of the lower level serial tracked components that were used in the manufacture of part. A further option with serial tracking is the ability to record serial numbers at the outbound stage only. This option is aimed specifically for supply chain users that need to record what serial numbers have been shipped to which customers and when, but they do not want the overhead of having to record the serial numbers as the inventory moves around the warehouse or between the manufacturing plant and distribution warehouse where the products are produced in-house.

Serial Documentation
Print serial numbers on all outgoing communication with the customer such as the packing slip and invoice.

Serial Number Tracker
Serial Number Tracker provides an online view into the movement of the product after the serial number was assigned.

Serial Number Assignment to Parts
Assign serial numbers to finished parts and raw materials processed throughout the system.

Serial Number Formatting
Format serial numbers as either numeric or alphanumeric and assign the number of characters for the field as well as a prefix.

Voided Serial
Allows for the voiding of serial numbers to help ensure they are no longer available in the assignment/selection browser

Time-Phased Material Inquiry/Report
Provide analysis within a user-defined time period on those parts where projected requirements exceed available quantities.

Unit of Measure
Base level UOM definitions with UOM Classes and conversions are just a few of the features found in Epicor as well as the ability to allow the user to select the unit of measure in which they wish to hold their inventory. When a part is defined to be tracked in multiple UOMs, then the user will have visibility of how many items they have in the different units of measure. A distributor can stock items, for example, as each, in boxes of 10, in cases of 20 or in pallets of 40 boxes. A user will be able to see exactly how many of each UOM they have in inventory and where they are located. This feature is also invaluable to businesses that use raw materials that they purchase in different sizes (i.e., 6x3 sheets or 8x4 sheets, etc.).

Advanced Material Management

Advanced Material Management (AMM) enables businesses to produce electronic requests for materials, dispatch those materials, and track inventory movements of all inventory including raw materials and work in process. Using wireless terminals and bar coding technology you are able to track inventory in real-time with complete control and visibility of raw materials and work in process as it travels throughout the enterprise.

Bar Coding on Demand
Print tags on demand enabling employees to properly label containers or to create custom labels (via Seagull Scientific, Inc. BarTender®) to meet customer requirements.

Handheld
Allows for the transaction of work either on a graphical touch screen station or via mobile Radio Frequency (RF) enabled device.

Material Handler Interface
Use an online queue of raw material and WIP parts to manage requests to locate and deliver the right parts to the correct resource at the appropriate time.

Material Movement
Different movement transactions are available for you to move a job to stock, move stocked material, or perform different returns to a job or stock.

Prioritizing Orders
Lets you treat your best customers with the highest priority by automatically allocating inventory to the highest priority orders first. Reserve or allocate materials from stock or directly from a linked job to make certain that you help to ensure your highest priority customers the greatest care.

Reserving Inventory
Reserve specific parts in inventory for designated orders.

Sales Order Allocation
Manage sales order allocations with greater efficiency and create more effective picking and shipping.

Scanning
Eliminate data entry mistakes and increase transaction speed by simply scanning a bar code tag to complete an entire transaction.

Shipping and Receiving

Shipping and Receiving provides a central application within Epicor to monitor incoming and outgoing items, whether they are shipments against an order, subcontract parts being sent to a supplier, raw material being received from a purchase order to a job or into inventory, or filling an order from stock. All activity relating to shipments and receipts can be performed and tracked. Online transaction processing promotes efficiency and ease of use, while online editing promotes accuracy. With Shipping/Receiving, a consistent interface processes all shipments and receipts in an efficient, accurate and cost-effective manner.

Auto-Invoice
Optionally create an invoice in Accounts Receivable following shipment to a customer.

Bill of Lading
Print customizable bill of lading forms for your shipments.

Mass Ship
Optionally mass release shipping lines from orders with same ship-to addresses.

Subcontract Parts
Track shipments and receipts of subcontract items online.

Receipt Tracker
Track receipts for goods that you have received.

Miscellaneous Shipment Tracker
View information about miscellaneous shipments.

Miscellaneous Receipts
Enter online any miscellaneous receipts to a job or into inventory.

Container Tracking
Container Tracking provides the ability to track container shipments as well as update the status and due dates of all purchase orders along the way.

▶ Container Shipment - When a container is shipped from the supplier, a notification is received with the actual shipment date, the estimated arrival date, as well as the volume specification of the shipped goods. Based on this information the related purchase order releases can be updated with new due dates and quantities.

▶ Container Receipt - When a container is received, a PO receipt is automatically generated based on the information of the container entered at shipment. With the volume information the expected transport cost can be calculated, which can be used to populate the landed cost information.

▶ Container Class - A container class defines the characteristics of common containers including volume and default cost information.

Customer Shipment Tracker
Track shipments that have been sent to customers.

Landed Cost
Allows businesses to track those costs accurately against the parts to which they apply, ensuring that the selling or assembly price then reflects the true cost of the materials, parts or finished goods. The cost of freight, insurance and import duties can have a big impact on margins, so landed cost processing offers significant benefits for those customers who import materials on a regular basis.

This functionality includes: uplift percentage of cost you put above your costs, duties, defines tariff rates in Import tariff table (rate, percent, fixed amount, min/max), indirect cost, split container shipments (some containers are delayed), and transfer indirect costs from one shipment to another.

Manifesting and Freight Management
Provides the freight cost calculations and compliant package labeling for the majority of commercial carriers such as UPS™, FedEx®, DHL, USPS® as well as Less-Than-Truckload (LTL) and ad hoc carriers.

Pack and Ship/Pack Out Processing
The Pack Out functionality adds greater flexibility and control to the shipping process by allowing carton level packing and grouping. Carton specific details such as carton weight and exact carton contents are captured with interfaces to allow manifesting (UPS, FedEx, etc.). The Pack Out screen allows for more of a "grocery store" packing system which requires very little mouse usage for distribution customers who require a very fast and accurate system of tracking carton contents.

Pack IDs
Pack IDs could be a single package, carton, or the contents for an order. Pack IDs could also be pack records for the contents of multiple orders. Allows the printing of pack records to fill orders to customers or ship parts to subcontractors with general or detailed line comments. And Master Packs can hold more than one Pack ID.
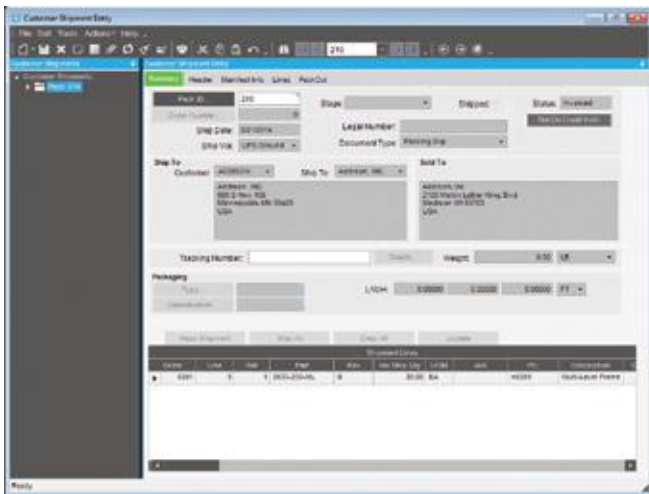
Customer Shipment Entry is a robust tool for managing the shipping process.

Master Pack

Master pack gives you the ability to track the precise contents of each individual pack ID. It provides the option of one carrier label for the entire master pack or a carrier label for each pack ID. This is useful for when users want to assign a Master Pack ID to a pallet of packages, so they can better track those individual packages on a single pallet that is going to the same customer or same ship-to address. The concept of a master pack is important for international shipments as it greatly reduces the complexity in shipping product over international borders.

Phantom Pack

Phantom Pack provides the ability to ship all items on an order under a single Pack ID. You determine the number of cartons needed, manifest the cartons with the tracking numbers, size and weight and freighted costs, and then generate the required shipping labels.

Label Forms

Epicor leverages Seagull Scientific, Inc. BarTender software to enable you to create your label or form format in a WYSIWYG interface. These formats are placed in a directory that is available to Epicor. Labels and Forms consist of fixed data or database variable data and can be human readable or barcode format or both.

Auto-Print Integration

This functionality provides for automatically printing barcode labels upon the completion of defined transactions in the Business Activity Manager program.

▶ Label Design: Integrated label and form printing.

▶ Label Printing: Integrated label and form printing.

Shipping Labels

Optionally print customized shipping labels for each order. Labels include the customer's name and address. They can also include the purchase order number, sales order number, and ship via, number of packages, shipping comment and weight fields.

Shipping Performance

Generate executive summary of company trends regarding delivery performance, including number of shipments made, percentage of on-time delivery, and average daily variance between customer promise and delivery.

Warehouse Management

Management of the supply chain requires robust logistics capabilities as part of the overall system. Epicor's Warehouse Management System (WMS) leverages Epicor, mobile ID data collection, and wireless communications to seamlessly link your warehouse with your order processing and manufacturing operations to optimize your pick, pack, ship, and receiving processes. With Epicor, your warehouse becomes a key part of the supply chain.

Bin Tracking

Enables the tracking of bins based on various attributes (size, location, whether the bin requires a forklifts to access, etc.).

Bin Wizard

Enables the quick creation of large batches of bins—all at the same time.

Warehouse Teams

Create teams of employees with attributes assigned to them such as warehouse, bins, bin zones and items, to enable better resource scheduling.

Customer Managed Inventory

Gives you visibility into inventory owned by your customer and allows you to assign that inventory to a job or sales order for that customer or that customer's customer. In both cases the values of these inventory items never appear in your ledgers.

Supplier Managed Inventory

Gives you visibility into inventory owned by your supplier in your warehouse. However, the inventory does not appear in your ledger until you consume those items, either in production or by receiving them to your warehouse.

Fulfillment Workbench

Use the Fulfillment Workbench for allocation or reservation and distribution processing, and plan for sales, transfers and job order types. Various fulfillment techniques, such as pick and pack, console-driven, and pre-pack processes may be performed through the use of templates to automate the fulfillment process for each. Hard allocation to finite level, versus reservations processing, may be launched directly from the order, line, and release areas as well. This feature also includes cross-docking capability.
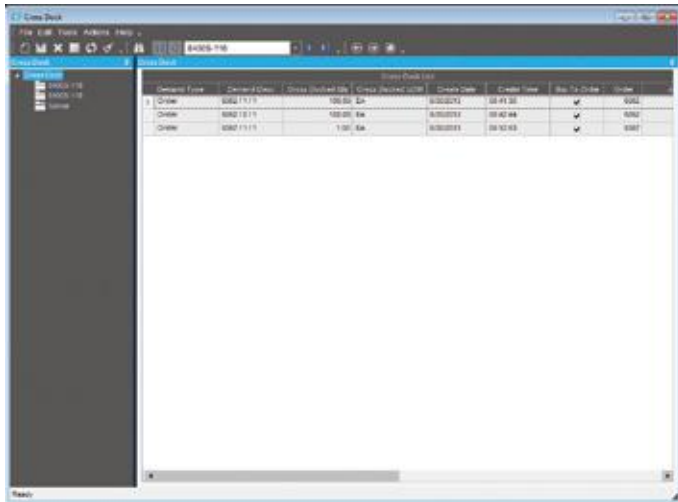
Supply Chain Management

Allocation Templates
Automates the allocation of inventory for picking, with pre-defined criteria such as bin, zone, lot, serial number.

Wave Picking
Provides the ability to group orders by warehouse area or zone, allowing the fulfillment worker to pick items in one fell swoop for multiple orders. This reduces the number of times a fulfillment worker must return to the same area to pick items.

View all cross dock orders waiting to be fulfilled by incoming receipts.

Cross Dock Tracker
Ability to view all cross dock orders waiting to be fulfilled by incoming receipts.

Paperless Picking
Use the handheld to automatically pick orders.

Queue Handling
Ability to put transactions on hold and enable cross docking of sales orders, jobs and transfers. You can also assign users or team resource groups, assign the priority in which transactions should be executed, and assign the pack station.

Queue Manager
Ability to put transactions on hold and enable cross docking of sales orders, jobs and transfers. You can also release transactions, assign users or teams to transactions, and alter the priority of transactions.

Queue Tracker
Use the Queue Tracker to view the status of Put, Pick, and Pack transaction types, and set the data to automatically refresh. Managers can view warehouse floor activity without having to filter on the various queue transaction types, which have unique identifiers. Warehouses and Bins use attributes to identify what specific transactions need special equipment, and the Queue Tracker assigns only those resources or groups with the ability to operate the specialized machinery.

Handheld

Whether doing physical inventory, material moves, or looking up serialized part information, the Epicor Handheld application offers an easy to use interface that is designed for plant and distribution employees.

Offering, comprehensive inventory visibility and control, the Epicor Handheld module allows you to track your inventory as it moves throughout your enterprise. Through the use of barcode scanning using stationary, portable, wired or wireless (radio frequency) equipment, users can quickly complete inventory transactions as they happen on the floor. Real-time data capture eliminates the need for data entry as a second step which will aide in improving inventory accuracy and speeding up the order-to-ship cycle.

Epicor Handheld transactions provide your users with event-based directing and routing of all managed tasks in real-time. Additionally, you can maintain complete transaction event history for analysis and reporting purposes.

Flexible to deploy, Epicor handheld technology uses industry standard Microsoft Terminal Services for handheld devices to enable virtually any device to be used. Just like any screen in Epicor, it is highly customizable so users can change workflow, add or remove options, and even resize a bit if their devices don't fit the 240x320 screen size requirements.

Supply Chain Management

Including support for Advanced Material Management transactions, Epicor Handheld better manages material handling capabilities by putting the update and review functionality in the hand of the material handler or forklift operator. Coupled with Handheld transactions for real time processing, Advanced Material Management offers detailed tracking of material requirements and work in process information through mobile access to the material and picked orders queue.

Eliminating manual entry of data, Epicor supports auto print control functionality which handles the automatic printing of forms and barcode labels upon the completion of a pre-determined list of Epicor transactions. Auto print control lets you define the events that trigger the printing, rules that define the conditions, and the action to take on a form-by-form basis.

Epicor is an Honors Partner and reseller of Intermec Technologies Corporation and the Epicor handheld transactions are tested on Intermec equipment. This does not preclude you from using other vendor's equipment. If you choose to use another hardware vendor you must adhere to the above requirements.

Epicor is a Software Partner of Seagull Scientific, Inc. and the Epicor Handheld solution is compatible with their Seagull Scientific, Inc. BarTender labeling technology.

Advanced Supply Chain: Auto Putaway Bin

For those companies that have a stock environment using warehouse zones and a sized bin racking setup, Auto Putaway Bin allows for the next available bin of the correct size to be automatically suggested when performing inventory transfers between locations. It accommodates a bin size and zone to be defined as valid "put away" areas for each part. The next open bin from the defined areas is automatically populated as the recommended locations to transfer the stock to when performing inventory transfers. The system also can define "floor" bin locations as default overflow locations if there are not any bin locations currently available. This module expedites finding available bins without warehouse workers having to physically walk the zones searching for space to accommodate the inventory.

See improved inventory accuracy with wireless device management of inventory functions such as on the fly adjustments.

Financial Management

Epicor Financial Management offers a refreshing new approach to business, a suite of accounting applications built for the highly regulated and increasingly global business world. Built around a series of "global engines" that support effective financial management and control anywhere.

Our goal is to help every business achieve sound financial management and control, from a single general ledger to the extended global enterprise, efficiently. Epicor Financial Management gives you access to real–time fiscal information and provides the modern platform you need to support business around the world.

Global Engines

Epicor Financial Management is built around a series of unique global engines, which in turn support the global nature of business today, enabling effective operations in existing and new markets as necessary. As your business is extended through a combination of organic growth and mergers and acquisitions, it can become challenged by complex and demanding global financial and regulatory burdens—demands that you must adapt to instantaneously. At the heart of the Epicor solution, Epicor global engines are designed to add accounting agility and flexibility to your business while simultaneously allowing you to meet the local financial and legal compliance requirements of individual markets.

Posting Engine
The rules-based global posting engine is central to the way Epicor applications work, and in particular, how Epicor Financial Management handles system transactions. Powerful enough to support the most complex global enterprise, with a need to configure comprehensive rules for how transactions from sub-ledgers are managed and posted to the general ledger, yet easy enough to support straightforward or out-of-the-box standards for smaller businesses.

Tax Engine
The highly configurable global tax engine allows businesses to define comprehensive tax rules and calculations in order to meet the needs of unique tax requirements and jurisdictions internationally, and then update them as often as needed.

Legal Numbering Engine
Epicor Financial Management contains a global legal numbering engine to manage legal numbering of all the printed transactions that a company sends to customers and suppliers.

Specific transactions that the legal numbering engine affects are:

▶ Sales Orders
▶ Purchase Orders
▶ Promissory Notes
▶ AR Invoices
▶ Credit Memos
▶ Payments (checks)

Multicurrency Engine
Epicor Financial Management offers a global multicurrency engine that can support an unlimited number of currencies and exchange rate combinations. Sophisticated currency management provides the ability to process transactions in any number of currencies and gives your business the global competitive edge. Any currency can be used as the base currency for all financial records and accounting books, with default currencies applied at the general ledger account, user, customer, and supplier levels. Currencies may also be selected and changed at the transaction level as well.

Each company can have up to three reporting currencies; a reporting currency is one you use to record or report financial transactions. You can, however, have an unlimited number of transactional currencies, which gives you the ability to conduct business all over the world. The powerful multicurrency engine features include:

▶ Ability to define unlimited currencies

▶ Ability to print reports in both functional and base currencies

▶ Ability to enter transactions in any currency and process payments or receipts in any currency

▶ Comprehensive functionality to revalue transactions within the General Ledger, Accounts Receivable, Accounts Payable, and Bank Accounts with the option to simply report in detail or summary, or report and post as a single reversing journal the value of the revaluation directly to the General Ledger

Rounding Engine
Epicor Financial Management also supports creation of currency rounding rules through a global rounding engine that is subscribed to by other application modules. Highly flexible and configurable, rounding rules may be created for specific customers, countries, currencies, and in support of local business or legal practices. The rounding engine supports up to three decimal places of currency precision.

Financial Management

General Ledger

Epicor General Ledger (GL) is the heart of Epicor Financial Management, processing and posting all accounting transactions created throughout Epicor applications, as well as entries made directly within the ledger. While it is seldom accessed outside of the accounting and tax departments, the General Ledger's impact is felt throughout an entire enterprise. The information and controls which flow from the General Ledger system enable an organization to operate efficiently, comply with fiscal regulations, underpin strong corporate governance, and drive enterprise performance. General Ledger provides the accounting controls and system security necessary to help ensure the integrity of your company's financial data.

Multiple Books

At the core of the General Ledger, Epicor Financial Management provides flexible financial accounting representations through multiple book functionality, which flows all the way through to financial reports and statements. "Multiple Books" allows the establishment of unlimited financial books to support a wide variety of financial requirements, such as budgeting and forecasting, statutory and government accounting versus management accounting (for example, US GAAP and non-GAAP, etc.), and comprehensive consolidations. Epicor Financial Management provides the tools to seamlessly handle the accounting representations from your various subsidiaries while at the same time giving you a consolidated view of the one version of the financial truth for your organization.

Key highlights and benefits of using Multiple Books within your company:

Chart of Accounts: Create different chart of accounts by book, post transactions to different accounts within different books simultaneously using the posting engine.

Reporting Currency: Have a different reporting currency tied to each book and even, if ever needed, assign a different period calendar to each book. This flexibility allows users with a single journal to process both the management accounts and the statutory accounts at the same time without the need for multiple transaction entry.

Multiple Closing Calendars: As businesses acquire new businesses there is often a need to maintain different calendars for "stub" periods or for example up to 18 months to bring the acquired company in line with the fiscal calendar of the acquiring business. Each established book can operate a completely independent fiscal calendar as applicable.

Calendar Adjustment Period: General Ledger has built-in support for an additional year-end period to be defined as a part of your calendar that will be used for year-end adjusting entries.

Chart of Accounts

Epicor Financial Management allows up to 20 user-definable segments within the chart of accounts (COA). These can be used for accounting and reference purposes providing the ability to record, store, allocate and report on important financial data at a highly granular level. With a total of 200 characters available, Epicor gives you the flexibility to manage your financial operations exactly as you need.
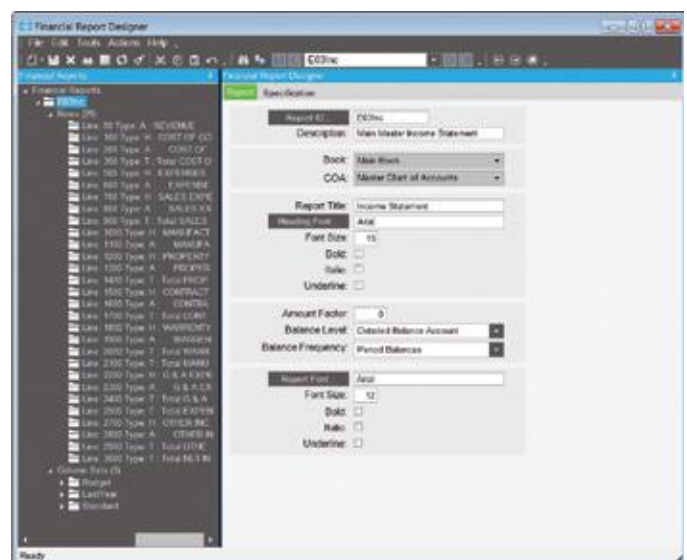
Balance Controls

Epicor Financial Management allows users to define the frequency at which balances on accounts are captured and stored. Often used to facilitate the calculation of Average Daily Balances (ADB), this flexibility enables the user to update account balances as frequently as required by the organization: by hour, by day, by week, or by month.

Consolidations and Eliminations

Epicor Financial Management meets the needs of businesses today through integral financial consolidation at either a summary or detailed transaction level, providing the flexibility to consolidate from different books and/or companies within a defined relationship.

▶ Merge balances (and underlying transactions) from one or more books into a single consolidated view of financial information, from which financial reports may be prepared, while at the same time creating the supporting elimination journal entries as a result of the process.

▶ Remeasure accounting transactions and financial results based on the differences in the consolidated currencies using differing rates types (e.g., spot, fixed, etc.).

Gain complete control over management and financial reports, such as trial balances, income statements, and balance sheets.

Financial Management

Financial Report Writer
This Financial Report Writer offers the ability to report across one or multiple books, extract, manage and arithmetically handle data calculations, format reports based on user definitions, and publish results with corresponding formats to Excel if required. Additional reporting capabilities are available with the Advanced Financial Reporting module that is part of Epicor Enterprise Performance Management.

Validation Rules
Validation rules can be configured to control what gets posted to the General Ledger from the sub-ledgers. The system will then control how transaction events are cleared to post, will not post, or will issue a warning before posting.

Post-Year-End Transactions and Adjustments
A discrete adjustment period enables accounting and finance personnel to make post-year-end adjustments such as management, audit, or tax journals supplementary to the defined fiscal calendar. This enhances audit controls while ensuring that rolled forward financial accounts, including consolidation books and retained earnings balances, are updated accordingly.

Inter-Company Journals
Inter-company journals reference accounts in other companies which have been flagged as globally available for posting transactions. Corresponding inter-company control accounts are updated upon posting in the source company. Once the transactions have been initiated, a General Journal is then created in the target company, posting to the appropriate accounts and initiating off-set journal entries to the inter-company accounts.

Account Tracker
Show the current activity and balances for the period you specify. Locate an account through word search capabilities. Summarize view with options to drill down to account detail and supporting journal entries.

Flexible Posting Periods
Post entries to any period in the current year, following year, or any subsequent year as required, even while the current period remains open.

Budgets
Enter figures for any account and year. Globally update budgets by percentage. Enhanced capabilities for budgeting are provided via Epicor Enterprise Performance Management.

Statements
Print comparisons between current actuals and budgets or previous actuals.

Basic Allocations
Automate allocation of funds across multiple accounts without manual entry.

Advanced Allocations

Automation and control of repetitive processes is one of the major benefits of using a Financial Management Suite. Manual processes such as monthly allocation and accrual entries slow down closing cycles and introduce multiple points of inaccuracy or error. Epicor Advanced Allocations automatically computes cost and revenue allocations and the resulting journal calculations, streamlining processes, increasing relevance and improving accuracy. This results in shorter close cycles and more accurate financial statements.

Advanced Allocations allows for sophisticated allocation of cost and revenue to multiple projects or departments or locations—ultimately to any entity represented in your corporate financial accounting structure. GL Allocations helps your finance staff to create, execute, retain, and reuse allocations to greatly simplify what can be an otherwise time-consuming and error-prone task.

An Allocation History Tracker keeps a detailed history of allocation runs which provides a comprehensive view of each Allocation run and all GL transactions created grouped by batches and tiers. The application allows for allocation reversal directly from the Allocation History Tracker.

Advanced Allocations allows you to:
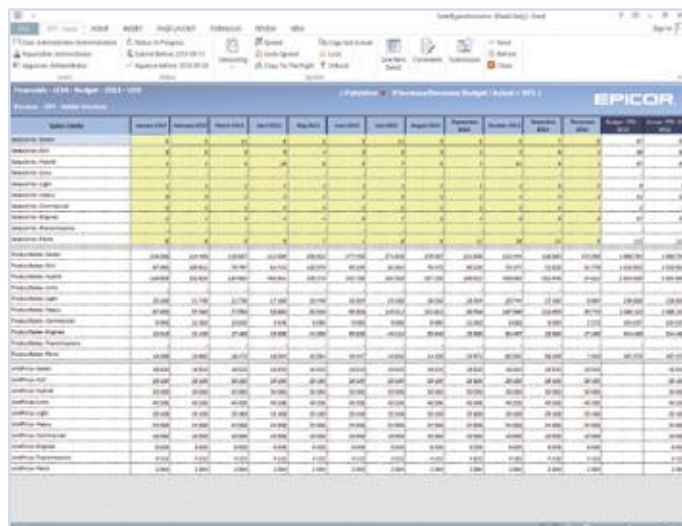
▶ Allocate an amount in a single account to one or more accounts.

▶ Allocate balances or transactions using static or dynamic calculations.

▶ Pool accounts for allocation using a direct update or offset account.

▶ Make allocations based on statistical data

▶ Base allocations on Business Activity Query (BAQ)-derived dynamic data such as monthly revenue, help desk service calls per month, etc.

▶ Structure hierarchical or tiered allocations to run sequentially.

▶ Create and post allocation journals or simply use the output of the calculations elsewhere within the system.

▶ Maintain allocation history for reuse, review, and analysis.

▶ Reverse allocations where required by simply selecting the original allocation and flagging it for reversal with a user-defined apply date.

Financial Planning

Many organizations need advanced analytics for budgeting, planning, and forecasting while at the same time wanting to have more control over these processes. Epicor offers Epicor Financial Planner (EFP) that leverages access to Epicor ERP data alongside the process controls your business is looking for.

EFP delivers a familiar, simple to use interface using Microsoft Excel for entering data and sits on top of a powerful SQL Server database for collating all planning information. The user interface offers the functions of Excel and extends capabilities by adding new features such as spreading and direct access to ERP data. By being connected to the data in your ERP system, it has the ability to pull in information such as previous actuals in order to carry out comparisons and utilizes them in the spreading function. This makes it incredibly simple and intuitive for planners tasked with carrying out budgeting tasks, freeing them to concentrate on value added tasks.

Easily manage budgeting and planning with Epicor Financial Planner Microsoft Excel.

Intuitive for the end user, EFP uses the familiar Microsoft Excel toolset, reducing training required and making updates to budget information simple and fast. The Microsoft Excel front-end sits on top of a powerful Microsoft SQL Server, containing all of the budget information that you can access and report against in an instant. This allows for focused and less complex Excel sheets, as well as the ability to carry multiple budgets and versions of budgets at the same time.

Integrated Workflow
Define the budget process for your organizational hierarchy with a flexible approval matrix. View and report on the current status of the budgeting and forecasting process with integrated reports to know exactly where you stand and identify any bottlenecks.

Templates
EFP comes with pre built templates that can be used out of the box or adapted to your needs, as well as the ability to create and define your own. By creating your own templates or using the predefined ones within Epicor Financial Planner, you know that everyone is using the same input format.

Detailed
Add line item level details behind the budget figures to give added levels of backup for figures that can then roll up to the account level budget. Also include notes on particular figures or cells that are then saved to the database and can be accessed or reported on later.

In-Built Security
The EFP security manager means employees only have access to the information you define and submit budgets and forecasts for their areas of responsibility.

Social Collaboration
Epicor Social Enterprise (ESE) further enhances the collaboration efforts of the financial planning within an organization. Communications for the budget process are driven through ESE with documents readily available for the group to understand the process and a guide to how to complete. Anyone new to the process can see from the previous interactions on the group how things have been done before. Notifications can be setup so that users are notified when a task is completed in the budgeting cycle; eliminating the need to check reports to see where people are in the process.

Accounts Payable

Accounts Payable (AP) allows you to enter supplier invoices for purchases that you make, then create payments for the invoices you want to pay. The system can generate payments for all invoices due, those for a particular supplier, or only for specific invoices. If a supplier calls you to discuss an invoice, you will have complete information at your fingertips and that history can be kept indefinitely.

Accounts Payable allows you to update both purchase orders in Purchase Management as well as actual job costs. Adjustments are created if the purchase price does not match the invoiced price. With Accounts Payable, you will know how much you owe and when it is due.
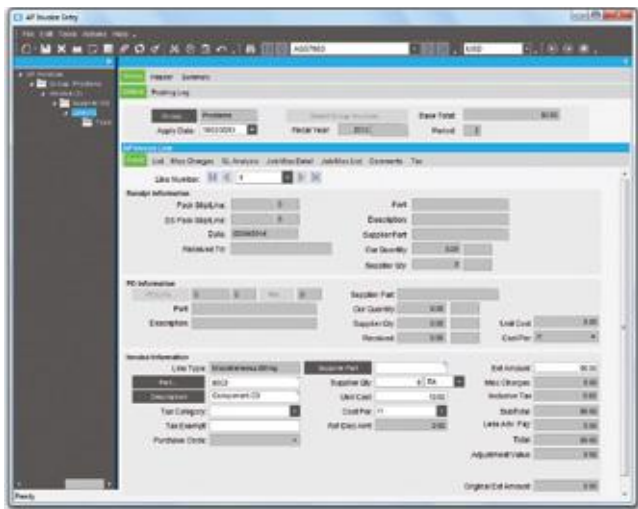
Invoices, Debit Memos, Payments
Record and post all payables instruments easily, including supplier or vendor vouchers and invoices, debit memos, automated check runs, and manual payments.

Recurring Entries
Create standard accounts payable invoices that recur on set dates.

Financial Management

Accurately manage payment of invoice due dates and terms and conditions.

AP Terms and Conditions
Epicor supports all of the most common business practice terms and conditions within Accounts Payable and Receivable. This feature also affords great flexibility for the definition of creative receipt and payments terms within countries where this functionality is not necessarily demanded but may offer a competitive advantage.

Voided Numbers
You can track or reuse voided or unused numbers or transactions that are not committed to a database. You are then accountable for all numbers and have no sequence gaps.

Checks
Print checks for select payments, or create manual checks.

Online Cost Updates
Update jobs created in Job Management directly by material and subcontract costs entered through Accounts Payable.

Exchange Rate at Payment Entry
Purchases may be made in any currency and goods received in any currency with support for the entry of an exchange rate at the point of payment entry.

History
Keep accounts payable transactions and supplier history files indefinitely.

Supplier Tracker
Show online inquiries for open invoices, outstanding balances, and payment detail.

General Ledger Interface
Automatically create and post general ledger entries from accounts payable transactions.

Cash Management Interface
All payments are automatically available for bank statement reconciliation once posted.

Purchasing Variance
View variances between planned and actual purchase price to allow cost adjustments and analysis.

Three-Way Match
Match invoice, receipt, and purchase order online.

Electronic Funds Transfer (EFT)
Configure payment files for electronic submission to banks.

Requisition Management
Keeping tight control over capital and operational expenditure is a critical priority for any organization, Epicor Advanced Requisition Management (ARM) enables organizations to gain visibility and control of procurement spending by providing an online workflow and purchase requisition tool. It gains information on their spending which supports negotiation of bulk purchase discounts from suppliers, assigns preferred suppliers for particular products, sets the right spend limits for individuals and assigns the chain of authority for approving purchase orders. Epicor ARM is fully automated and improves communication and efficiency across the supply chain.

Automated Workflow
ARM allows you to define any approval workflow and hierarchy that fits the needs for your organization, taking control and speeding up the requisitions process. This totally removes the manual movement of paper around the organization. Not having an automated workflow and approvals chain can lead to delays in approvals, holding back of an entire PO because of only one line item, exceeding spend limits, ordering the wrong items, going over budget, and allowing an unauthorized person to approve an order.

Maintain Budgetary Controls
By knowing what invoices, purchase orders, and requisitions for PO's are in the system, ARM can instantly inform you of any budget overspend and put controls in place to prevent this.

Maximize Supplier Relationships
By assigning preferred suppliers for particular products that the system will automatically suggest when raising a requisition you leverage your buying power with that supplier, leading to preferential pricing/discounts, or terms. Preferred suppliers also mean fewer invoices and thus a much lower admin overhead.

Accounts Receivable

Accounts Receivable (AR) provides a comprehensive set of tools to manage your invoicing, credit, cash management, and customer management needs. Because you can specify the creation of invoices through the order release process, you can reduce billing for a different quantity than was actually shipped. With Accounts Receivable you know who is buying what, and who is paying their bills on time.
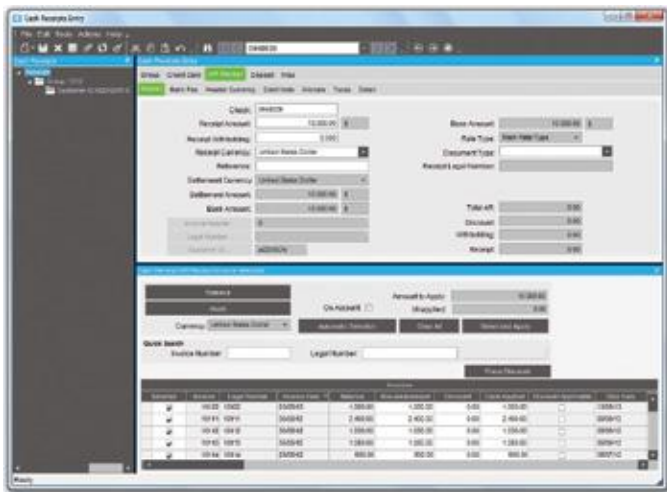
Invoice customers when products are shipped and track payments.

Invoice Entry
Enter multiple shipments for an order on a single invoice, and write unlimited comments. Invoice entry supports advance/progress billing deposits, credit memos, and standard invoices.

Cash Receipts
Accommodate payment of invoices, order deposits, and miscellaneous application of credit memos.

Debit Notes
Ability to record Debit Notes (Chargebacks) sent from the customer. Debit Notes may now be entered as part of the AR cash receiving process, and will then have their value applied as part of the settlement process. The Debit Notes may be related to specific invoices or remain unassigned.

The new Debit Note will remain as an open receivable until matched to a credit memo or subsequently paid. In addition, Debit Notes sent by customers can be recorded independently of the cash receipt process - for example, electronically received payments. They can then either be applied or produce an unapplied cash value.

Interest Invoices
Create and apply interest invoices to manually charge an interest amount to an overdue or late-paid invoice. Select a customer and choose the single or multiple invoice lines against which to generate the interest invoice. Additionally, finance charges on invoices can be generated against a customer's overdue invoice balance. Users have the ability to include or exclude the impact of credit memos when calculating finance charges.

Invoice GL Account Definition
When GL accounts need to be manually manipulated, you can allow users to update and define the GL account for each line on a Miscellaneous Invoice.

Adjustments
Allow adjustment entry of AR transactions with a full audit trail.

Consolidated Invoicing
When an invoice is consolidated, both the Sales Analysis Report and the Sales Gross Margin Report will group lines together based on each sold-to customer.

Invoice Logging
Allows the recording of invoice details with applicable input tax while the invoice remains in the process of circulating the company for review and approval. This allows you to reclaim the input tax in a timely fashion, where such practices are allowed.

Invoice Numbering
When an invoice is created, users have the flexibility to allow the system to automatically generate invoice numbers or you can manually enter numeric or alphanumeric invoice numbering schemes at the invoice type level.

Credit Holds
Automatically place credit holds on new customers or on those who are past due or over their credit limit.

Aging Information and Customer Reminder
View aging information on the screen or print it in one of several formats. Accounts Receivable offers Customer Reminder features that allow companies to track the history of their customers' AR balances together with the option to issue them user-defined reminder letters.

Finance Charges
Finance charge invoices can now generated against a customer's overdue invoice balance. These finance charges are automatically calculated based on rules defined within the Finance Charge Maintenance program. The charges can also be reviewed before they are posted.

Bill-To Customer
Provides the ability for a customer to maintain a list of allowed Alternate Bill-to (Alt-BT) customers, optionally with one set as a default. This will default onto the Quote/Order/Direct Invoice and can be changed by the user to a different authorized bill-to customer prior to posting the invoice. If no alternates have been set up then the Alt-BT customer is the sold-to customer (but using the 'Bill-to address' on that customer).

Manual Selection of Invoices
A manual selection option to get Invoices and Recurring Invoices is available within Invoice Entry. This allows the selection of particular or multiple invoices or recurring invoices for posting instead of selecting all available items at once.

Credit Manager Workbench
Easily view all credit-related information surrounding a customer. The credit manager workbench provides a single point from which to manage credit status, order credit status and account management, with drilldown to all associated information.

National Accounts (HQ Accounts)

The National Accounts (HQ Accounts) feature provides the ability to create customer relationships, either hierarchical or the more traditional parent/child type, within Accounts Receivable. This functionality allows customers within a National Account group to accept invoice payments from any customer within the relationship. The functionality also permits extensive credit checking across the National Account group with credit available to be split across levels with or without variable pooling.

Taxes

Epicor Financial Management contains a feature-rich flexible Tax Engine which allows businesses to configure Epicor applications for local and international financial reporting standards, as well as unique local tax jurisdictions.

Tax Regimes

Tax tables within the Tax Engine include the ability to define or override rate effective dates.

Sales Tax Register

Lists invoice totals and tax amounts by customer for codes on file.

Invoice/Statement Forms

Customize, preview, fax, and print individually or in batches.

Sales Commissions

Pay sales commissions at time of invoicing or on receipt of payment. Establish up to five sales representatives per order line.

Sales Analysis

Access sales history in a variety of report formats.

Credit Card Management and Authorization

Epicor Financial Management accepts credit, debit, and purchase cards as a form of payment. This functionality processes credit card authorization and payments in real time, for accounts and single or multiple transactions. Credit card data encryption meets recognized security standards for these transactions.

Settlement Currencies

You can record currency gains and losses at the time of settlement. Through this functionality, you post amounts correctly when you invoice in one currency but are paid by the customer in another currency.

Settlement Discounts

The application contains two methods for handling early settlement discounts on sales and tax values. The settlement amount is taken by the customer on the AR invoice. The potential discount is then included in the tax values calculated for VAT.

Terms and Conditions

Epicor supports all of the most common business practice terms and conditions within Accounts Payable and Receivable. This feature also affords great flexibility for the definition of creative receipt and payments terms within countries where this functionality is not necessarily demanded but may offer a competitive advantage. Terms and Conditions are user defined, but typically include; End of month plus n days, End of following month, Specific due dates in a month, 2% 10 days and Net 20 days.

Electronic Report Formats and Transmission

Submit various legal reports electronically, which are based on existing reports such as the EU Sales List, Intrastat and Tax Reporting. You can then reformat generic reports to meet your local requirements.

Customer Tracker

Perform real-time queries on summary and detailed information per customer, including sales orders, invoices and quote activity to date.

Invoice Tracker

Use the user friendly Invoice Tracker functionality to view customer invoices and payments in either summarized or detailed format.

General Ledger Interface

Automatically create and post general ledger entries from accounts receivable transactions.

Cash Management Interface

All cash receipts are automatically available for bank statement reconciliation once posted.

Cash Management

Improve cash management through the automatic handling and reporting of discounts available, payment due dates, and payment selection methods.

Bank Accounts

Specify the number and type of bank for each of your accounts, including currency.

Soft Formats for EFT

You can customize EFT formats to meet your organization's needs. These formats can match bank requirements and include remittance information.

Bank Reconciliation

Reconcile your bank statement with entries generated in Accounts Receivable, Accounts Payable, and Payroll.
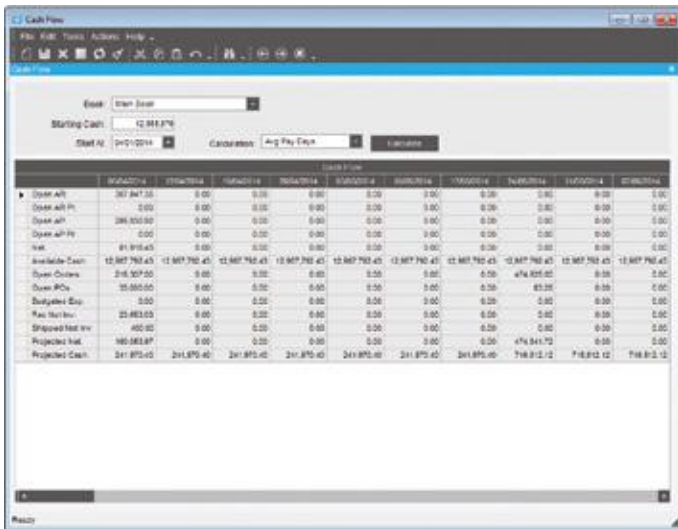
Petty Cash

Management and distribution of Petty Cash can be a difficult process. Epicor Financial Management provides the controls and functionality to handle outbound and inbound movements of cash for all types of transactions, Employee Expenses/Advances, Supplier Payments and Customer Receipts.

Cash Flow Dashboards

Easily perform cash flow analysis for open AR balances and AP amounts owed. The dashboard streamlines the process with user-defined buckets for cash flow analysis by giving an easily understood display of your outstanding receivables and credit obligations.

Manage your corporate finances with the easy to use cash flow dashboard.

Credit & Collections

Accounts Receivable is one of the largest assets of any company, and typically one of its most liquid. Most businesses however have to write-off 4% of this asset every year. This is a substantial cost to the business that can be greatly reduced with better management. Take control of your outstanding receivables and reduce days sales outstanding (DSO) through automated accounts receivable management.

Collection Management

You can manage the entire credit department with management hierarchies, optional account assignment, or through collection teams.

Centralized Activities

Integrated e-mail, phone dialer, and full reporting and analysis gives greater control over the task of collecting debt. Document phone calls, review cash forecasts, track invoice disputes, and keep everyone informed through automated communications.

Collection Templates

Best practice templates are built-in to create mail merge documents that can be sent manually or through mass e-mail to customers based on configurable rules using account or invoice information.

Epicor Cash Collect

Accounts receivable is typically one of the largest assets for any business. Yet most businesses write-off 4% of accounts receivable annually (this ranges from 1% to 9% depending on the industry). That's $400,000 a year for a $10 million company.

The longer an invoice goes unpaid, the less likely it is to ever be paid. For example, 26% of invoices three months old are not recoverable; 70% of invoices six months old are not recoverable; and 90% of invoices a year old are not recoverable.

Epicor Cash Collect simplifies, organizes, automates, and streamlines accounts receivable and collections through best practice templates, integrated mass email, and centralized reporting to dramatically improve the effectiveness of collections activity resulting in more timely payments, less bad debt write-offs and a healthier cash flow.

Deferred Revenue

Create revenue recognition schedules from AR invoices to automatically recognize revenue only when the earnings process is complete. Reports are available for both deferred revenue forecasting and reconciliation.

Payment Instruments

Track the different types of credit instruments such as Promissory Notes and post-dated checks and their corresponding status, from initial generation or receipt through to clearance/settlement. Track the movements of the payment instruments and generate status change updates within the Accounts Payable and Receivable applications. These changes can be reflected in the General Ledger to properly record to the financial status of the asset or liability. You can track how your customer credit is maintained through the life of the payment instrument reflecting the available credit based on the status and final settlement of the payment instrument. By using this functionality, you can be assured that complex, settlement-related taxes are correctly handled when payment is made via payment instruments.

Rebates

The optional Rebates module provides you with a way to enter, update, and review any rebate program that your company runs with your customers. The module lets you accumulate rebates and pay a designated sold to customer, bill to customer, or another designated customer. These rebate amounts are based on part and product group sales during a specified date range. Use this module to define the active rebate programs for your company. You can then generate the rebate transactions. Lastly, this functionality lets you pay the rebate amounts to your customers through either an invoice check or a credit memo.

Generate Rebate Transaction Process

Use this program to generate all the rebate transactions that occur within a defined date range.

Get Rebates

This Actions Menu command is found both in AR Invoice Entry and AP Invoice Entry. Use this command to turn the rebate transactions into AP invoices or credit memos.
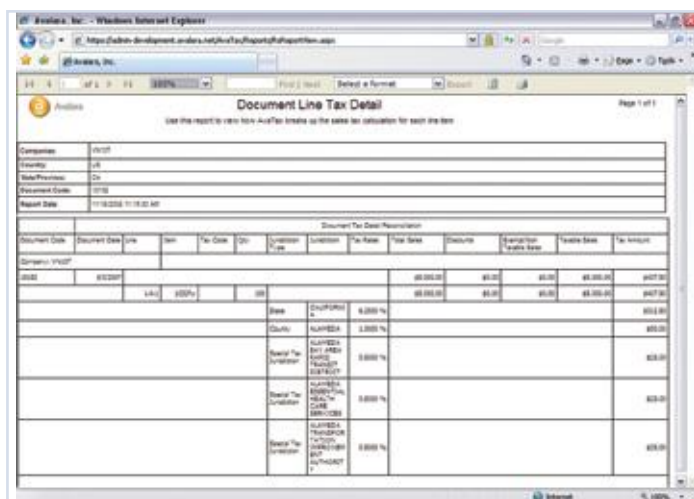
Rebate Contract Entry

This program lets you enter rebate information for a single customer or a group of customers. You define the product groups or specific parts that will be included during the rebate offer as well as the rebate breaks that the customer or customer group will receive.

Rebate Transaction Adjustment

The Rebate Transaction Adjustment program lets you review all rebate transactions.

Tracker Programs

There are two tracker programs, Rebate Contract Tracker and Rebate Contract Status Tracker that you can use to follow the progress of the rebate programs.

Epicor Tax Connect eliminates the tedious work and complexity of determining sales tax.

Tax Connect

Collecting and remitting sales and use tax is a government-required, compulsory activity. It doesn't drive revenue and it doesn't reduce expenses. So any time or money spent on tax compliance is, by nature, non-profitable. There are more than 14,500 United States and Canadian tax jurisdictions alone and the rates, rules, and boundaries change relentlessly. Keeping up with all of the tax changes is an operational distraction and a drag on the efficiency of your organization.

Epicor Tax Connect eliminates the tedious work and complexity of determining tax jurisdictions of ship-to addresses, maintaining tax codes and rates, and dealing with jurisdiction-specific and commodity-specific taxation rules. Tax Connect also provides for automated generation of sales tax returns and currently supports the United States and Canada. Epicor Tax Connect is offered as a software as a service (SaaS), on-demand address validation, sales tax calculation, and sales tax reporting and returns generation.

Activation

Activation and subscription fees are required for this service and are determined based on the number of AR invoices you process and on the number of sales tax returns you submit to taxing authorities.

Notifications

When the AR invoice is posted to GL, the service is notified for sales tax reporting purposes and for subscription accounting of the transaction.

Real-Time Sales Tax Calculations

When generating an AR invoice, the verified address and line item information is passed to the service in real-time to calculate sales tax based on jurisdiction and any applicable taxability rules. The resulting tax information is stored with the invoice in the Epicor database.

Real-Time Use Tax Calculations

Epicor Tax Connect automatically populates the required use tax values assessed for an accounts payable invoice. Users are able to configure which products and suppliers should invoke use tax processing and the solution sends this information to the on-demand service, which automatically returns the appropriate tax values to the Epicor accounts payable application.

Tax Solution Integration

Use integration to Avalara® AvaTax®, both on-demand and on-premise, which includes real-time address validation, tax rate lookup, and tax calculation.

Verify Customer Addresses

Verify customer addresses against a CASS-certified database. This is necessary to determine exactly which tax jurisdictions apply to that address. When entering or updating an address, the service will verify the address in real-time. It is capable of correcting spelling errors and adding ZIP code and ZIP + 4 if they are missing. The complete and correct address gets saved to the Epicor database.

Tax Connect 1099

Tax Connect 1099 provides Accounts Payable departments in the U.S. with a turnkey solution to 1099 reporting. Because it is Web-based, you will no longer need to purchase, install, integrate or operate software for 1099 reporting every year. As 1099 reporting responsibilities continue to grow, retail, manufacturing and healthcare organizations are among the many organizations forecasting at least a tenfold increase in 1099 reporting. With automatic updates and guaranteed compliance, Tax Connect 1099 streamlines the work required for this non-value added chore and allows you and your team to spend more time on core business activities. Not only will your team be able to address other needs, but using the Tax Connect 1099 service will also help to ensure accurate and compliant efforts, avoiding unnecessary penalties.

Credit Card Processing

Epicor Credit Card Processing is an optional global solution that integrates with industry-leading Credit Card Processing solutions for managing credit card authorization, and processing.

Epicor Credit Card Processing also implements the security guidelines as specified in the Payment Card Industry Data Security Standard including securely encrypted account numbers and key management.

Epicor Credit Card Processing includes easy to use maintenance for initial setup along with a variety of integration points to bring an easily deployable solution to your business.

- ▶ Authorization with the sales order
- ▶ Reauthorization with the sales order before picking and shipping
- ▶ Complete or partial funds collected with the sales order
- ▶ Funds collected at shipment
- ▶ Funds collected at cash receipt
- ▶ Funds credited for returns
- ▶ Reauthorization at product picking
- ▶ Reauthorization of balance when partial shipments are made

Integration with Industry-Leading Providers
Credit Card Processing works online with the PayPal™ Payflow Pro secure card authorization system to validate credit cards and debit cards. The integration can also be utilized as a framework for integration to other payment processing services.

Supports Industry Standards to Reduce Fraud
Credit Card Processing supports several industry standards, which will help reduce the possibility of credit card fraud, and will also help reduce the cost per credit card transaction.

- ▶ Address Verification
- ▶ Security Code (CSC ID)
- ▶ MOD10 validation of the account number of the credit card number without requiring a transaction with the credit card processor
- ▶ PCI Compliance

Payment Card Industry Data Security Standard
Utilizes industry standards for secure credit card information storage and display.

Credit Card Number Encrypted
Once credit card number is entered and saved, the masked account number is stored in the Epicor database as is an encrypted account number. Encrypted numbers are secured from employee lookups of customer data.

Secure Online Credit Card Authorization
Epicor uses a secured network connection to communicate with Payflow Pro and PaymentTrust. Credit card information is always safe and secure when it is transmitted, or when the results of the credit card transactions are returned to Epicor.

Credit Card Number Validation
When the credit card number is entered it is validated using the MOD10 validation to determine that the card number is in the correct format. This validation is done completely within Epicor validation process in order to catch data entry errors before the information is sent to Payflow Pro or PaymentTrust, reducing potential transaction fees.

Credit Card Format Validation
Prior to the MOD10 validation of the credit card number, if there is a prefix and/or length requirement, based on the credit card type, it is validated to determine that the card number is in the correct format.

Flexible Configuration
The credit card implementation is highly configurable. Multiple types of credit cards are supported as well as the ability to customize the credit card authorization behavior to match a customers business practices.

Transaction Flexibility
Each of the Epicor Credit Card Processing processes that work with credit cards can be set up to define how credit card transactions will be processed.

Reauthorize Reservation Transactions
This process reauthorizes credit card reservations that have expired or for other reasons need to be reestablished based on changes to the order or partial shipments.

Transaction Reports
Reports of credit card transactions are available for auditing purposes, some of which have been specifically designed for easy verification against PayPal reports.

Credit Card History
A history of credit card transactions for an order are readily available on the credit card form and previous authorizations can be easily voided or deposited.

Asset Management

Effective management of corporate fixed assets is a critical task for any size business requirement. Asset Management helps you record, track, and depreciate your fixed assets for optimal utilization. Asset Management also automates the tracking and management of the asset throughout its useful life—from acquisition to disposition. Using a unified source of asset data, Asset Management gives you visibility into your assets worldwide. Standard asset management tasks--such as asset transfers, disposals, reclassifications, and adjustments can be streamlined. Asset Maintenance also works with Epicor Maintenance Management to schedule, control and track planned and unplanned Maintenance Activities against Fixed Assets and to capture the resulting costs as required.
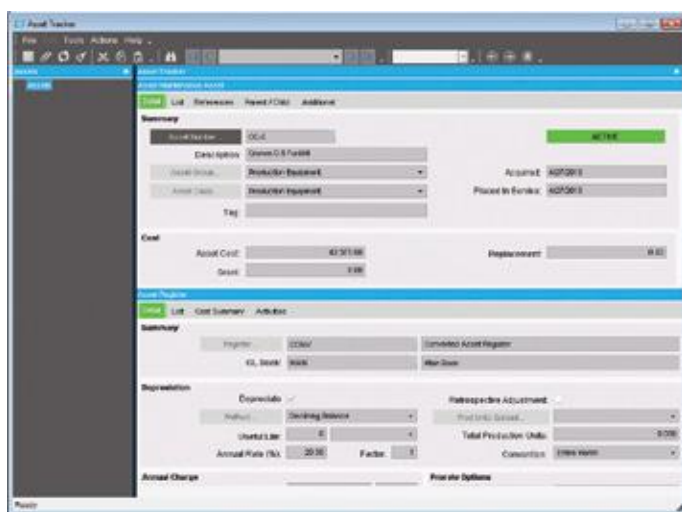
Maintain accurate tracking and depreciation of company assets.

Mass Maintenance
Asset Management allows for the updating of asset attributes for a group of assets based on a set of asset parameters or attributes that can be shared across several assets.

Asset Registers
Asset registers provide the ability to assign different attributes to an asset such as depreciation methods, service dates, estimated life, and residual values that can be used for analysis and reporting. Each Asset Register may be linked to a different General Ledger book for recording of costs according to different requirements such as tax and operational. Asset registers represents a financial view of the asset that depends on the depreciation parameters.

Asset Valuations
Assets valuations and depreciation methods are generally subject to different rules for tax and accounting purposes. This difference usually appears in timing of the recognition of the assets, the determination of their valuation or carrying amounts, and the depreciation charges to be recognized in relation to them. Asset Management provides the ability to apply different rules in parallel in order to determine different views of the asset and its activities in different GL books.

Asset Relationships
Link of assets to one another in parent/child relationships is also provided and can be used in reporting and maintaining asset activities.

Multicurrencies
Asset Management provides full multicurrency support with the ability to track the original cost, depreciation, and other activities and expenses in both transactional and reporting currencies.

Asset Depreciation Methods
Asset Management provides predefined depreciation methods including (Rate Straight Line, Life Straight Line, Sum of Years Digits, Declining Balance, Declining Balance to Straight Line, Fixed amount per Month, Fixed amount per Year). A facility to create user-defined and manual depreciation calculations is also provided.

Asset Integrations
Asset Management includes standard functionality to integrate to the Accounts Payable, Inventory, Project Management, and Maintenance Management modules to streamline broader processes associated with the acquisition, maintenance, use, and disposal of company assets.

Grants
Companies are able to receive grants against assets which automatically modify the asset carrying value and associated depreciation.

Asset Locations
Store multiple types of asset location details including the location, warehouse information and bin number.

Asset Import
Easily import assets into the Asset Management module by utilizing Service Connect

Retroactive Adjustments
Ability to recalculate the depreciation of an asset starting from the beginning of the current year.
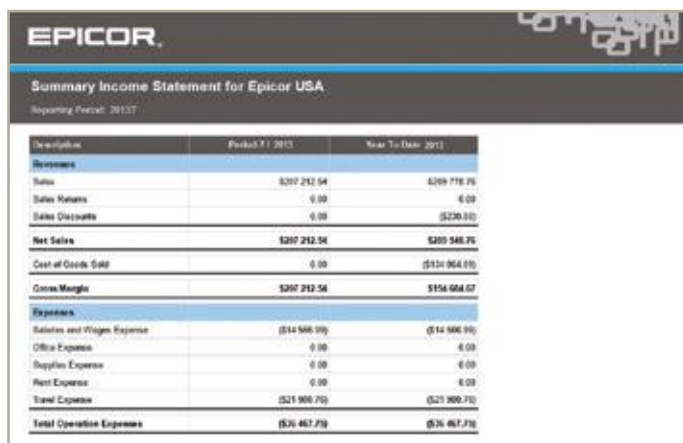
Advanced Financial Reporting

Epicor Advanced Financial Reporting (AFR) allows the creation and distribution of professional financial reports to company stakeholders. It allows the management and viewing of financial data in a user friendly and easy-to-use environment. Financial reports are different from other reports because each line has to be defined in terms of account ranges or sets for which a certain total needs to be calculated, versus other types of reports which do not require definitions of such complex groups. AFR simplifies report creation by exposing an intuitive interface which speaks to the user in familiar financial terms.

AFR creates reports using the elements familiar to an accountant or financial professional. These include spreadsheet terms such as rows and columns. It also provides an additional element of reporting hierarchy or trees allowing the viewer to generate the report for the area of the business which is their responsibility. Because the reports are parameter driven, the viewer can generate the report at any time by selecting the parameters of time, company, book or organizational element as required without the need for intervention by the financial team.

Manage, report, and distribute financial information securely.

Report Designer

Epicor Advanced Financial Reporting offers a graphical and tabular design interface that includes a hierarchical tree view of business data for easy selection of a single account or range of accounts from a single or multiple business units. AFR Report Designer is flexible and easily tailored to your unique financial data. It also includes preview functionality for designers to check numerical results of a report prior to publishing.

Row Sets

Tailor vertical report elements by identifying accounts to include based on various methods including a range of accounts; accounts derived from specific account categories defined within Epicor, or dynamic lists of accounts. Data can also include complex calculations, formatting options, and user defined expressions.

Column Sets

Tailor horizontal report elements by identifying column types including column details such as description, balance, budget, and complex calculations. Further tailor column sets by applying filtering criteria such as time, account segments, books, and companies.

Reporting Tree

Visual representation of reporting hierarchy is available with the reporting tree. The tree enables simplified generation of separate reports for each level in the tree. These hierarchical trees may be based on account segments (e.g. for department, business line, project), the chart of accounts, time based, or user defined data elements in the data dictionary.

Single Book or Multiple Books

Optimize control of operations with support of financial reporting against a single book or multiple books in a single report.

Consolidation of Enterprise-wide Data

Epicor AFR enables access to financial data from any number of companies at the same time. This simplifies consolidation across departments, divisions or companies and can improve business visibility.

Report Viewer

Report viewers can access reports online, refresh report data, and print, view online, or export reports to a number of formats including Microsoft Excel, PDF, and TIF.

Drill Down

Using the reporting tree nodes, users can drill down into operational summarizations of key business units; they can drill down all the way to the transaction level.

Electronic Payment Templates

Electronic transactions between your company and its financial institution are a standard way of doing business. In most cases, banks have unique formats required to process payments originating in an ERP system. While Epicor ERP offers several templates that can be used to format the data produced in the Payment Entry section of the software, these are additional templates maintained to match the format required by some of the key financial institutions and clearing house standards. With the Electronic Payment Templates, you will be able to process payments within Epicor ERP and produce an electronic payment file. This in turn helps improve payment efficiencies and saves you time manipulating out-of-the-box templates.

Epicor offers Electronic Payment Templates for the following banks:

▶ HSBC (Standard 18)

▶ HSBC (Hex4w in the UK)

▶ Santander-MultiBACS

▶ iBusiness Banking

Electronic Payment Templates for Accounts Payable - US Automated Clearing House (ACH)

This Electronic Payment Template provides the functionality Epicor ERP users need to create batch-based accounts payable files for supplier payments transactions. This file is formatted to match your bank's ACH file specifications. All ACH file data elements can be maintained by you with the file generation occurring at the same time as you print the accounts payable checks. A remittance advice is also printed for electronic payment suppliers. This batch-based processing provided by the ACH allows for cost effective, faster, and more secure transactions compared to the alternative of processing individual paper checks.

Electronic Payment Templates for Accounts Receivable - US Automated Clearing House (ACH)

This Electronic Payment Template is similar to the Accounts Payable Template just described, except it is for accounts receivable transactions. Again, this module allows for a faster and more secure method of receiving payments.

Electronic Payment Templates for Employee Payroll Direct Deposit - US Automated Clearing House (ACH)

This Electronic Payment Template delivers the functionality needed to create a file for employee payroll direct deposit transactions. Similar to the applications just described, this file is formatted to match your bank's ACH file specifications. The file can be generated any time before posting the payroll check entry group and supports direct deposit checking and saving transaction types. This saves the employee time and money spent physically cashing the payroll check at a bank and allows your company to eliminate having to purchase, sign, and mail paper checks.

Electronic Payment Templates for Positive Pay

Positive Pay provides the functionality needed to create a formatted file of Accounts Payable checks presented for payment against a list of checks previously authorized and issued by your company to the bank.

The functionality supports the following banks:

▶ Bank of America

▶ Bank of Boston

▶ Chase

▶ Fleet

▶ Union Bank

▶ Wells Fargo

Positive Pay helps save time when issuing checks and helps to ensure that altered checks or checks issued fraudulently are not paid out.

Lockbox

Lockbox banking is a service offered to organizations by commercial banks that simplifies the collection and processing of accounts receivable by having their customer payments mailed directly to a location accessible by the bank. Lockbox is ideal for companies with large volumes of cash receipt transactions as it automates the cash receipt process from bank files to Epicor ERP, eliminating the need for manual entry and verification.

The Lockbox module transfers cash receipts from bank files to the Epicor ERP Accounts Receivable module. Using Lockbox, you can map the fields provided by your bank with the fields required to create the cash receipts in Epicor ERP. This enables you to configure how the module will operate based on your specific needs and eliminates the need for further customization or modifications to the file layout. In addition, the Lockbox module provides the option for multiple layouts in case you work with various banks and lockboxes that have varying layout requirements.

MICR Checks

The majority of companies utilize Magnetic Ink Character Recognition (MICR) checks. MICR is the printed line commonly found at the bottom of a check that includes the key information about the check writer's financial institution including check number, bank routing number, and account.

Along with following the compatible printing hardware and fonts from the American National Standards Institute (ANSI) and American Bankers Association (ABA) or Canadian CPA 006 Banking standards, the MICR Checks module gives you the ability from Epicor ERP to print MICR lines, company logos, and electronic signatures on blank check stock. This allows you to print MICR checks without needing a preprinted check stub, saving you the expense of bulk printing fees and more expensive preprinted check paper stock.

Enterprise Performance Management

Epicor Enterprise Performance Management is an end-to-end solution that removes the barriers to better business insight through a combination of intuitive user experiences, user driven key performance indicators (KPI), and pre-packaged analytics that have real meaning to the business. Epicor EPM leverages the advanced analytic capabilities of the Microsoft platform and incorporates modern web application concepts for unprecedented ease of use and ultimately business results.

Microsoft SQL Server Reporting Services (SSRS) underpins the Epicor EPM offering and provides a flexible reporting structure for delivery professional reports and analysis to business stakeholders in a format that business users can easily consume. SSRS easily utilizes many types of data and can deliver it in a variety of formats. Because SSRS works with other applications and products in the Microsoft platform, such as Microsoft SharePoint, Microsoft SQL Server Analysis Services™, Microsoft Office, and Microsoft SQL Server Report Builder® is an invaluable tool for improved analysis and decision making in the enterprise.

Trackers and Dashboards

Built directly into all Epicor applications, Epicor Dashboards permit the combination of multiple capabilities such as inquiries, ad hoc reports, workbenches, graphical analyses, tactical business intelligence, alerts and business monitoring—all in a single dashboard. They provide a robust one-stop interface that replaces traditional menu systems with personalized role or context based views and links into core transactions of the system. In addition, they put the visual indicators and functions you use the most right at your fingertips. Tooled with unique flexibility, Dashboards enable users to develop their own workbenches using a series of online views of information such as a tracker. From a tracker, "open with" technology is deployed to drill into any part of the system, whether it is to enter a new order, modify an existing one, or update a customer record.

Closely manage customer and supplier performance with comprehensive role-based and interactive Dashboards that offer a complete picture.

The power of Epicor Dashboards is in how they enable users to specify how they work and tailor their workspace to fit their needs. The power of the Dashboard is in its ability to act much like the instrument cluster of your car. The Dashboard is used to provide real-time exception-driven indicator flags which alert you to possible problems in your business. From these business activity indicators, you will be able to easily drill down to appropriate parts of the system to see more information. Through integration with the Internet, Dashboards can merge Epicor application and external data as one to help drive your daily activities. From monitoring your employee intranet site to live access to industry-related Web sites, each Dashboard contains the information you and your employees need to more proactively run your business.

Role-Based Home Page
Optionally replacing traditional menu systems, the Dashboard is quick and easy-to-use. In fact, you can use the Dashboard as your default view to your daily workflow. By integrating access to all of your favorite functions, third-party applications such as Microsoft Word and Excel, and online help topics, the Dashboard puts tremendous power in the hands of users and makes your Epicor solution one of the easiest applications to use.

Exception-Driven Philosophy
Manage exceptions with standard components designed to offer users the ability to review the exceptions happening in the business and manage them rather than run queries, print reports and talk to coworkers to find the exceptions. The Dashboard puts the exceptions front and center for better control over your entire business.

Enterprise Performance Management

Real-Time Access To Up-to-Date Information
Get real-time updates for the latest information available. The user defines the refresh rate for each component that resides on the Dashboard.

Workbenches
Generate user-specific or function-specific workbenches that drill into detailed information, offer tailored exception management, and allow users to efficiently manage information in the system.

Trackers
Enable users to drill into the finer details of the system. Whether looking for related job or quote information or the status of shipments, receipts or financial transactions, trackers are vehicles for drilling and moving throughout the system. The Dashboard enables businesses to generate their own views of information.
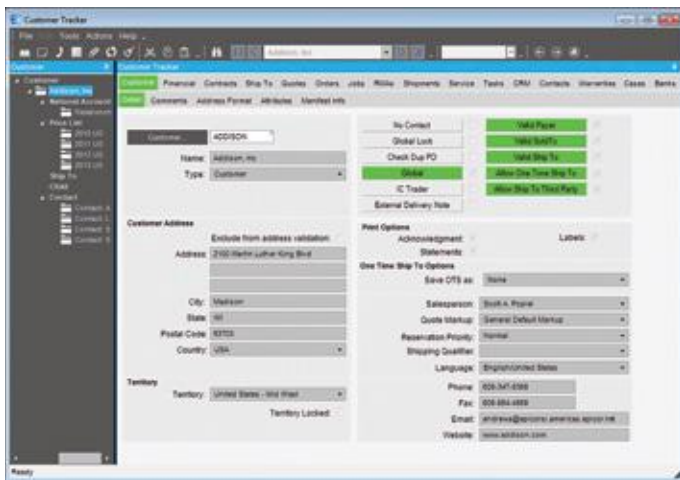
Easily create and configure your own trackers to help ensure real-time and in-context access to your most essential information.

Personalized Components
Select from standard indicators that can be used throughout your business. These components are enabled at the user level and allow you to inquire into common elements like open quotes, expiring quotes, new orders, late jobs, and unbilled shipments.

Custom Components
Quickly generate your own indicators using our intuitive business activity query (BAQ) wizard and Dashboard maintenance. This allows you to see the exceptions in your business based on your unique needs. Create detailed or summarized indicators that are focused on a particular record such as a customer. See related information by linking multiple components together and publishing based on the selected record. Advanced components can be generated while adding sheets or additional tabs to existing components.

Personalized to Fit the Needs of Users
Each user personalizes their own Dashboard by selecting the components that show up in their unique environment. The user selects not only which components to use, but the size and placement of the components in the scrollable Web page environment offered by the Dashboard.

Open to Related Functionality
Quickly navigate to other areas in the system. Right-clicking on any record in the component moves you to other areas of the system related to that record and optionally gives the user the ability to modify or add records to the system.

Web Interface
Find information more efficiently and process business requests via the Web. Fully secured Web access promotes employee use of the Web-based on your business needs.

Web Deployable
Generate and deploy components via active server pages (ASP).

Predefined Dashboards
Epicor is delivered with predefined Dashboards covering all the most common business roles (e.g., salesperson, buyer, engineers) and contexts (e.g., sales order, quote, job, invoice, etc.) that exist within the product.

Dashboard Style Sheets
Enhance consistent styles for dashboard across the enterprise, company, or within a department.

Dashboard Charting
With over 40 chart types available, visual display of dashboard information is easy and readily available to users.

Executive Dashboards
The Executive Dashboard comes with a series of graphical components designed to give managers the strategic data required to make critical short- and long-term decisions. Strategic use of these components allows you to manage your shop by exception, as opposed to micromanaging the increasing number of variables and demands being placed on your company. Components included in the Executive Dashboard include Plant Performance, Supplier Performance, Order Backlog, Scheduled Shipments, Shipping Performance, and Cash Flow.

Dashboard Assemblies

Build Dashboards into assemblies and deploy them to the server in a few clicks, as well as automatically adding them to your favorites in the menu and as a tab in the menu area. Assemblies are also available to the Epicor Everywhere™ Framework, so that Dashboards may also be generated as Web forms from XML metadata.

Self Contained Dashboards

Package and securely deploy Dashboards as self-contained forms without the need for other Epicor applications.

Advanced Financial Reporting

Epicor Advanced Financial Reporting (AFR) allows the creation and distribution of professional financial reports to company stakeholders. It allows the management and viewing of financial data in a user friendly and easy-to-use environment. Financial reports are different from other reports because each line has to be defined in terms of account ranges or sets for which a certain total needs to be calculated, versus other types of reports which do not require definitions of such complex groups. AFR simplifies report creation by exposing an intuitive interface which speaks to the user in familiar financial terms.

AFR creates reports using the elements familiar to an accountant or financial professional. These include spreadsheet terms such as rows and columns. It also provides an additional element of reporting hierarchy or trees allowing the viewer to generate the report for the area of the business which is their responsibility. Because the reports are parameter driven, the viewer can generate the report at any time by selecting the parameters of time, company, book or organizational element as required without the need for intervention by the financial team.

Manage, report, and distribute financial information securely.

Budgeting, Planning, and Forecasting

For those companies that need advanced analytics such as budgeting and planning or advanced forecasting, Epicor offers EPM Canvas Planning Server. This platform is extremely flexible and scalable and can easily handle very large implementations across multiple installations, as well as managing mixed content from multiple sources.

Many organizations need to have more control over their budget process or want to be able to test various business scenarios before they are actually deployed internally. At the same time, they also want to have an easy and flexible environment that most people are familiar with to reduce education. EPM Canvas Planning uses Microsoft Excel, Microsoft SQL Server®, Microsoft SQL Server Analysis Services and EPM Performance Canvas Server to create a very powerful platform for advanced and collaborative Budget, Planning and Forecasting—even for very large organizations.

EPM Canvas Planning

EPM Canvas Planning is a completely unified performance management solution that allows organizations to drive execution and more effectively monitor performance through integrated monitoring, analytics, and planning capabilities. It provides all of the functionality that is needed for performance management including scorecards, dashboards, management reporting, analytics, planning, budgeting, forecasting, and consolidation.

The application reaches all employees, across all business functions (finance, operations, marketing, sales, and human resources). It enables any business, regardless of size, to operate like the world's top performers. By accurate, simple and quick measurement and management of financial and operational Performance it creates unique advantages.

A Single Version of the Truth

Decisions made from a clear common perception of business gives any company a competitive advantage. The unique unified architecture of Performance Canvas helps to ensure that all data is consistently stored in the Microsoft-based database infrastructure independent regardless if it is used for financial reporting, operational control or budgeting/ planning.

Canvas Planning is a Microsoft SQL Server-based financial intelligence package including budgeting, planning, etc.
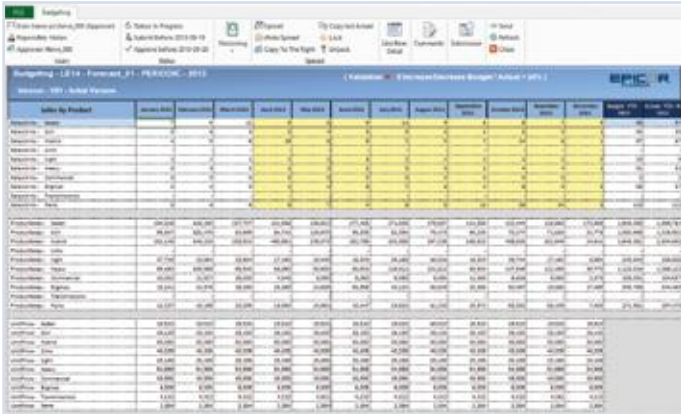
- ▶ Budgeting
- ▶ Planning
- ▶ Forecasting
- ▶ Consolidation
- ▶ Intercompany eliminations
- ▶ Reporting
- ▶ Analysis

Financial Planner

Epicor Financial Planner is a comprehensive budgeting, forecasting, and planning tool that empowers and simplifies the entire ongoing process for organizations. Comprising a full Microsoft Excel front end it takes the parts of the budgeting process that people are used to without having to learn a new

toolset and extending on this with functions such as spreading and pulling in actual ERP data. This intuitive interface sits on top of a secure SQL database that holds all of the budgeting information as well as controlling the defined workflow process for the business and security levels allocated to the budget users.

Easily manage budgeting and planning with EPM Canvas Planning Financial Planner.

Canvas Planning Business Modeler

Models that exactly match and support the structure of your business are created using the EPM Canvas Planning Business Modeler. The Modeler manages Workflow, ETL, and administrator functions such as role-based security as well as having the powerful capabilities of advanced business modeling.

Business users can design models the way they think about their business, incorporating standard financial functionality. Capabilities range from single model deployments to enterprise scenarios. Using the Canvas Planning Business modeler it's easy to do advanced multi-model planning and reporting applications without writing code.

Using Script Logic, advanced tasks are incorporated into the models such as

▶ MDX Formulas

▶ Foreign currency conversion

▶ Customized logic for specialized business processes

▶ Inter-model logic

Utilizing the high performance Analysis Services in Microsoft SQL Server, the Modeler has a built-in builder/ optimizer that creates and maintains dimensions, attributes, cubes and alternate hierarchies.

Financial Intelligence Included

Financial intelligence is a range of functions including currency conversion, allocations, intercompany eliminations, and numbers across time reporting(periodic, year-to-date, quarter-to-date, and others). Canvas Planning allows each business rule or formula to be customized to support your specific needs and financial data.

Where can Canvas Planning be used?

Canvas Planning can be used for a wide range of applications such as financial, human resource, supply chain, capital planning, sales, profitability , and many others.

Why Unified?

Most Performance Management products in the market are collections of products (integrated, not unified), each designed from the focus on a single function such as reporting, consolidation or planning. Since these functions tend to overlap in the context of business, it makes sense to have them in a unified system. The advantages are significant cost savings, fast implementation, high data integrity and high data utility.

Coding Not Needed

Users can build, share and manage their budgeting and forecasting applications without the need for coding.

Web-based Analytics

As a fully integrated part of the Performance Canvas family, creating Dashboards, Mashboards and Scorecards for both Web, Microsoft SharePoint and Mobile environments is done quickly and easily. Any Dashboard, Mashboard or Scorecard may also include data entry possibilities to planning and what-if Web-based solutions.

Guided and Contextual Analysis and Planning

Guided and contextual analysis can be gained through the tight integration between Planning, KPIs and Analytics within the same Performance Dashboards.

Slice and Dice

Analytics span from multidimensional slice and dice to rich functionality like drill-across, drill-to-detail, pivoting, root-cause analysis, and prediction.

Top-Down and Bottom-Up Planning

Top-down and bottom-up planning functionality connects people and drives accountability. Dynamic and standard reports include financial and business performance reports.

Process Management

Process management features enable business users to manage forms, workflows, submissions, approvals and reports.

Multiple Currency Conversions

Management and GAAP consolidation processes are supported with multiple currency conversions, intercompany eliminations and reconciliations, and multi-tier allocations.

Enterprise Performance Management

Operational Data Store and Data Warehousing

Your Epicor next-generation enterprise applications offer far reaching business functionality that spans literally hundreds of business processes, backed by an ever growing transactional database of information. Business performance is based not just on how these applications help run day to day processes but by how they support greater business insight—from historical reporting to advanced analysis. At the same time, although your Epicor applications are optimized for transaction processing, ad hoc inquiries and scheduling, a more advanced solution is required for when reporting and inquiry volumes increase and for longer term performance analysis.

In order to manage this need, Epicor EPM offers a comprehensive set of tools that take online transaction processing (OLTP) source data from your Epicor applications and turn it into actionable analytics.

Epicor EPM Server

Epicor EPM Server offers a comprehensive business platform for advanced data warehousing in support of packaged analyses like on-line analytical processing (OLAP) cubes, key performance indicators (KPIs), and Scorecards. Epicor EPM Server is comprised of four main applications for the end-to-end management of business insight: Epicor Cube Deployment, which manages the complete deployment process of OLAP cubes against your Epicor system; Epicor Cube Management, which monitors and handles the management of OLAP cubes, such as licensing and security or whether the cubes have been processed correctly; and Epicor Cube Customization, where users can edit and tailor OLAP cubes to include their own KPIs or measures.

Epicor Operational Data Store

Epicor EPM Server enables the creation of a total enterprise data warehousing environment, beginning with the Epicor Operational Data Store (ODS), a staging area where data may be consolidated, cleansed and stored from multiple Epicor and external systems. Epicor ODS databases provide read only access for operational reporting, inquiries such as trackers, and provides data consolidation and cleansing operations to prepare data for use within the Epicor data warehouse. Epicor ODS provides a permanent record store for historical data and relieves the impact on OLTP system performance from heavy reporting and ad hoc inquiries. Furthermore, the ODS acts as the sole source of data for the Epicor data warehouse, removing traditional complexity.
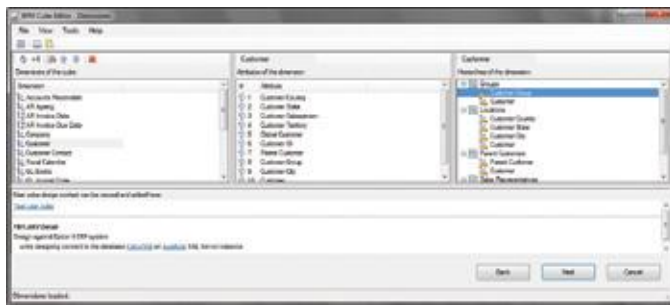
Designing OLAP cubes against ERP systems can be a complex task, but not with Epicor Cube Connect, which transfers control of cube design to end users and makes the process far simpler with an easy to use wizard and a built in Business Glossary.

Epicor Data Warehouse and OLAP Cubes

The Epicor data warehouse consists of a set of standard pre-defined data marts created within Microsoft SQL Server and OLAP Cubes created within SQL Server Analysis Services (SSAS), which provide the core data foundation for Epicor EPM applications. Each business process enabled for analysis has one or more user cubes, a data mart/OLAP cube combination which is created, customized, deployed, and managed by the Epicor EPM Server. While it is not possible to provide a single static data warehouse which meets all of the analytical needs of Epicor customers, the standard user cubes follow a set of warehouse design guidelines to promote performance and analytic data consistency across the enterprise. The use of conformed dimensions and other star-schema design best practices is employed to meet these goals.

Epicor Cube Connect

Epicor databases often store millions of business transactions. This huge amount of business data can provide valuable insights into your business and give you information that is immediately actionable—if you know how to get to it.

OLAP is the preferred way of extracting meaningful information from large datasets, because it provides intuitive analysis and makes it easier to find trends, patterns, ratios, and quantities in transactional data. OLAP is built on multidimensional data structures called cubes, which traditionally need to be custom designed for each set of transaction data. In addition, designing a cube is not a trivial task: it requires considerable knowledge of the structure of the source database. Once the cube has been created, there is no easy way to deploy it to other Epicor installations.

Epicor Cube Connect offers a unique approach to the problem of cube design and deployment. By the use of an extended data dictionary, which means that you work with a normal business language, it creates OLAP cubes for you based on the end results you hope to achieve. In other words, from the KPI down, instead of from the data warehouse up. It also contains easy to use tools for scheduling of updates and deployment of results.

This makes cube design simpler and removes the need for specialist knowledge of the underlying Epicor database structure or data warehousing techniques. Once created, cubes can be deployed immediately, or they can be saved to file for later use.

Cube Connect Management Console

Administration, scheduling and deployment of OLAP cubes is carried out via an easy to use management tool that uses Microsoft Management Console Snap-In technology, which makes it easy to run administration from any client.

Epicor EPM Canvas Deployment

Automatically create EPM Canvases from Epicor Cube Connect OLAP cubes including the Gems and Slicers used to create that Canvas.

OLAP Consumers

A set of standard OLAP consumers is defined within EPM Server to provide a common toolset for defining all analytic data views. Core consumers include Epicor EPM Canvas, Microsoft SharePoint, Microsoft Office Excel for simplistic ad hoc analysis and data mining, Epicor ICE business architecture for OLAP integration into Epicor next-generation enterprise applications, and SSRS for standard print reporting.

Content Packs

Packaged Analysis

Epicor offers a comprehensive analysis platform. Powerful and yet flexible, the Epicor analysis environment is designed to fit organizations of different sizes and in differing industries. Offering end-to-end performance analysis, Epicor delivers EPM Canvas, SharePoint Web Parts, Executive Dashboards, Excel and SSRS for ad hoc reporting.

Epicor EPM Content Packs provide the quickest and easiest way to get up and running with advanced analytics from your Epicor system. It consists of pre-packaged OLAP cubes supporting over 250 predefined KPIs that industry leaders use to measure enterprise performance. All content packs can be deployed against a single company or against multiple companies for cross-company analysis of trends and performance.

Sales Management

The Sales Management EPM Content Pack allows you to perform trend analysis and monitoring of the entire Sales Pipeline. The pack includes Campaign Pipeline Analysis and Sales Quota Performance, suitable for frequent operational performance monitoring as well as detailed trend analysis views of Quotes, Orders, and Sales by Territory, Plant, Customer, Campaign/Event, Salesperson, Part and more.

Production Management

The Production Management EPM Content Pack allows you to perform trend analysis and monitoring of production management business processes. The pack includes Quality Analysis, Plant Performance, and Open Job Analysis suitable for frequent operational performance monitoring as well as detailed trend analysis views of RMA, Non-Conformance, DMR, Projects, Jobs, Materials, and Manufacturing Lead Time by Plant, Warehouse, Customer, Campaign/Event, Salesperson, Work Center, Part and many more.

Material Management

The Material Management EPM Content Pack allows you to perform analysis and monitoring of material management business processes including purchasing, shipping, and inventory control. The pack includes Inventory On-Hand Analysis, Customer and Supplier Shipping Performance, and Inventory Turn suitable for frequent operational performance monitoring as well as detailed trend analysis views of Inventory Transactions by Buyer and Approver, Job and Assembly, Part, Plant, Warehouse and many more.

Financial Management

The Financial Management EPM Content Pack allows you to perform trend analysis and monitoring of key financial information. The pack includes Open Accounts Payable, Open Accounts Receivable, and Cash flow Analysis suitable for operational performance monitoring as well as detailed historical analysis views of AP, AR, GL, and Cash flow information by Currency, Customer, Chart of Accounts, Control Code/Type, GL Code, Job and Assembly, Project, and many more.

Scorecards and KPIs

Individual KPIs and combinations thereof, typically known as Scorecards, bring together high level visualization of business processes and business events, so that you can monitor your organization and carry out benchmarking or performance based management. Epicor EPM delivers this level of business insight via a solid and highly productive foundation to make it easier than ever to raise business performance to the highest level.

Epicor EPM Canvas

Many of the existing tools available today for KPI and Scorecard creation require data warehousing and business experts to combine for often lengthy project development. Even then, many scorecards remain static in terms of what they are measuring, and are not normally designed to handle ad hoc analysis, which is simply a competitive pre-requisite.

Epicor EPM Canvas is a new breed of native Web application designed with user self-service in mind, and for enabling agile response to new and changing business problems and opportunities. It does not demand the deep knowledge of a business intelligence (BI) professional, instead it is designed for business users without any particular BI knowledge, and uses only business terminology. Merging the two disciplines of performance management and business intelligence, Epicor EPM Canvas not only monitors but aligns and measures an organization against set goals.

Designed for All Knowledge Workers

With little or no training required, ordinary business people can monitor the status of complex business processes, graphically display performance, alert other users to issues or exceptions, and simply click on graphics to analyze them further by drilling into details. By illuminating business strategy, Epicor EPM Canvas empowers knowledge workers to put the focus on what's really important and shows how each contribution counts.

Scorecards

Epicor EPM Canvas is used to create informative Scorecards—a combination of KPIs—with various chart graphics types that include 3D pie and spider charts.

Assemble comprehensive scorecards for balanced enterprise-wide performance management and measurement.

Multiple Scorecards

Epicor EPM Canvas can be used to create both strategic, tactical, and operational Multilevel scorecards thereby enabling precision and detail in communication while resolving business issues or identifying business opportunities, thereby increasing the performance of the organization.

Gems and Slicers

A Gem is a defined term within your business. A Slicer is a tool which you use to select the information you will see in the Gems displayed on the EPM Canvas. The slicer provides a visual representation of the business term. Gems are designed to be easily usable and instantly meaningful to users throughout your organization. By dragging one or more Gems onto your Canvas you decide the business focus. When you drag a Gem onto your Canvas it uses the Slicer to instantly display a table or graph representing a perfect visualization of your business term. A Gem may contain its own preferences on what information to see, but in many cases you may need to change those preferences to fit your business terms. As you design your Gems, Slicers are also used to connect the selection criteria.

Multiple Canvases

Epicor EPM supports multiple types of canvases for different purposes like Microsoft SharePoint, Mobile, and others.

Microsoft SharePoint Canvas

Epicor EPM Canvas provides a Microsoft SharePoint connector to enhance the power of Epicor EPM Canvas scorecards and dashboards by making them available in Microsoft SharePoint, a powerful tool for creating intranet, extranet and Internet Portals.

Search Canvas

Epicor EPM Canvas may also be deployed as interactive and searchable Web experiences. With support for full text indexing and searching data can be configured to be used by almost any search engine like Microsoft Enterprise Search and Google OneBox™.

Mobile Business Intelligence

All KPIs created by Epicor EPM and deployed within Canvases can also be deployed to mobile devices for wireless access on the go.

Use Mobile EPM to review business metrics on the go.

▶ Risk Management
▶ Security Management
▶ Business Process Management
▶ Corporate Governance
▶ Global Trade Compliance
▶ Environmental and Energy Management

Governance, Risk, and Compliance

Achieving visibility and effective controls within the enterprise can be a formidable challenge when many of the processes and procedures in place remain manual and fragmented. Effective Governance, Risk and Compliance (GRC) initiatives help companies, and their employees stay compliant, and help to ensure that employees and partners at all levels of the organization are aware of the associated risks of non-compliance.

GRC touches every person and every function in an organization in some way. Whether GRC becomes an intolerable burden that increases company overhead or an enabler of efficiency and success depends upon its actual, day-to-day impact on the employees' work and whether that impact is enabling or debilitating.

Risk Management

Improved Data Governance and Protection with an Integrated Enterprise Solution

Expectations are rising among auditors, regulatory bodies, customers, and other stakeholders regarding the protection of corporate information against piracy, fraud, and sabotage concerns. Enterprise Resource Planning (ERP) systems control the majority of the information that could potentially be at risk.

It is not uncommon for companies to use multiple enterprise software solutions in different divisions or business entities. Additionally, they may be running multiple instances or copies of the same software, and have a variety of stand-alone or point solution applications—such as order entry or general ledger—that are not integrated, or at best minimally integrated. There may also be a variety of separate databases, tools, and spreadsheets used for reporting, all which may be generating different versions of the truth.
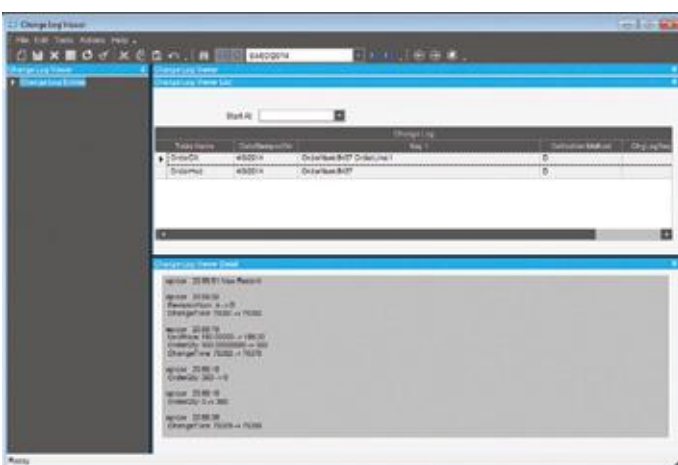
Automatically track changes with risk mitigation tools such as table and field level audit capabilities.

The only way to truly manage and mitigate risk across the organization is to have a fully integrated end-to-end solution providing your organization with one single, verifiable set of financial and operational metrics. Epicor GRC provides an integrated enterprise solution with built-in application-level risk mitigation tools and Business Process Management—providing audit trails and secure workflow automation, the key elements of data integrity and security. With the ability to generate a complete audit trail of all changes made to the data, Epicor GRC records the who, what, when, and where of the change regardless of where the change originated. When potential security problems arise, the response must be instantaneous. Epicor provides automated alerting and BPM event capabilities to assist your organization by managing these situations in a timely and effective manner.

Enterprise Performance Management

Many of the requirements for effective GRC programs involve accelerated disclosure of information to external entities. This requires companies to have better visibility of changes than they had in the past. Epicor GRC incorporates the ability to infuse business insight through Epicor EPM—a solution that supports overall risk management objectives by keeping users abreast of changes in the business. For example, Epicor EPM can be set up to alert management of the large credit exposure of one of their largest customers or can continuously monitor suppliers for adherence to contractual obligations and cost overruns on projects.

Cross-Organization Benefits of Integrated GRC Solution

The business environment today requires corporations to maintain very high standards of corporate governance and data protection. Most organizations realize that compliance with regulations that enforce these values actually makes good business sense, allowing them to reap the benefits of higher profitability, faster and more accurate reporting and increased levels of customer satisfaction. Epicor GRC allows organizations to embrace data governance and data protection strategies, help control risk, effectively handle regulatory compliance and ultimately drive business performance.

Security Management

Epicor GRC provides comprehensive user and group security to restrict data and application accessibility as needed. Security can be granted at user and group levels for all security objects including forms, fields, reports, menus, and method calls. Data tier security is also available for both tables and columns. There is also an option to use Microsoft Windows® Authentication to support a Windows single sign-on and password policy.
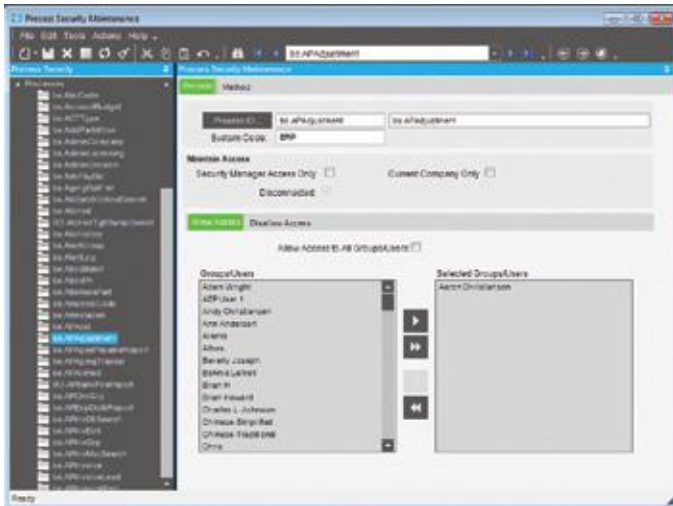
Epicor supports comprehensive management of user, process and data security settings.

Product Security

Product security includes protection to help ensure that the application only allows use of modules and product variations that have been purchased and licensed.

Application Security

Application security helps to ensure that the business logic protects the database from corruption by always ensuring that an update is valid, regardless of the source of the transaction. This is necessary in a service-based architecture since the business logic can be called from many environments including a desktop application, external web services, browser-based clients, and other smart devices.

Access Security

Access security verifies that whomever (or whatever) is attempting to access the application server is permitted to do so. This includes login security to the menu system either by entry of user ID and password, or via Windows Authentication, session security (same as login security) for application components that are run directly from the desktop or other non-menu areas, and services security through Epicor to help ensure that an external system may access the business logic when allowed.

Business Security

Business security includes ensuring that individual users and groups of users have access to the business functions and data that they attempt to view or update.

Change Logs

Automated change logs capture changes as they happen, helping companies better manage the accuracy of data. This includes monitoring all changes to records (before and after values), who made those changes, and when those changes were made. Users are also prompted for audit notes of why changes have been made. You are also able to create notifications from change log events using Epicor Business Activity Management (BAM).

Audit Logs

A permanent audit trail of access and changes is the only way to validate what is actually happening and to monitor the preventive controls and processes intended to help ensure transactional validity. The combination of preventive controls with continuous monitoring gives executives and auditors the confidence to attest to financial results and associated IT controls. Data audit logs support compliance with other regulations such as FDA Title 21 CFR Part 11, HIPAA, and Basel II to name a few of the more common regulatory requirements that companies face.

Automation Tool for Epicor

The Automation Tool for Epicor (ATE) can do everything your users can do in Epicor ERP and is a very efficient way to either run repetitive tasks that may differ only in the selection criteria or run tasks that need to be launched unattended. ATE can also be used to as part of your change management process to test the latest Epicor hotfixes using automated test scripts matched to your business activities and data. Industries that require software validation matched to intended results will benefit from this tool.

Credit Card Authorization and Encryption

Epicor credit card authorization used in conjunction with Epicor's network of global payment providers meet Payment Card Industry standards for data encryption and secure transmission and storage of sensitive financial credit card information.

Business Process Management

As the global regulatory environment grows ever more challenging for companies, it is becoming increasingly important to have embedded controls in your enterprise application so that your users can be more productive. Epicor GRC helps you move away from the management of day-to-day compliance by leveraging technology and optimizing operational efficiency. Epicor BPM in combination with Epicor Service Connect, allows you to identify risky processes to your organization and to effectively mitigate risk through business-defined workflows.

BPM and Service Connect essentially identify and improve processes to make your business more efficient, more disciplined, and better able to adapt to change. BPM is particularly important when it comes to the management of GRC internal controls, processes, and procedures. Many of today's businesses have already spent the time and effort to document and outline their business processes, some to meet strict regulatory and quality standards for their industry and others for improved business efficiency. Epicor incorporates BPM technology to enable organizations to automate, align and streamline business processes for continuous improvement and compliance with GRC guidelines.

BPM and Service Connect provide a framework for building GRC process-driven integration points that give companies seamless integration capabilities with other applications and businesses. BPM automates delivery of information to employees internal to your organization that are responsible for managing and monitoring internal controls. Service Connect logs workflow processing for both transactional integrity and compliancy. Service Connect processes are available for review and tracking while in progress or after the process completes.
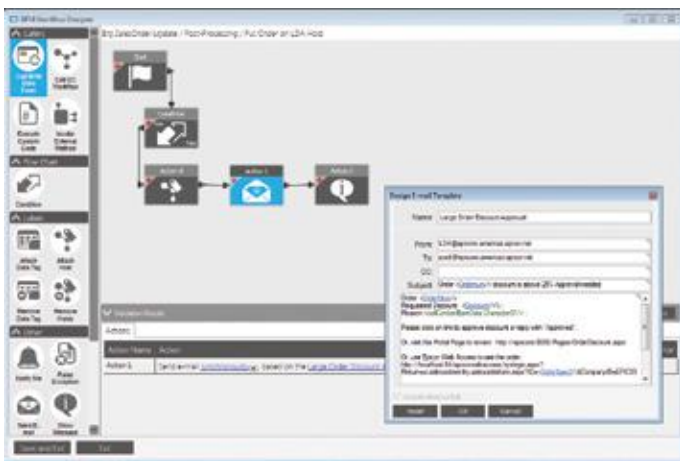
Help to ensure transactional integrity and compliancy of data using Epicor BPM to manage hold and event actions.

Service Connect Workflows
Build and execute workflow throughout the system for your unique business rules.

Electronic Signature
Invoke and require electronic signature for processes with secure authorization and password.

Corporate Governance

The current business environment is simultaneously complex and increasingly regulated, which can challenge even the largest businesses to remain competitive in today's global markets. This fact is perhaps most important when it comes to financial control—which encompasses all aspects of the financial health of the organization. Epicor GRC helps control this risk—effectively enabling users to handle regulatory compliance and ultimately driving business performance by providing cross-organizational financial visibility and control over financial reporting, planning and forecasting processes.

Organizations are under increased pressure to file accurate financial results in a timely manner. While spreadsheets may have provided an adequate solution in the past, as reporting deadlines shrink and controls become more stringent, they will no longer be a viable option. Epicor GRC can help organizations meet these shortened deadlines in a variety of ways—from consolidating financial information to providing drill-down and drill-across access from financial reports to transactional detail.

Bottom line, when companies adequately report, plan, budget, forecast, and periodically review and update budgets and forecasts, they exhibit a more mature level of internal control. A company that is unable to perform these functions well can play a major part in motivating financial fraud and not living up to the tenets of financial laws and legislation. Integrated enterprise software applications go a long way in helping organizations document their internal controls, remove manual processes, and achieve greater visibility to their financial data.

Epicor Financial Report Writer
A standard part of Epicor General Ledger, Epicor Financial Report Writer provides the ability to meet GRC reporting needs through comprehensive financial statement development, reporting and distribution, including publication out to a spreadsheet.

Financial Planner
Epicor Financial Planner is a comprehensive budgeting, forecasting, and planning tool that empowers and simplifies the entire ongoing process for organizations. Comprising a full Microsoft Excel front end it takes the parts of the budgeting process that people are used to without having to learn a new toolset and extending on this with functions such as spreading and pulling in actual ERP data. This intuitive interface sits on top of a secure SQL database that holds all of the budgeting information as well as controlling the defined workflow process for the business and security levels allocated to the budget users.

Advanced Financial Reporting

Epicor Advanced Financial Reporting (AFR) allows creation, management and viewing of financial data in a user friendly and easy to manage environment. Financial reports are different from other reports because each line has to be defined in terms of account ranges or sets for which a certain total needs to be calculated, versus other types of reports which do not require definitions of such complex groups. AFR simplifies report creation by exposing a user friendly interface which speaks with the user in financial terms without requiring familiarity with SQL query syntax or the database structure.

AFR creates reports using the elements familiar to an accountant or financial professional. These include spreadsheet terms such as Rows and Columns. It also provides an additional element of reporting hierarchy or trees allowing the viewer to generate the report for the area of the business which is their responsibility. Because the reports are parameter driven, the viewer can generate the report at any time by selecting the parameters of time, company, Book or organizational element as required without the need for intervention by the financial team. AFR helps organizations support GAAP, IFRS and Sarbanes-Oxley regulations.

Manage, report, and distribute financial information securely.

Global Trade Compliance

In order to conduct business globally, you need enterprise business software that enables compliance with local laws, satisfies international security measures and meets the myriad of local and regional documentation requirements. Epicor applications provide a comprehensive platform for managing these trade compliance necessities.

Global Trade Standards—Items

Epicor GRC allows for the definition of the global trade standards for items, such as UPC UCC-12, EAN UCC-13, EAN UCC-8, and GTIN-14. Application functionality allows for a global trade standard to apply to an item and in the process creates a global trade standard bar code which is able to be scanned on any part number field.

Landed Cost

Landed cost functionality offers significant benefits for customers who import or ship in materials either for resale or for use in manufacturing. The cost of freight, insurance and import duties can have a big impact on margins. This functionality allows businesses to track costs accurately against the parts to which they apply, ensuring that the selling or assembly price then reflects the true cost of the materials, parts or finished goods.

Country of Origin

Epicor GRC supports the needs of manufacturers and distributors by tracking Country of Origin, which supports the percent of Content by Country requirements that are needed for ISO extension in Europe.

RoHS/WEEE Compliance

The Restrictions of Hazardous Substances (RoHS) directive and Waste Electrical and Electronic Equipment directive (WEEE Directive) set collection, recycling and recovery targets for electrical goods and are primarily directives that affected all companies selling electronic equipment into the European Union (EU). Epicor GRC supports tracking the compliance status of parts in accordance with various legislative requirements while also tracking the ultimate consumption and disposal of those targeted parts to help ensure the proper compliance with RoHS and WEEE directives.

Product Lifecycle Management

Epicor PLM serves as a central knowledge repository for process and product history, and promotes integration and data exchange among all enterprise users who interact with products. Epicor PLM offers integration with more than twelve CAD systems while managing all documentation associated with a product throughout its entire lifecycle. Additionally, Epicor PLM supports GRC initiatives through sophisticated document management, critical for those organizations that need excellent audit tracking and control of documentation across the enterprise, including support for RoHS.

International Shipping and Documentation

Epicor GRC supports integration with manifesting and international export shipment processing solutions, which provides for functionality to track hazardous material shipping for both domestic and international shipments. There is also support for international trade agreements such as NAFTA. Epicor GRC can also provide the harmonized tariff schedule (HTS) codes, which determine eligibility for preferential status under international trade agreements such as NAFTA, and print the necessary export documents as part of the international shipping process.

Track and manage compliance status of parts subject to international directives.

Quality Management

Industry and regulatory compliance requires three basic capabilities: process control, documentation and visibility. The Compliance & Audit solution, implemented in concert with Epicor Advanced Quality Management core capabilities, enables you to automate your business processes, share key information, provide process documentation, traceability, and track existing and potential issues through effective resolution. Epicor Advanced Quality Management provides audit trail visibility of inventory transactions occurring in inspection and during discrepant material report (DMR) processing. Additionally, to help businesses manage compliance documentation such as Certificates of Analysis (COA), Certificates of Quality (COQ), or Certificates of Compliance, Epicor includes the ability to check for Certificates of Compliance at receiving of materials from suppliers, receiving of in-process parts from outside operation suppliers, and before shipping products to customers.

With planning to production coverage for quality, Epicor Advanced Quality Management puts companies in a constant state of compliance. Quality Performance Management provides turnkey support for ISO, automotive (TS), aerospace (AS), and FDA (cGMP, FDA 21 CFR Part 11).

Environmental and Energy Management

As the world continues to analyze energy availability and the long-term effects of climate change, businesses too are turning their attention to areas of opportunity—reduction of carbon emissions, energy conservation and supply chain sustainability. Despite the fact that government incentives in this area are still in their infancy, many businesses are finding that these initiatives go beyond simple good-citizenship to real business opportunities and bottom line savings that can contribute financial value to the organization while meeting demanding customer requirements.

In the near future, having the ability to maintain and track carbon emissions will become a much more strategic initiative within most organizations. While an emerging area of business, Epicor has many solutions that are targeted at environmental and energy management.

Companies will look to IT and software solutions to help them find opportunities to be better stewards of the environment and extend the tangible benefits of corporate social responsibility (CSR) through the extended supply chain. Some of the more notable areas that corporations are placing emphasis on when deciding on a path to good environmental and energy management surround strategic sourcing and procurement, logistics, application of lean principles, and virtualization.

Energy Monitoring

With Energy Monitoring from Epicor Mattec MES, you can solve even the most complicated energy use and planning problems. We help businesses reduce energy consumption and pinpoint energy savings opportunities right at the source–by monitoring energy use on equipment. It doesn't matter what your energy agenda or focus is, we can give you the power to achieve your goals; ISO 50001, ISO 14001, SEP, energy savings, environmental policies, sustainable practices, corporate citizenship, and social responsibility.

Logistics

Logistics software can manage the fastest distance from point to point; reduce fuel used and carbon emissions created during transport. Truck route optimization is at the heart of logistics benefit to CSR. The value of logistic applications is as simple as getting from point A to point B: optimized trucking and shipping routes mean less miles traveled, less miles traveled means less gas used by trucks, less gas used by trucks means less CO_2 emissions. Epicor has strategic relationships with industry leading logistics providers such as Appian Logistics Software to support your needs for strong logistics management.

Help to ensure optimized delivery routes and lower miles traveled by your fleet, ultimately reducing costs and carbon emissions.

Lean Principles

One way for manufacturing and distribution based companies to enable supply chain sustainability across their extended organization is to implement and follow lean principles within their respective organizations. Epicor supports the underlying principles of lean manufacturing and distribution by enabling process improvement initiatives meant to build effectiveness and efficiency across the entire supply chain.

Virtualization

The introduction of virtualization technology into enterprise applications can lead to a significant reduction in energy consumption, as there are fewer physical servers to power, and less cooling is required to dissipate the heat these servers generate. Energy consumption is rapidly becoming a far from trivial issue for organizations. Epicor supports efforts to conserve energy by providing the delivery of enterprise applications through the use of virtualization technology.

Enterprise Process Planning

The Enterprise Process Planning (EPP) solution helps you visualize, define, improve, and implement your new or updated business processes. This dynamic tool allows you to rapidly improve the way you do business by capturing critical business processes that you can use to model, document, and deploy to everyone in your organization, at any time. It also allows you to analyze processes to make sure they are as lean as possible. All of these factors improve efficiencies, enhance the way you can conduct your business, and drive a greater return on your ERP investment.

EPP replicates the structure and components of business in a model that drills down to individual staff roles and the tasks they undertake. At the push of a button, procedural details in the form of numbers, text, tables, images documents, and videos can be added to the structure. The model's content can then be deployed to your Intranet as a Web or Word document. Any subsequent changes you make can be republished instantly to the applicable parties involved with the process. Because EPP is a model, when updating processes the user only needs to make a change in one place. EPP automatically updates all

affected areas and shows where the change might create a problem. Process documentation created by other means, such as flowcharting tools, require users to remember each place that may be affected by a change and to hope that the updated flowcharts and text are in sync. This can lead to mistakes and a longer revision process.

Through the use of EPP, Epicor offers unique leverage for an ERP implementation investment. Building off the base of collected information to facilitate the ERP implementation, you are able to develop an agile and dynamic business environment.

Epicor Knowledge Mentor

Epicor Knowledge Mentor (EKM) enables you to easily create, deploy, and manage custom training content and documentation unique to your Epicor solution. EKM can help your company realize and extend the benefits of your Epicor solution investment by improving your employees' knowledge of and ability to utilize the software. Through its unique capabilities, Epicor Knowledge Mentor provides an interactive approach to learning. The training content shows users through various outputs how to use the system exactly as it will be configured in their own work environment. This leads to fewer potential mistakes, improved ownership of their work, and ultimately helps improve the investment you made in your Epicor solution.

Epicor Knowledge Mentor simplifies the way you develop and deliver training materials and documentation. It mitigates the initial and on-going challenges inherent in end user adoption by providing a set of tools to support your end users with resources and reference materials they need now and in the future. EKM significantly saves the time it takes to create training materials by using a single source capture approach that yields multiple types of output that target common adult learning styles. These multiple outputs help ensure the learners are getting the most out of the training curriculum that will help them best learn and retain this important information. The EKM outputs include:

▶ Read: provides user guides and job aids for reference

▶ Show: demonstrates through simulations how to complete tasks in automated scenarios

▶ Try: allows users to practice with various supports in a nonproduction environment

▶ Test: measures users' knowledge and provide feedback on performance

The training content can be translated into over 40 different languages and is easy to access through HTML links that can be downloaded on desktops or mobile devices.

Business Architecture

Epicor designs and builds its enterprise applications from the ground up using state of the art connected systems architecture. A connecting systems focus was chosen because ERP thrives best as a high-performing approachable service, connecting people, systems and processes. Business strategy today is so very tightly coupled with technology strategy. And technology is partly responsible for shaping the culture within a company that ultimately drives competitiveness.

The pace of technical change worldwide is also unlike anything seen in history. Successful companies recognize and manage how to benefit from technology without becoming trapped by their old practices and systems when new technologies come online. This is what business architecture is all about. Good architecture separates concerns, allowing areas of the business to evolve independently while also relying on each other to contribute to the success of the organization.

Epicor follows this same principle–separating the design and development of our technology platform from the applications themselves. The tools and frameworks help to ensure users have a consistent user experience across the system, lets people collaborate with ERP constantly in context and provides tools for users to create an ERP experience for themselves that's optimized for their work. This unique blend of tools and technology is called Epicor ICE.

Epicor ICE

Epicor ICE is the business architecture that underpins the Epicor enterprise business software and offers a true service oriented architecture. This agile business process enabling technology builds on an already complete and robust framework. The toolset is helping our customers to both use and enhance Epicor applications at a business as opposed to a technology level—with minimum overhead. Epicor ICE addresses the following key needs of modern enterprises:

Reliable
Downtime is very expensive and many companies now run 24x7x365. Although a company's employees may not be on the premises 24x7, many systems are up and running 24x7 to service the needs of global operations and their customers who can access the system via the Web or increasingly the Cloud. Epicor ICE allows online backup and complete fail-safe options. Ensuring availability meets the most rigorous service-level agreements. It also supports corporate social responsibility initiatives in areas such as hardware and software virtualization, for more efficient environmental and energy management.

Epicor strongly believes that investments we make in our products to run well in the Cloud benefit every customer, even those who run ERP on premises. Our improvements in deployment, management, and operations are a have been extremely useful to all customers.

Scalable
Whether your business is at a single location or spans multiple sites around the world, Epicor offers scalable and easy to deploy solutions for simple to complex operations. In particular, for deployments requiring high end scalability, all business logic

within Epicor applications is encapsulated within objects that are executed via application servers. These in turn communicate with the database via data servers. An enterprise can utilize multiple application and data servers in order to deliver the required level of performance to the enterprise. Epicor ICE also allows an enterprise to split itself up on multiple servers that can be deployed around the globe—delivering maximum performance to the local company. However, a powerful messaging infrastructure helps to ensure real-time collaboration of information for delivering the same control and data access as if the enterprise existed on one centralized server. This combination of technology delivers unrivaled scalability.

Agile
A service-oriented approach to enterprise software development helps to ensure an abstraction of complexities in terms of how business systems are built and operated. In an SOA, business logic, that represents software processes is broken down into a series of loosely coupled granular "business services" which are then made available and discoverable on a network via web services. Each service provides functionality that can be adapted to the needs of the enterprise while hiding the underlying implementation details. By exposing business processes, SOA provides the ability to streamline those business processes, which in turn promotes agile change management. Because business processes are broken down into smaller functions that can be accessed and manipulated, it becomes much easier to match your business rules to the processes in your business system.

Epicor goes a step further by considering both server business logic and client business logic as "business services." This delivers a technology resource that's not just built for change, but is designed for people. Epicor ICE reduces the cost and complexity of technology adoption by being completely ready for business.

Accessible

Epicor ICE includes the Epicor Everywhere™ Framework for complete user interface and device control, including utilizing Microsoft .NET Windows desktop application technology to provide users the most effective platform in order to maximize their environment. Historically a Windows client meant that applications could only be effectively operated over a local area network (LAN). Desktop application technology allows users to connect to the application not only over a LAN, but over wide area networks (WAN). The Epicor Everywhere Framework uses metadata so that user experiences can be rendered for a number of devices and platforms. For instance, your Epicor applications can be deployed as Web forms in almost any Internet browser or deployed to almost any mobile device. Epicor ICE also helps to ensure that all application logic is exposed securely as web services to allow users to connect with business logic via their chosen mechanism and to enable greater access from other applications and businesses.

Flexible

Epicor ICE also provides flexibility for the client deployment with support for Windows forms, Web forms, and Mobile device forms. Additionally, Epicor ICE offers flexibility in deployment model with support for on-premise installation, external and co-location hosting and multi-tenancy software as a service (SaaS).

Customizable

Epicor ICE has a built-in customization engine based on Microsoft Visual Studio® .NET that allows companies and individual users to customize and personalize their environments without the need to alter existing source code, thus avoiding costly upgrade costs.

Epicor ICE uses a layered approach to customization. Customizations are held within the database, but in a separate layer, ensuring portability from release to release with minimal effort. At the base layer there are no customizations. Epicor Partners and end users can create industry specific customizations within the verticalization layer for streamlined deployment and utilization by those industries. Then, site specific customizations can be made in the customization layer and finally on top of site customizations, individual users personalize the system for optimum usability. As a software vendor, Epicor can continue to add functionality to the base without interfering with customizations executed on successive layers. This is called the Epicor Layered Client Stack. Customizations created in the Epicor Layered Client Stack can be written in C#, VB.NET or a combination of both.

Also embedded into Epicor ICE business architecture is a comprehensive BPM platform. Epicor BPM allows users to build their own business rules into the application without the need to touch the base source code, avoiding costly upgrade issues.

Productive

Epicor enterprise business applications are delivered with a dedicated user experience—application forms that can be rendered in a Windows desktop application or Web application. However, Epicor understands that to maximize user productivity, application capabilities need to be extended out to a broader community of users than those who typically spend their time within that dedicated experience. To that end, Epicor ICE also supports composite applications, typically delivered via Web Portals and immersive applications, where application logic is surfaced up within common office productivity tools, like Microsoft Office. This helps to ensure that all users, no matter what their chosen tool may be, can be as productive as possible.

Also embedded into Epicor ICE business architecture are a series of Web application concepts that raise user productivity to the next level again, such as Enterprise Search for rapid access to relevant information and support for subscription technologies, like really simple syndication (RSS) that proactively push information to users.

Connected

Connecting people, systems and processes is the primary goal for modern ERP applications. Systems work together through integration, which are tightly-coupled using application programming interfaces (APIs) and standard protocols like SOAP or loosely-coupled using simple message exchanges or REST. Epicor ICE helps to ensure that every application has a robust API which is available using multiple methods and protocols.

User Experience

Epicor ICE delivers user interface (UX) options that are at once easy to use, rich and intuitive, and give users choice in deployment and experience. Unique technology within Epicor ICE offers the ability to have multiple user interfaces interact with the business logic using a Windows desktop application, a browser-based web client, or Microsoft Office applications.

All UI options are intuitive, flexible, aesthetic, and promote user productivity.

Flexible Deployment Options

As your business grows and changes, you need a solution that can grow and change with you. Epicor ERP can be deployed on premise, hosted, or in the cloud, providing unprecedented flexibility. For example, if your business has limited IT resources you may opt to initially deploy the solution in the cloud.

As your business changes you may subsequently opt to redeploy Epicor ERP on premise. If your company has multiple sites or establishments, Epicor is one of the few vendors to have architected a full multitenant software as a service (SaaS) and on-premise version out of a single product and is the only vendor who has deployed it to customers.[1]
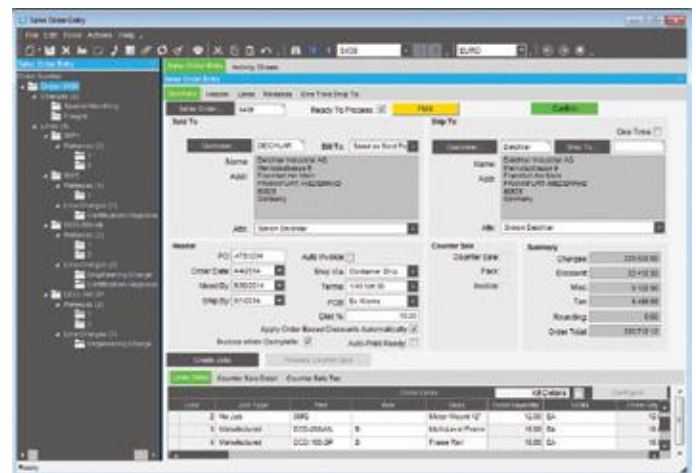
Epicor Everywhere Framework

Today many enterprise applications are being rewritten to support mobile devices and browser-based clients, which provide easier more convenient access to business information and easier deployment. These clients are generally considered "zero-footprint" or "thin" clients. Rather than rewriting our application forms to support mobile devices and the Web, we developed the Epicor Everywhere Framework, a unique technology that stores all client business logic as tagged XML metadata. This permits Epicor applications to run as desktop applications or Web clients or on mobile devices, all from the same source code. This framework also helps to ensure that user customizations and personalization remain intact, no matter what UX platform is being used.

Epicor Everywhere provides a rich user experience over the Web.

For example, you can customize your Windows desktop forms to meet your specific business needs and then simply re-generate the form's metadata and output it as a Web form with all customizations included. ICE delivers a new usability feature whereby a Web user has the option of switching to the Windows desktop application for certain forms, thereby running a hybrid application designed to improve performance and user flexibility. In addition to this key feature, Epicor ICE introduces "Group By" and Personalization" functionality for Epicor Web Access forms similar to that found in the Windows client version.

[1] Magic Quadrant for Single-Instance ERP for Product-Centric Companies, Gartner Inc., September 11, 2013

Epicor Windows desktop application offers many rich usability features.

The web technology in Epicor ICE generates "pure" HTML – no plug-ins required. Epicor Web forms combine HTML, JavaScript and XML or JSON message formats produced from the desktop application form metadata. For added flexibility Web forms can be accessed from many different browsers, including Microsoft Internet Explorer®, Mozilla® Firefox® or Apple Safari® and can run on most common operating systems, including Windows, UNIX, Linux, or Mac®.

Epicor Mobile Access

In Epicor ICE we have extended the Epicor Everywhere Framework to support mobile dashboards which are rendered as Web applications that may run on a number of mobile devices including BlackBerry® and iPhone. Since the mobile dashboards that support Epicor Mobile Access are built using the dashboard technology and Updatable BAQ technology, it is simple to create Web applications that implement business functionality on mobile devices. Epicor ships with sample mobile forms that can be copied, modified, and customized to meet specific business requirements.

Epicor Desktop Client App

Epicor takes full advantage of Microsoft's .NET forms technology to deliver an easy to use, rich user experience in a traditional client environment. Windows desktop apps are easily deployed and managed client applications that offer users a powerful interactive experience—an experience that takes advantage of local resources to connect intelligently to distributed data sources. Business workers can take advantage of increased opportunities to extract, consume, analyze, and distribute information to help create new products, expand into new markets, streamline business procedures, and provide better operational control. The Epicor desktop app delivers the rich functionality that users expect, including: tear off sheets; user sizeable screens; navigation trees; non-modal forms; publish and subscribe; advanced searches; drag and drop attachments; drill down navigation and exploration; and online help and tutorials.

Unlimited Comments
Enter unlimited comments throughout the system.

Keyboard Shortcuts
Personalize keyboard shortcuts for all functions.

Tool Tips
Provides for user controlled (on or off) fly-over text-based tool tips.

Indication of Attachments, Memos, Audits, Etc.
This feature makes it visible to users when memos or attachments are present.

Open With
Simplify navigation throughout the system with "open with." Right-click on any field to highlight all related areas of the system that can be accessed. The client desktop app automatically associates all open forms together. Changes in one form affect the information the subscribing forms show.

User-Defined Searches
Define your own searches in all parts of the system. Search criteria can be saved and reused in the future. Auto-load searches can be applied to forms so the search is automatically applied when the form is opened. Auto-search can be applied so that when a form is opened, the search screen is automatically opened.

Cut-and-Paste
Cut-and-paste information to and from all areas of the system and other applications (e.g., rows can be cut and pasted to and from Microsoft Excel).

Transaction Visualization
View all transactions within a user-defined tree structure, allowing users to pinpoint information even in the largest of transactions.

Form Worksets and Navigation
Select multiple records to work with during a session. Move forward and backward within the set. Go straight to a particular record. Save to work with it later or e-mail to a colleague to process.

Advanced Grid Management
Freeze multiple areas of a grid vertically or horizontally so multiple areas of a grid can be seen simultaneously. Multi-tiered "group-by" functionality quickly makes sense of large amounts of data. Sort multiple grid columns.

Personalization
Personalize the way in which all forms look for users; how many forms are viewable; tab order; fonts; colors; menu shortcuts; tree view; hide panels; change grid orders; whether specific interaction dialogs should be suppressed.
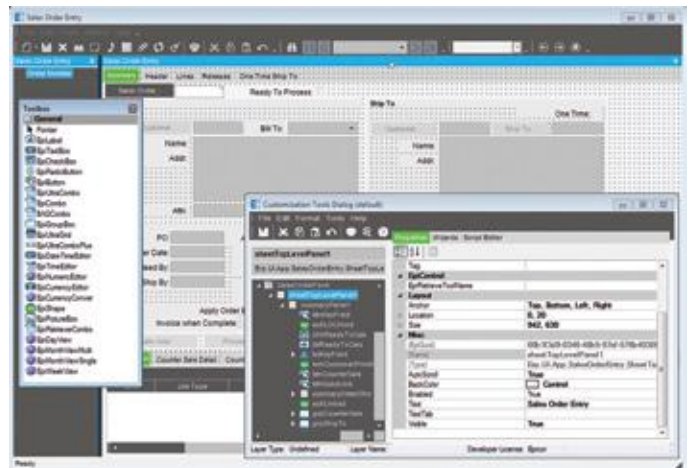
Embedded tools allow you to personalize and customize forms to meet your processing preferences.

Customization
Do everything available in personalization. The customization engine is based on Visual Studio .NET. Build multiple versions of forms; add user fields; add user logic; add sheets; add Microsoft Visual Basic® .NET or C# code; hide fields; make fields mandatory. Layered customizations help to ensure no impact on upgrades.

Customization Wizard
Customization wizards are available to streamline the use of the customization and personalization engine. This ability allows "visual behavior" for a field or set of fields and can be extended to include the setting of behaviors for fields in any defined view based on complex comparisons.

Dynamic User Defined Fields
Supports a range of user-defined fields in all primary tables in the database. You can extend the Epicor schema via customization to include any number of additional user-defined fields against such tables thus allowing unlimited growth in usage of these fields which may be used for both customer installations and for Epicor localizations.

Localization
Localization refers to the fact that Epicor is designed for global-ready applications. Epicor utilizes Microsoft's standard development practices to help ensure that resources that require localization and translation have been separated from the rest of the application's code so that source code need not be modified during localization. To enable this, the Epicor ICE customization engine has been extended to include a separate localization layer. Creating a separate framework localization layer makes version migration easier for customers and localization partners and provides an area within the framework and application for the development of local add-ons which go beyond the needs of the base application. In addition all non-numeric data is processed, transmitted and stored as Unicode characters.

External Update Method Available On All Business Objects

An external update method (UpdateExt) is available on all transactional business objects to support bulk updates via integration engines such as Epicor Service Connect. This method implements the functionality to accept a complete dataset containing hierarchical data and multiple records and to call the base Update method of each business object repeatedly for each row in the dataset and for all records in the dataset. Since all processing is conducted on the server within one service call, the use of this method eliminates much of the latency within the Web services and improves performance for bulk updates.

Styling and Themes

Styling offers complete control over the look and feel of the entire user interface. It works by letting you define the look of each item within the interface—buttons, check boxes, fields, etc. Because themes can be deployed for a company or plant, multi-plant and multi-company deployments can set their unique theme for easy recognition and brand loyalty.

Information Worker

According to current industry surveys, desktop productivity tools are used by 95% of business workers, with Microsoft Office as the standard for desktop applications. Epicor Information Worker provides a secure, seamless interface to your Epicor application from within Microsoft Outlook, Microsoft Excel, or Microsoft Word, blurring the lines between enterprise software and desktop productivity software to create a single immersive solution. Imagine the productivity and business visibility you will gain by using Epicor Information Worker as an interface for both traditional and non-traditional Epicor users.

The underlying architecture behind Information Worker provides direct access to updatable BAQs. Information Worker also is able

Epicor Information Worker lets you view, modify, and update business data from within familiar Microsoft Office applications.

to call Epicor Web Access forms as well as desktop application forms from the Information Worker menus.

Extend the Reach of Epicor Applications

Many business workers simply don't need to utilize all the powerful features of your Epicor applications, but they do need access to the data. Epicor Information Worker allows authorized users to retrieve, view, and modify Epicor data. Epicor application licenses are utilized efficiently—minimizing the licensing impact on your organization and easily allowing more users access to your Epicor solution.

Work in Context, Online, and Offline

With Epicor Information Worker, you no longer have to leave what you are currently doing to get the data you need. Simply download the data directly into your Microsoft Office application. With a few clicks of the mouse, add Epicor contacts, tasks, calendar items, and other data into your Microsoft Outlook lists. Outgoing and incoming customer emails can be automatically logged as calls. Customer, supply chain, manufacturing, and customer relationship management (CRM) data are all available online or offline.

Support Your Customer Relationship Initiatives

Epicor Information Worker can help you exceed your customers' expectations. Your customers will be impressed with how well everyone in your organization knows the details of their account anywhere, anytime. Your sales organization, customer service workers and business executives—everyone in the company—can easily retrieve and update information within Microsoft Office while at work or on the road. The powerful combination of Microsoft Outlook, Word, Excel, and your Epicor data empowers all business workers to offer informed and responsive customer service, which translates to higher customer satisfaction.

Business Activity Query

Every business needs an intuitive and easy to use query engine, and for this Epicor created business activity query (BAQ), which allows you to create personalized queries or to copy standard queries. Once the query is created, it can be used throughout the application—to generate SSRS reports, for quick searches, or to view results in a Dashboard. Epicor BAQ lets you create queries that display the data you need, when you need it.

Easy to Use Wizards

The BAQ Designer includes easy to use wizards to help you define your query—or you can create the query free-form. The BAQ can be accessed from various parts of the application.

Graphical Links

A graphical display for table links.
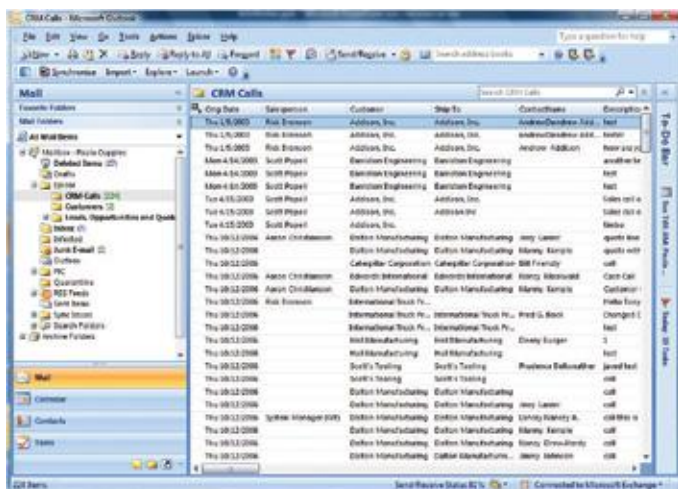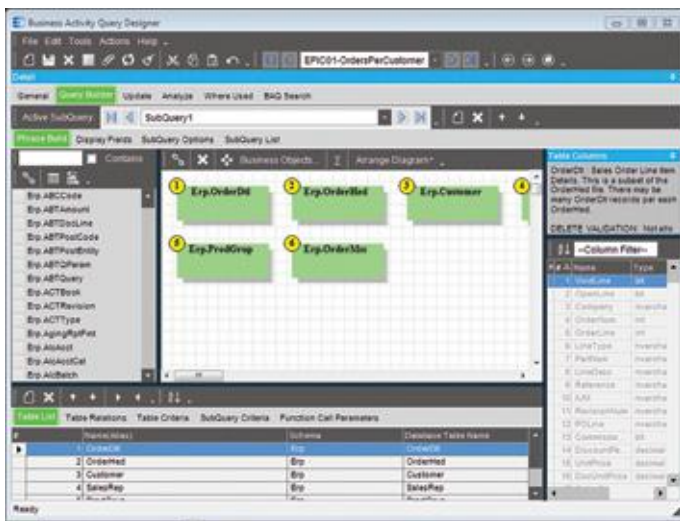
The BAQ Designer provides many easy to use features for creating business queries.

Calculations
Embed calculations within query data for rapid reporting and use throughout.

Views of Data
Create multiple views of standard system information for rapid reporting and dashboard generation. Also, allow multiple instances of a single table.

Easily Analyze and Test Your Query
In addition to providing a visual presentation of the query being created, the BAQ designer also provides tabs where you can analyze, test the syntax, and run the query to confirm the query is correct before it goes into production. There is also a tab to display where an existing query is being used—dashboard, quick search, or dynamic report. The BAQ designer provides all the tools you need to quickly and easily create queries that return the relevant data you need.

Updatable BAQ's
Our ICE platform and the BAQ designer has been extended to support updatable Business Activity Queries (UBAQs). The query designer supports both the ability to update the database via the new External Update method or, to update via a BPM directive which in turn may call a Service Connect workflow for complex updates. In either case the update is performed through the framework business objects thus protecting the integrity of the data. The UBAQ is supported in both dashboards and in the Mobile framework. UBAQs are enabled for a user via User Maintenance as "Advanced BAQ Designer."

External BAQs
ICE allows your business activity queries to connect to external data sources. This means your BAQs can drive dashboards and other views using data from other systems. Dashboard views can be combined and linked on a single page, which lets you can be on a single page, you can create an integrated customer application that provides a broad view of information across systems.

Dashboard Applications
The Dashboard designer provides a standardized user experience and supports U BAQs. While the dashboard designer can run dashboards in interpreted mode, UBAQs are only available when the dashboard is deployed as an application or as a mobile dashboard. When configured with UBAQs, the dashboard behaves in much the same way as a regular Epicor form thus allowing the user to construct dashboard applications that streamline the business process.

Business Process Management and Workflow Management

Epicor takes into account the real-life circumstances that define your complex and dynamic business environment, both during planning and the actual process. Embedded within Epicor applications is a comprehensive and flexible workflow solution that gives you the tools you need to respond quickly to critical business requirements. The workflow facilities available within Epicor enable you to quickly begin managing and automating even the most complex business processes, including working toward ISO certification. Epicor Workflow Management is comprised of five major components: Task Management; Workbench Views; Business Activity Management (BAM); and Business Process Management (BPM).

Task Management

The Epicor Task Management system allows you to connect your people with processes and the ERP system itself. As business processes become more complex and more dynamic, it's important for any enterprise application to recognize situations and then help drive people toward the right efforts and the right decisions.

Multi- and Single-Tiered Task Management
Define workflow processes which key transactions must follow for completion. Tasks may be a single step process, or they may be a series of interlinked processes involving many different parties. Create custom workflows specific to your business using task sets. Task sets may define a single step process or a series of interlinked processes involving many different resources. Task sets can contain Multi-level tasks, milestones, mandatory tasks, and alternative routes.

Task Definition

Define tasks to accurately represent the work to be done within your enterprise. Tasks can be created on-the-fly, or users can select from predefined tasks (e.g., pricing approval, revision update, generate quote) to identify different types of work to be completed. After creating a task, you can assign it to the appropriate employee.

Electronic Sign-Offs

Optionally require password clearance for sign-off on key tasks, providing traceability and adherence to procedures. Task sets help to ensure that transactions can only be updated if the task set is at the right status.

Streamline

Categorize tasks by type, streamlining assignment and task set generation. Task types are user-defined (e.g., to-do, urgent item, follow-up) and simplify categorization of work.

Task Lists

Specify task lists to each employee, and automatically deliver them to the area where the work needs to be done.

Message Log

Document e-mails and calls regarding the task with a message log.

Automatic Assignment and Routing of Work

Automatically assign tasks using required resources and the context of the transaction. Dynamically assign task sets based on circumstances. The task management system will automatically assign and route the work needed to process the change.

Staying Up-to-Date

Choose to have Epicor automatically send an e-mail notifying key personnel when a task has been created or completed.

BPM tools allow you to fit the Epicor business software to fit your business requirements.

Send Alert

Automatically and immediately send an e-mail alerting internal or external resources when key areas of the system are changed. E-mails can be automatically constructed by Epicor, or you can construct sophisticated HTML-based e-mail messages.

Carry Out Processes

When critical information has changed, automatically carry out processes to update other parts of the system.

Workbench Views

Epicor provides a series of role based workbenches to streamline and expedite workflows throughout your company. Workbenches provide a focused, paperless, single entry point from which internal and external users can automate and execute routine processes. Epicor comes with many predefined workbenches including buyers, planning, engineering, inspection, service, sales, credit manager, and plant workbenches.

Business Activity Management

Epicor extends Workflow Management with integral business activity management (BAM). BAM enables you to build simple proactive business rules into any of your system transactions and has four major components:

Change Log

Identify key data areas to track including who, what and when data has been changed.

Alerts

Immediately send an e-mail alerting internal or external personnel when key transactions have been changed. E-mails can be automatically created or you can design rich HTML e-mail messages using related information from your database. You can specify e-mail addresses manually, use scripts to identify e-mails based on rules, or automatically derive e-mail addresses based on transaction-specific information.

Execute Processes

Automatically execute a process to update other parts of the system when a key transaction has changed.

Manage Exceptions

Easily activate alerts, enabling you to immediately begin gaining control of potentially expensive exceptions. Epicor includes a library of predefined alerts ranging from "customer credit hold flag changed" to "employee clocked out early."
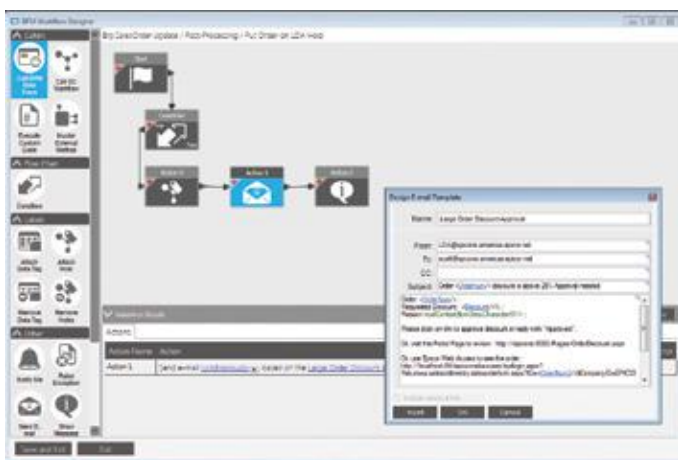
Business Process Management (BPM)

Building on and extending beyond the simple rules enforced by BAM, Epicor Business Process Management is all about identifying and improving processes to make your business more efficient, more disciplined, and better able to adapt to change. Epicor incorporates BPM technology to enable organizations to automate and streamline business processes for continuous improvement. Epicor BPM augments your current efforts of continuous improvement by allowing you to more closely tailor your Epicor solution to reflect the best practices you have developed.

Seamless Integration and Workflow Capabilities

When coupled with Epicor Service Connect, Epicor BPM gives Epicor customers seamless integration capabilities with any application service. Epicor BPM automates delivery of information to customers and suppliers directly from within the Epicor application. As an integral part of the Epicor business architecture, Epicor BPM provides a layer to each Epicor service for applying rules and conditions whether the service is called from a client, another service, or another program. Epicor BPM includes the ability to track data changes within the database and automatically send alerts or print reports when change events occur.

Easy-to-Use Designer with Wizard Interface

Epicor BPM directives are built using a workflow designer tool coupled with an Microsoft Outlook style rules wizard. BPM intercepts service operations and then invokes your custom Method Directives to perform actions before, after, or in place of service operation.

Every Method Directive is executed as though it were part of the standard code itself. Epicor BPM will allow the simultaneous update of changed rows to support new BPM method directives and to improve processing performance.

Pre-Process

Epicor BPM allows you to build pre-process conditions that require approvals or other conditions to be met before processing continues. For example: require approval for customer credit limit change.

Post Process

With Epicor BPM you can automate post process routines such as an Epicor Service Connect workflow that provides integration to an outside system, send an e-mail, invoke a .NET method, execute code, or create a record such as a workflow task.

Base Process

Epicor BPM also lets you replace an existing service operation with your own.

Collaboration

Epicor understands the value that mass participation and collaboration, with the Web as an enabler, can bring to business. Substantial advances and the ongoing maturity of the Internet have brought new levels of productivity and self-evident usability to today's technology consumers. Even the rise in social computing and related technologies has an outlet in enterprise business software, and are manifested in capabilities such as enterprise search and presence. Epicor ICE merges these emerging technologies, often referred to as Enterprise 2.0 with Epicor's services architecture to deliver unprecedented support for harnessing knowledge, rapidly finding information, and taking collaborative actions upon it.

Social Enterprise

Epicor Social Enterprise (ESE) is a collaboration solution that provides a fundamental shift in the way organizations collaborate around a project, a customer incident, a quality issue, a procurement challenge, or a planning event. It enables people to fully engage within their businesses and leverage their ERP data in the process to make more informed decisions. Online social engagement reduces the frequency of company meetings, improves the speed of decision making, and ultimately drives a new level of business efficiency. Fully embedded within Epicor ERP to deliver easier access to business information, Social Enterprise fosters cross-company collaboration by bringing social media concepts and contextual ERP information together in a single tool. This allows people to share information with each other, working together to solve problems (crowd sourcing), whilst building up a knowledge base repository in which good ideas are never lost. Because it is an embedded component of Epicor ERP, ERP users already have the know how to subscribe and unsubscribe to the information relevant to their role in the business.

Embedded Capabilities

Whether collaborating on an order, creating a knowledge base for a specific service activity/job or documenting changes to a Project, the streams of information in ESE are stored for the life of the ERP. Employee knowledge can be stored in secure repositories available with your ERP system and leveraged in the future. Information will not be lost when moving from one release of Epicor ERP to another. Unlike external collaboration tools, integration with ERP is inherent and there are no complex integration projects requiring maintenance and no links that need updating that result in additional costs and complexity. The information in Epicor Social Enterprise is always available, always up-to-date and like the rest of the data in your ERP, protected by regular backups and disaster recovery plans.

Business Notification

Epicor Social Enterprise offers an extension in business notification to the robust capabilities of Epicor Business Process Management (BPM). BPM allows organizations to manage their business processes, ensuring compliance as well as reducing risk by controlling processes or managing by exception. With ESE, a notification framework exists to deliver secure messages through activity streams of Epicor ERP data or employee responses. These streams can then be acted upon and responded to in a secure way. Social Enterprise does not require the same level of administration as BPMs, reducing overhead and system maintenance costs. The intuitive nature of social networking tools is one of the primary strengths of these types of tools. They are easy to use and do not require significant investment in training. Epicor Social Enterprise builds on these concepts to allow users to start using the tools with little or no knowledge.

In-Context and On-Demand

Users can easily subscribe to get in-context information by choosing to follow an entity or object within Epicor ERP or by subscribing to an existing notification stream. The user can choose to subscribe to the object/entity or stream as and when they want for the life-cycle of the entity or until they no longer wish to receive updates about this. While the process of subscribing and unsubscribing is simple, the information in the stream is always presented in a controlled manner taking into account user rights and roles, meaning that the information is always displayed in the context that is most relevant to the recipient.

Activity Streams

Activity streams can be used to monitor changes, conversations or even groups or discussion topics. Activity streams can be displayed in a web-browser or within the ERP with the click of a button. Streams can be adjusted to present information relating to a specific entity, process or event based on how the notifications are configured.

Monitor changes using activity streams within an Epicor application.

Collaboration

Collaboration enables new types of business processes offering new levels of engagement across the sales, purchase, project management and delivery, manufacturing, service execution, and finance management processes. Social selling, collaborative project management, service activity coordination make your organization stronger improving response times, close rates and Net Promoter Scores (NPS).

Collaboration can be managed and focused on a specific business object such as a customer, a purchase requisition or even a complex multi-phase project. Users can easily interact with each other around Epicor ERP to deliver additional value to customers, to other internal stakeholders as well as to each other. Users can easily create a group and actively ask colleagues or even customers, partners and suppliers or teams of people can come together in virtual groups to manage communication, find solutions to problems or simply share information about a common area or interest.

Knowledge Base

Epicor Social Enterprise leverages social media concepts like #hashtags and mentions (@username) to allow easy categorization and grouping of messages. Bringing together contributions from across the organization and the value chain means that information can be collected in a single location with or without the user needing to interact with the ERP. Recommendation or endorsement of content supports the creation of knowledge bases and reusable content that can be referenced easily using powerful search and filtering capabilities that can be accessed from within the ERP or from a separate application.

Enterprise Content Management

Enterprise content management (ECM) supports paperless operations and reduces document control costs by enabling users to easily add documents and retrieve information from nearly everywhere within the system. Epicor ECM delivers essential attachment/document management capabilities by extending them to include use of Microsoft SharePoint document repositories. This means that document versioning is also supported along with the option to integrate to other best-of-breed document management systems.
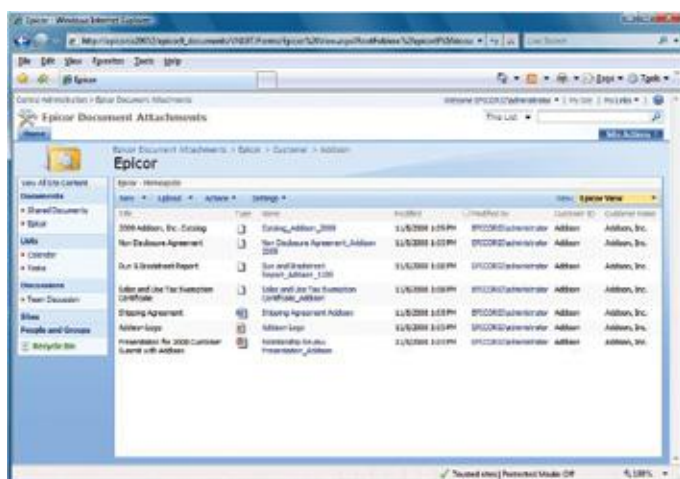
Streamline document control with an integrated Microsoft SharePoint repository.

Drag and Drop Attachments
Epicor supports drag and drop document attachments, document versioning, and advanced document meta-data tracking and searches through attachment vaulting in Microsoft SharePoint. The electronic document is not stored anywhere in the system; just the file location is stored and linked to the business object used in the form. Multiple content management storage options are supported including; SharePoint Document (documents stored in a SharePoint document list), File System Document (documents stored in a defined file system location), Attachment Link (specific document link to a file location), and Collaboration Link (specific link to a SharePoint Document List).

Simple and Secure
Simply drag and drop a document from your secure document repository and the system generates a secure link that can be accessed based on user network security.

Retrieval
Retrieve documents for viewing, editing, or printing by contextually searching within your Epicor application and accessing related attachments.

Document Viewing
Epicor ECM offers support for industry leading AutoVue™ 2D Professional Desktop Edition and AutoVue 3D Professional Desktop Edition for viewing of hundreds of file formats. These include technical document types such as 2D/3D CAD and Electronic Design Automation (EDA), as well as business documents such as Office and Graphics. These solutions also include redlining capabilities.

Product Documentation Workflow
Automated product documentation workflow helps to ensure the flow of accurate product documents to the production floor for viewing, redlining, and updating of drawings and other documentation related to the product, process, or material used.

Enterprise Search

Today's business workers are typically savvy internet users in their personal lives and have come to expect the same sort of access and community in their business lives. Epicor delivers Enterprise Search, which brings the Internet search experience to ERP. Enterprise Search provides embedded search capabilities through tag clouds of Epicor structured data that span all Epicor applications built upon it and extends beyond enterprise data, to un-structured data (Word documents, etc.) if desired, and in a secure manner. Epicor Enterprise Search also supports extensible actions from search results including task specific actions, internal and external service calls and direct links to applications or application forms in context.

Secure Search Results
Business workers will be able to search data that resides within the Epicor application as well as data stored locally, on the network, or on the internet. Application data search results are returned to workers based on access rights—if a user is not permitted to view certain data, it will not be listed in the results. Search results are bound to the BAQ security rules—if a user does not have access to columns, they are not displayed for that user.
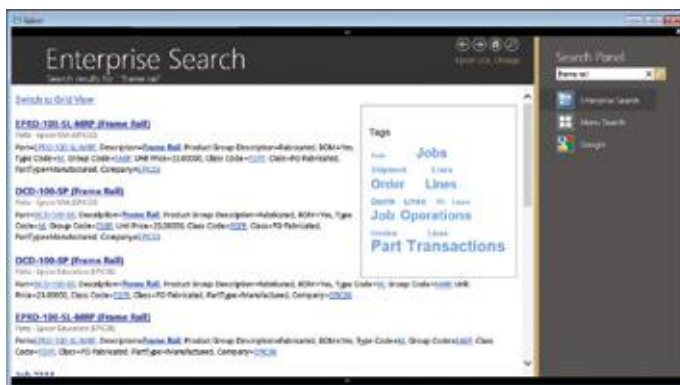
Epicor Enterprise Search delivers search options for relevant business information in a format similar to Google.

Easily Find Relevant Business Data

With Enterprise Search, business workers are no longer tied to traditional ways of accessing information—now they can specify exactly what they are looking for and pick and choose from the result set to see the data. Enterprise Search will also include the ability to "drill down" into related data. For example, if you search for a customer, you will be able to see results that drill down into sales orders, invoices, payments, or CRM calls, to name a few.

Get the Information You Need Right from Your Browser

With Enterprise Search, users get the information they need with less input and without having to move from form to form within the application. Enterprise Search allows you to set the sensitivity level so you don't get irrelevant data.

Search Administration and management

Configuration of Enterprise search and of the BAQs that populate the search is available in the Epicor Administration Console allowing much easier system configuration.

Subscription Services

Epicor ICE extends RSS subscription capabilities to Epicor application data. This means that business users may subscribe to specific information that they wish to be kept appraised of. By subscribing to a particular query using RSS, users will see information proactively pushed to them when the data behind that query changes. For example, a user may wish to attach an RSS feed to a particular contact at a customer site. Any time something happens to that contact they can receive a note about it. RSS information can be pushed to your container of choice including the RSS Feeds Outlook Syndicated Content (RSS) Directory within Microsoft Office or via Windows Gadgets.

Composite Applications

Enabled by the Epicor Everywhere Framework, Epicor application Web forms generated from metadata, and their related linked business logic, can be used in composite application development. Each Web form supports publication and subscription, allowing specific business functionality to be "mashed-up" with other line of business developments.

Mashups

Within Microsoft Office SharePoint Server it is possible to build composite applications that combine various connected Web Parts, such as Epicor Web forms, Epicor Web queries, Epicor EPM analytical Web parts, and more.

Mobile

Enabled by the Epicor Everywhere Framework, Epicor application Web forms generated from XML metadata, and their related linked business logic, can be accessed via mobile device. Additionally, Epicor EPM KPIs can also be deployed direct to mobile devices and include full search capabilities to rapidly find and drill-down to applicable data.

System Tools

Epicor ICE offers a series of system facilities and tools to enable the effective management of Epicor applications, extending to system security, document management, advanced software development, software deployment, and product documentation.

Centralized Administration Console

This feature delivers a single management area for your Epicor system, which removes redundancy and in so doing boosts user productivity, accuracy and efficiency.

System Monitor

Schedule tasks to be run in the background on a one-off or regular basis (e.g., daily, weekly, monthly, etc.). Tasks can be jobs such as MRP or reports and forms. Reports and forms can be frozen at a point in time so the data can be referenced at a future time.

Integrated E-mail

Automatically e-mail employees, suppliers, customers, and partners from the system based on key actions. Attach documents so the recipient need only click on the attachment to drill into the associated transaction.

Separation of Epicor ICE from Epicor Applications

Epicor ICE business architecture is developed separately from Epicor enterprise business applications, allowing each to be modified and updated in separation and potentially under differing release cycles. Epicor ICE framework components have been extracted from application source control and given their own build and delivery schedules resulting in a more robust application development environment that allows staged delivery of Epicor ICE to application developers using the Epicor ICE software development kit (SDK).

Multiple System Agents

ICE gives the ability to run Multiple System Agents. This feature allows customers to set up multiple defined areas for generation of reports and processes. Application servers can now be located on many different physical servers to distribute the processing load, or remain on just a single physical server. Multiple System Agents also allows for greater flexibility in system tuning and security configurations. Epicor also provides the ability to execute reports on alternate databases. A System Agent can be expanded to have connection information for alternate database servers. This allows a user to log in once to a company and run reports using data from an alternate reporting database, thereby offloading reporting overhead from the main transactional database.

Extended Reporting Framework

The reporting framework within Epicor ICE allows optional Server based printing. This is done via the creation of an Enterprise (or Server based) printing option for users who wish to leverage the associated Microsoft SQL Server Reporting Services (SSRS) or other enterprise reporting software.

Epicor's server-based reporting option includes Microsoft's SQL Server Reporting Services (SSRS). SSRS reports add the capability to e-mail and fax reports in addition to printing from the server or previewing on the client.

Customizable Printed Forms

Access the laser-generated and preprinted customizable continuous forms that are provided with auto-fax and e-mail capability.

Auto Print Control

This feature handles the automatic printing of forms and barcode labels upon the completion of a predetermined list of Epicor transactions. Auto print control lets you define the events that trigger the printing, rules that define the conditions, and the action to take on a form-by-form basis.

Advanced Print Management

Automate document delivery with Advanced Print Management. Whether e-mailing, faxing, or printing and mailing.

Support for Multi-Version Environments

The Epicor ICE framework now provides the ability to define and manage certain master data elements and processes across an environment that includes multiple versions of Epicor solutions.

Security

Multi-Company Menu

This feature provides secure access to multiple companies without having to close all forms or carry out different logins when switching companies.

Operating System Security

Epicor ICE provides the option for Microsoft Windows Authentication and Windows Single Sign-on and Password Policy.

Method Security

Secure the types of processing users are able to carry out (e.g., allow a user to update an existing part but not add a new part) by user or group.

Data Level Security

Secure which data users are allowed to access. This can be done at a dataset (e.g., all sales order information), data table (e.g., sales order header information) or field level (e.g., sales order due date).

Security Reporting

More closely manage user security with security reporting.

Online Edits and Audits

Monitor all changes to records (before and after values), who made those changes, and when those changes were made. Prompt users for audit notes of why changes have been made.

Date and Time (Using Server Time) and User Name for Auditing

Epicor ICE introduces a true date time field which involves the creation of a Microsoft SQL Server style date/time data type or data control that can then be used by application developers to easily render local time. All date fields are of this date/time data type and are only stored in universal date format.

Automation Tool for Epicor

Every business is looking to automate the routine activities so that staff can focus on the value added tasks. Epicor ERP has many capabilities built in that can simplify and automate individual tasks however every business is different and mass automation requires a slightly different type of tool. The Automation Tool for Epicor (ATE) can do everything your users can do in Epicor ERP and is a very efficient way to either run repetitive tasks that may differ only in the selection criteria or run tasks that need to be launched late at night when other users are off the system (e.g., data intensive tasks such as very large print runs, MRP, etc.). ATE can also be used to as part of your change management process to test the latest Epicor hotfixes using automated test scripts matched to your business activities and data. Users can easily re-validate results with ATE.

ATE was designed to make it simple to automate labor intensive processes. The tool has both a Recorder and a Player function. To automate a business process, users simply set the Recorder running and then perform routine data entry routine in Epicor ERP. The Recorder tracks mouse clicks and keystrokes to produce a script file. The Player can then be used to run the script file, effectively repeating the exact same data entry process. Sometimes, being able to automatically repeat a process at scheduled times is all that is needed. In other cases, the flow of the business process depends on external data, or on the results of calculations performed by Epicor ERP while the script is running. That is why the script language includes logic, such as loops and conditional statements, and data handling functions to support more complicated processes. Since ATE can read and write from external files, it can also be used for basic system integration. You also can combine ATE with Epicor Service Connect and send any XML file to an input channel to automate the integration with other systems. Together with Windows Scheduler you can run scripts and process XML messages at times when system load is low, e.g. at night or over the weekend.

Developed Specifically for ICE

ATE was developed specifically for the Epicor ICE Client Framework and requires less effort to produce scripts than generic automation tools.

Simple Installation

Hardware and software requirements are minimal compared to other automation tools. ATE can be installed on either an Epicor ERP server or client machine.

Multiple Processes at Once

Multiple automated processes can be run simultaneously from separate machines.

Epicor ERP Security Integration

Fully-integrated with Epicor ERP security; one ATE process consumes one Epicor office license.

Comparison Utility

Data and report comparison utility to facilitate consistency testing –backup files and reports created by ATE can be compared with backups to check for differences.

Flexible Script Language

Script language supports reading and writing data to external files (text and Excel), text and numeric variables, for…next loops, if…then…else statements, error handling, message boxes, taking screenshots, etc.

Service Connect Integration

ATE scripts may be integrated with Epicor Service Connect and send XML files to integration input channels so both back office and connectivity processes can be covered by ATE.

Software Validation

Used in highly regulated industries such as FDA regulated, ATE is used to simplify re-validation to enable users to more easily upgrade to latest releases.

Software Development Kit

For those requirements that cannot be satisfied by the embedded customization layers, Epicor also offers an advanced SDK which is available at an extra cost and supplies the client source, framework UI and business logic tools necessary to write your own additions and extensions to the application. The SDK is a toolset used to produce new application services using the Epicor ERP programming model.

Use the Tools Our Developers Use

Epicor ICE SDK is a packaging of some of the tools that are used by the Epicor development group in the creation of base code. These tools allow a developer to make modifications or extensions to the base application or create new software within the same framework used for the base product. The Epicor ICE SDK allows developers to build their own custom modules and integrate and embed them into the product as though it were part of the base system.

Audit Control

Within the Epicor ICE SDK users can make changes to underlying business processes via the Object Designer. This allows users to tailor the system to meet their needs while at the same time tracking these changes as they represent a functional change to the software application that might need to be tracked for governance and compliance auditing. This is a significant addition to the customization options within the application framework.

Epicor Service Connect

Epicor Service Connect is a powerful business integration platform, functioning as a central integration point for secure workflow orchestrations within Epicor applications as well as external connectivity to Epicor and non-Epicor applications. Because Epicor Solutions are built using Epicor the power of Service Connect can be used to streamline processing within the application framework.

Promote Lean Principles

Users can automate tasks and processes within the application to promote lean principles, continuous performance initiatives and Six Sigma quality within the organization or across the supply chain. Service Connect lets employees focus on value added activities and management by exception instead of repetitive data (re)entry tasks. Built to support collaborative processes, Service Connect links different business entities, applications or users using open, industry wide standards and technology that enables businesses to deploy solutions—confident that their investment will remain intact for the future. Service Connect harnesses the openness of XML and includes service-bus functionality for Security, Messaging, Orchestration, Transformation, Scheduling, Notification, and Exception Handling to deliver rock-solid reliability combined with ease of use.

Epicor Service Connect, a rapid platform for incorporating workflow and system orchestration through visual designers with little to no programming effort.

Much More Than a Programming Interface

Typically, the effort to connect different applications requires code for mapping the integration, proper error handling, scheduling, and so on. The aim of Epicor Service Connect is to eliminate this extra coding effort required to integrate an Epicor solution. Epicor Service Connect is more than a tool for integration; it is a platform for rapidly incorporating workflow and system orchestration through visual designers with little to no programming effort. Integrations can be easily built by using the Service Connect Visual Data Mapping tool to link and transform XML documents to map to different systems along multiple communication channels and protocols to support a wide range of integration scenarios.

Secure Audit Trail

Service Connect logs workflow processing for both transactional integrity and compliancy. Processes are available for review and tracking while in progress or after the process completes. If for any reason processes error or stop, transactions are rolled back and queued for subsequent correction and resubmit. Notification services can be incorporated into the workflow to alert either the submitting application (e.g., system integration or EDI process) or an administrator.

Direct Database Updates

Epicor Service Connect includes workflow support for Epicor business objects directly in addition to the existing web service elements. This feature can be used with the UpdateExt method to update full datasets and multiple records in the same way as the web service Update method processes data. Since the business objects are called directly and within a single login session much of the latency in web services can be eliminated.

Epicor Documentation and Content Delivery

With Epicor documentation and content delivery, content is shared with your employees in an easy manner that helps improve productivity and allows them to receive relevant information when they need it–right from within Epicor ERP.

Epicor University, the group at Epicor responsible for Epicor ERP learning, employs a worldwide team of dedicated content writers, instructors, and subject matter experts that develop a suite of content through a single-source technology and includes feature summary application help, technical reference guides, embedded courses, and user guides. Built on XML DITA technologies, the team pulls information from a unified .xml content library to create deliverables with consistent tone and structure.

User Guides

Epicor User Guides provide a complete overview of the major functions within Epicor. These printable documents offer full color explanations of system functions and walk users through the system, step-by-step. In addition to an Application User Guide, the available guides include the Epicor Implementation User Guide, ICE Tools User Guide, and the Service Connect User Guide.

Business Architecture

Feature Summary

Understand the impact of updates to every line of the business. Feature summaries provide comprehensive role based help that explains business cases of new features alongside impact topics for rapid adoption of new releases.

Application Help

Comprehensive application help is tied to each application function. A simple F1 hotkey offers users contextual access and speeds user adoption. In addition to functional help, each module is examined through a series of best practice workflows and "Working With" topics.

Intuitive Field Level Help

In addition to offering use of each field, Field Help is designed to help business analysts understand field use to make it easier to build custom queries and reports. As users click through the fields in the application, documentation including table.field naming for the specific field displays in the Field Help viewer.

Technical Reference Guides

Technical Reference Guides provide detailed, technical information about complex processes and features. Epicor offers technical reference guides on scheduling, MRP, costing, performance tuning, and financial posting engine.

Embedded Courses

Epicor ERP has over 100 embedded courses to give users the ability to explore the modules of the application through hands-on, self-paced learning. Epicor ERP embedded courses are delivered with a sample database and contextual links that launch directly into Epicor so users can apply learning faster. Courses are accessed via a separate course window that sits on top of Epicor ERP to offer users the ability to quickly reference learning while using the application.

Customizable Help and Courses

Sharing job knowledge helps organizations train new employees faster and maintain quality processes. Custom annotations enable employees to document processes so they can be referenced and shared. These annotations are flexible, use standard formatting rules, and can be created at either the user login or company level so they are unique to the business or unique to their role.

Epicor University

Epicor University learning is designed to speed employee adoption of Epicor ERP technology so that return on investment is realized in less time. To accomplish this, Epicor University offers training designed for each role in the organization. Epicor ERP documentation and content delivery provides a foundation for knowledge in Epicor ERP and gives already stretched employees the freedom to learn at their own pace.

Global Business Management

Whether through acquisition or organic growth, more and more companies are wrestling with the complexities of managing multiple business entities. Epicor Global Business Management helps to ensure that no matter how distributed your organization becomes you can maximize efficiency and drive business results.

Managing disparate business units offers unique challenges and opportunities with respect to centralized or distributed operational control, enterprise-wide visibility, inter-company supply chain management, and financial consolidation. To support the needs of today's increasingly distributed business, Epicor offers robust global business functionality within its design.

Alongside comprehensive multicompany functionality is end-to-end multisite management which provides companies with multiple facilities and flexible options when setting up operations. Some companies may prefer to run most business functions centralized within the same company but at multiple facilities, or they may run completely separate company entities with the ability to consolidate financial information at month or quarter-end. However you choose to define your business, Epicor supports transactional functions between systems and entities including inter-company transactions such as inter-company orders, transfer orders, and shipments between plants and warehouses. Epicor facilitates these scenarios within a single application that is flexible enough to grow with you as you expand your business. Epicor Global Business Management offers organizations the essential tools needed to create and maintain a single version of the truth.

Multicompany Management

Epicor Multicompany Management capabilities can assist your business in consolidating opera tions such as procurement and accounts payable as well as offer enhanced tools to improve operational visibility across companies.

Automation of inter-company financial transactions as well as financial recognition optimizes enterprise performance to shorten lead times on key product lines. Additionally, from a financial perspective, multicompany organizations may choose to not only report as individual entities but also consolidate multiple currencies and report across business entities to a single consolidation company.

Underpinning this functionality is a complete technology framework to support global enterprises that is scalable, offers choice in deployment, and includes a set of productivity enhancing tools designed for global business operations.

Multicompany Menu
Define all companies within the organization and user security and access rights by function for each. Moving between companies becomes as simple as selecting the company and function from the left hand menu hierarchy. In this manner a user can switch between order entry in one company to any number of other companies by selecting that option on the menu. This can significantly increase user productivity by removing the need to log in and out of different companies.

Global Customers, Parts, and Suppliers
Define global customers, parts and suppliers. Defining Global records that can be transferred between companies and maintained either globally or locally based on a set of user-defined rules and mappings, automatically ensuring that new and changed records are sent to all companies within your enterprise.

Credit Checking
Define each company with its own credit limit against a customer, then deploy as well a global credit limit for all companies conducting business with that global customer, thereby facilitating a more comprehensive global credit management System.

Forecasts
Automatically send raw material forecasts to supplier companies that can be transported into a MRP Forecast.

Unique Accounts
Establish individual accounts, including inter-company elimination accounts, for each plant and company.

Global Business Management

Create user and role profiles across companies and move effortlessly between them using simple menu hierarchies.

Centralized Payment

Allows the flagging of suppliers as a Global Supplier that will be centrally paid and managed. Any AP invoice or debit that is created will be centrally paid and managed. The local invoice is posted to the supplier account, but flagged immediately as being fully settled by an inter-company transfer. A new 'corporate' single-line invoice is then created and subsequent management of the debt including payment is performed from a centralized location.

Consolidated Purchasing

As businesses strive to gain market share and remain competitive it becomes increasingly important to control procurement costs. Having the ability to combine requirements across locations not only gives your bussines the leverage to negotiate better pricing with suppliers but also consolidates purchasing resources.

Financial Consolidation

Set up multicompany consolidations between companies within or outside the Epicor database. Financial consolidations can even be done with companies on other external financial systems.

Multiple Currencies

Consolidate financials in any currency. Each company in the hierarchy has its own currency, and the top-level corporation may have a different currency not shared with any other company.

Global Supplier Price Agreements

Send agreements to companies by setting up global price agreements for raw materials to help ensure materials are purchased from the correct supplier at the appropriate global price.

Multicompany Journal Entry

Generate inter-company journals that automatically book expenses and/or accruals across companies for subsidiary and or parent companies.

Inter-Company Trading

Multicompany automates supply and demand transactions company-wide through standard purchase order and sales order functionality. To request replenishment from a supply company, generate a purchase order. The inter-company purchase order will automatically show up as an inter-company sales order suggestion linked to the supplying company. Complete financial recognition as well as shipment notification accompanies all inter-company trading, thereby automating the Accounts Payable process associated with Inter-Company Purchase Orders.

Inter-Company Eliminations

Map accounts between companies for smooth inter-company eliminations. With frequent mergers and acquisitions, the general ledger account structure corporate and subsidiary companies may not be the same.

Subcomponent Security

Authorize each user to only view information about specific companies to which they have access.

Virtual View

Build virtual views of the enterprise. For example, build a workbench or a dashboard that allows a user to see all orders for a customer across all companies even though those companies may exist on separate servers and databases. You can then open sales orders in separate companies from the same workbench.

Unlimited Hierarchy

Define parent-child relationships between companies in an unlimited hierarchy. Each organization can specify a parent company, which may also have another parent company.

Scalable Deployment

Deploy your companies on a single server/single database, or on multiple databases and multiple servers around the world. Many enterprises require their companies' data management systems to be geographically dispersed on different servers and different databases, to protect against communication glitches causing site downtime.

Epicor Global Business Management includes a robust messaging engine, which helps to ensure the successful transfer of information whether your companies are on a single database, multiple databases or multiple servers. This facilitates automatic transactions between internal and external companies around the world. Epicor is flexible enough to grow with you and removes the barriers to business success.

▶ Multiple companies within a single database

▶ Single server with multiple databases

▶ Multiple servers with single or multiple databases

▶ Communication across databases and servers in all directions

Multicurrency Management

Multicurrency Management automates the process of both buying, and selling in foreign currencies. With tracking of default currencies as well as extensive exchange rate tables, manual transactions are reduced. Lock transactions in at a specified rate with automatic gain or loss reporting, reducing the guesswork from handling foreign transactions. Throughout Epicor, the currency symbol is displayed notifying the user of the currency being used.
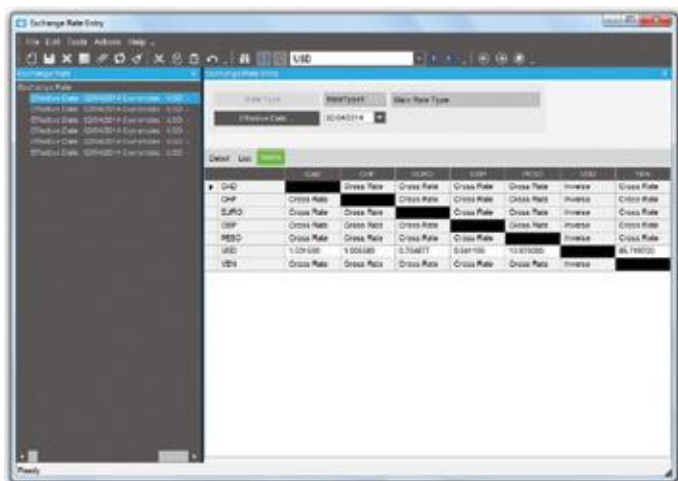
Automate the process of currency conversion, buying and selling.

Revaluation Options
In global business the use of multiple currencies requires companies to periodically revalue their transactions. Epicor applications provide users with the functionality to revalue transactions within the General Ledger, Accounts Receivable, Accounts Payable and Bank Accounts with the option to simply report in detail or summary, or report and post as a single reversing journal the value of the revaluation directly to the General Ledger.

Currency Tables
Optionally define multiple currency tables per company.

Exchange Rates
Update exchange rates as frequently as daily to support last-minute exchange rate changes.

Gain/Loss
Report on both realized and un-realized gains and losses.

Reporting
Conveniently convert reports to base currency so there is no need for recalculations when determining profitability or cash requirements.

Bank Accounts
Specify the currency used by the bank for each of your accounts.

Customer Price Lists
Assign a default currency to each price list when price lists are defined for various customers.

Quotations
Send quotations calculated in your prospect's or customer's base currency.

Customer Orders
Automatically default a customer's order to the customer's base currency, but also have the option to change it at any time.

Service Contracts
Designate the appropriate currency for each service contract.

Invoicing
Automatically default invoices to the customer's base currency, or change at any time.

Cash Receipts
Automatically convert cash received in the customer's currency back to base currency upon receipt.

Supplier Price Breaks
Support the supplier's currency structure with price break tables.

Purchase Orders
Automatically default supplier purchase orders to the supplier's base currency, or change at any time.
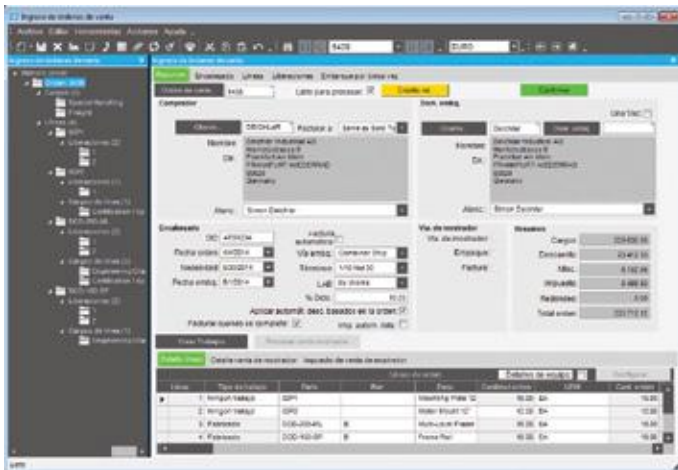
Accounts Payable
Print checks in the supplier's currency, with amounts automatically converted from the base currency.

Base Check Box
Throughout the application, you can automatically convert amounts to your company's currency by selecting the base check box. This check box is located at the top of many Financial Management forms.

Global Business Management

Global Multisite Management

Best-In-class enterprises are outpacing their competitors today with new initiatives to drive out redundancies in corporate operations. Maximizing the use of internal supply chain resources can be a key differentiator. Supply chains demand synchronization of production with distribution and logistics. This is most effectively accomplished with a single system providing visibility and consolidation of resources in multiple facilities. Companies may also prefer to run business functions centralized with separate production and distribution functions, or they may run them separately with the ability to consolidate financials at month- or quarter-end. Epicor supports both scenarios within one application. Multisite Management provides support for centralized accounting and purchasing, while allowing separation of production and distribution facilities.

Financial consolidation through Epicor Multicompany Management is only one way that Epicor Multisite Management helps businesses achieve their goals. For example, manufacturing and distribution organizations can leverage the planning and scheduling efficiencies with Epicor's robust multi-plant functionality. Not only are manufacturers and distributors looking for new tools to oversee multi-plant and warehouse operations, they are also looking to maximize the use of existing resources.

Sourcing by Plant
Define a unique source per part or plant—whether its default sourcing is purchased, produced or transferred. What is produced in one location may be purchased—or transferred in—from another.

Maintain plant information such as planning criteria and shared warehouses as well as establish criteria for plant transfers.

Production Plants
Gain visibility to separate each plant's resource groups, inventory levels and jobs.

Virtual Plant Support
Divide single sites with multiple production lines into multiple sites for virtual plants.

Shared Warehouses
Share one or more warehouses per plant to reflect the way each company conducts its business.

Costing Workbench—Cost by Plant
When developing costs through the costing workbench, companies are able to load alternate methods. These methods are plant specific and are used to develop plant specific costs. Hold average, standard, lot, FIFO, and last costs per part, per plant, ensuring the same costs apply to all plants.

Alternate BOMs and Routings per Plant
Define alternate BOMs and routings per part, per plant. When the same part is produced at multiple facilities, each plant can generate a BOM and execute a routing inclusive of their processes and configuration. You retain visibility and control, as plant-specific BOMs and routings are maintained as sub-revisions of the base revision.

Plant Scheduling Functions
View jobs for one plant or all plants, without sacrificing security. Provide control and flexibility to each production facility, which often has its own production planner and scheduler.

Subcomponent Security
Authorize each user to only view information about specific plants to which they have access.

Multilingual Data Management

Corporate growth and expansion inevitably leads to new markets and new geographies. Epicor Multilingual Management, alongside Epicor Global Configurable Engines facilitates this growth, with resources that can manage your business wherever you take it, or it takes you, with support for country-specific requirements around tax, currency and languages.

Translation Layer
Epicor Layered Client Framework eloquently separates the language of the business logic from the language of the end-user interface allowing you to operate your business seamlessly in any language.

For example, an organization that is headquartered in one country can deploy applications in the native language for that country. When a satellite office in another country needs to add users that require another language, the only difference for the user is the language. All corporate processes that the headquarters have deployed are unchanged and no local language customizations are required at either location.

Epicor is flexible in the deployment of languages in your enterprise applications across the various geographies in which you do business.

Master Data Management

As organizations grow, decentralize, or make acquisitions, the potential for multiple, inconsistent versions of the same data in different parts of the company can cause real problems with the quality, reconciliation and potential redundancy of data. The recent emphasis on regulatory compliance, the advent of SOA, and mergers and acquisitions has made the creation, stewardship and maintenance of accurate and complete master data a business imperative. Epicor Master Data Management (MDM) can help to ensure that your Multicompany and Multisite data meets regulatory requirements and also provides the consistency needed for real-time distributed operations, leading to greater customer satisfaction, operational efficiency, and business performance.
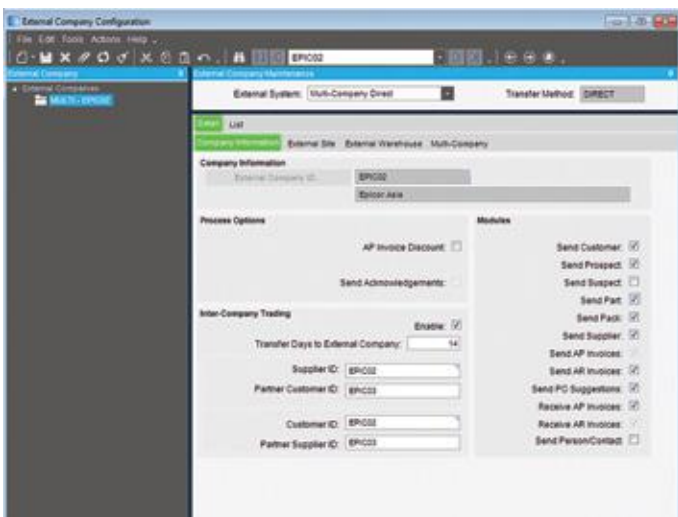
Facilitate automatic transactions between internal and external companies around the world and select which master data to publish right down to the field level of each table.

Extensible Markup Language

Epicor MDM works across a single database or multiple databases in different locales around the globe by utilizing an eXtensible Markup Language (XML) message-based infrastructure to facilitate the movement of disparate data into and out of the master data repository.

Transformation Engine

Epicor MDM includes a powerful transformation engine which provides the mapping capability to transform inbound data to the requisite master data definition and to map data definitions retrieved from the master data repository to XML for output. Based on a set of user-defined rules and mappings, diverse global entities may now have records transferred and maintained between companies with the assurance that new and changed records are sent to all companies within your enterprise.

Global and Local

At the same time, local customers, parts, suppliers, etc. in each company remain autonomous between your companies. This is vital so that each company can maintain its own business function without being restricted to working only with global customers or suppliers. This also allows each company to produce/sell their own product line by having localized part values that are specific to each company.

Data Hierarchies

In addition to master data itself, Epicor MDM allows you to maintain data hierarchies—for example, bill of materials for products, sales territory structures, national accounts structures for customers, and so forth. Epicor MDM captures these hierarchies and also allows you to modify the hierarchies independently of the underlying systems. Epicor MDM manages hierarchies so that a change to the hierarchy in a single place can propagate the change to all the underlying systems.

Field Level Management

At the same time, Epicor MDM provides total control over which fields are managed by the master data publisher and which fields the subscribers can change and offers enterprise views and a complete menu system to allow you to view all entities from single login. This means you are able to simultaneously view the customer, inventory, part or any other records that are part of the master data repository that are located in different companies.

Epicor Service Connect

Today's business world is a connected world and integration and automation is everywhere—linking sales staff on the road, warehouse staff in the bays, engineers on the shop floor, customers and suppliers together in a seamless web of commerce and connecting your distributed organization around the world.
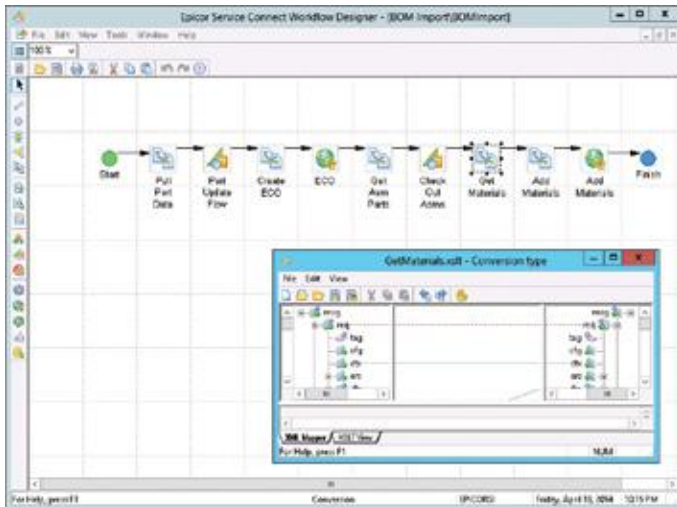
Epicor Service Connect is a business integration platform, functioning as a central integration point for secure workflow orchestrations.

Epicor Service Connect is a business integration platform that functions as a central integration point for secure workflow orchestrations within Epicor applications as well as external connectivity to Epicor and non-Epicor applications. Users can automate tasks and processes within the application to promote lean principles, continuous performance initiatives and Six Sigma quality within the organization or across the supply chain. Service Connect lets employees focus on value added activities and management by exception instead of repetitive data (re) entry tasks. Built to support collaborative processes, Service Connect links different business entities, applications or users using open, industry wide standards and technology that enables businesses to deploy solutions—confident that their investment will remain intact for the future. Service Connect harnesses the openness of XML and includes service-bus functionality for Security, Messaging, Orchestration, Transformation, Scheduling, Notification, and Exception Handling to deliver rock-solid reliability combined with ease of use.

Much More Than a Programming Interface

Programming interfaces and system integration has typically been a complex and difficult task. Even if applications have a published application programming interface (API), the effort to connect both applications still requires code for mapping the integration, proper error handling, scheduling, and so on. In other words, an API is only the start of a long integration process. The aim of Service Connect is to eliminate this extra coding effort required to integrate an Epicor solution.

Service Connect is more than a tool for integration; it is a rapid platform for incorporating workflow and system orchestration through visual designers with little to no programming effort. Service Connect uses XML documents to provide simple web service connectivity to Epicor solutions and other applications that support XML standards. Integration can be easily built by using the Service Connect Visual Data Mapping tool to link and transform XML documents to map to different systems along multiple communication channels and protocols to support a wide range of integration scenarios.

Service Connect logs workflow processing for both transactional integrity and compliancy. Processes are available for review and tracking while in progress or after the process completes. If for any reason processes error or stop, transactions are rolled back and queued for subsequent correction and resubmit. Notification services can be incorporated into the workflow to alert either the submitting application (e.g., system integration or EDI process) or an administrator.

Added Value for a Service-Oriented Architecture Foundation

Epicor enables workflow orchestrations within Service Connect to streamline processing within the application framework. Business components, represented as web services outside of the application, can be recomposed within Service Connect to eliminate non-value added steps or potentially speed up any process.

Exploiting the Value of Epicor SOA

Because Epicor solutions are built using Epicor SOA, the power of Service Connect can be used to streamline processing within the application framework. Business components, represented as web services outside of the application, can be recomposed within Service Connect to eliminate non-value added steps or potentially speed up any process. For example, processing sales orders typically involves multiple availability inquiries, reviews, inventory release decisions, etc. Orchestrating this process within the Service Connect Workflow Designer can eliminate many of these steps by routing processes to automated tasks, such as order-submit-direct-to-pick for specific inventory items or order fulfillment for your best customers. Other examples include: PLM integration without entering change orders within a process workbench in the application; processing of e-mail attachments for automatic data input; and corporate governance best practices using task assignments with digital signatures.
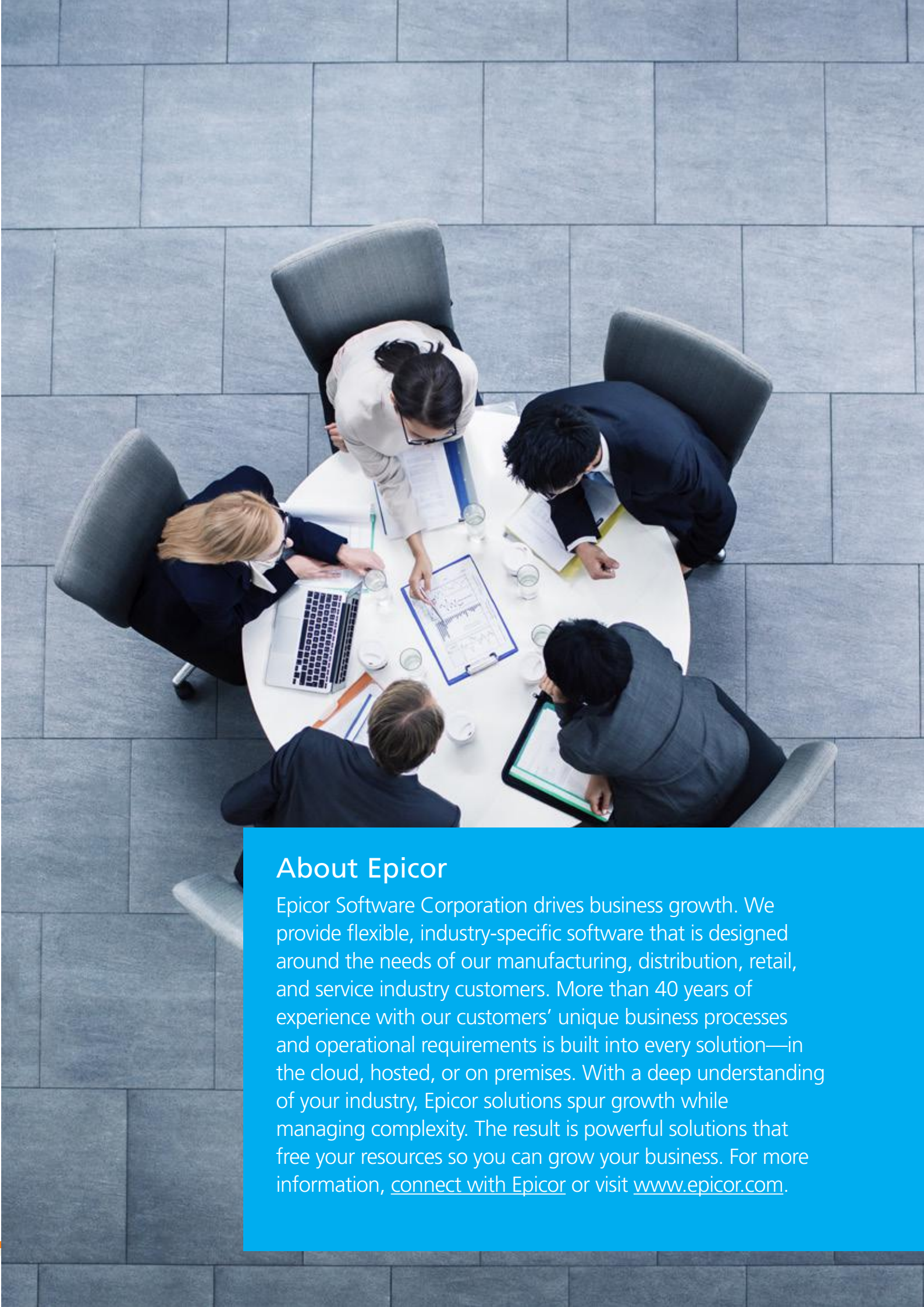
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About Epicor

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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