Epicor® Enterprise Resource Planning

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EPICOR.

Business Inspired®

Epicor—Innovation that Inspires

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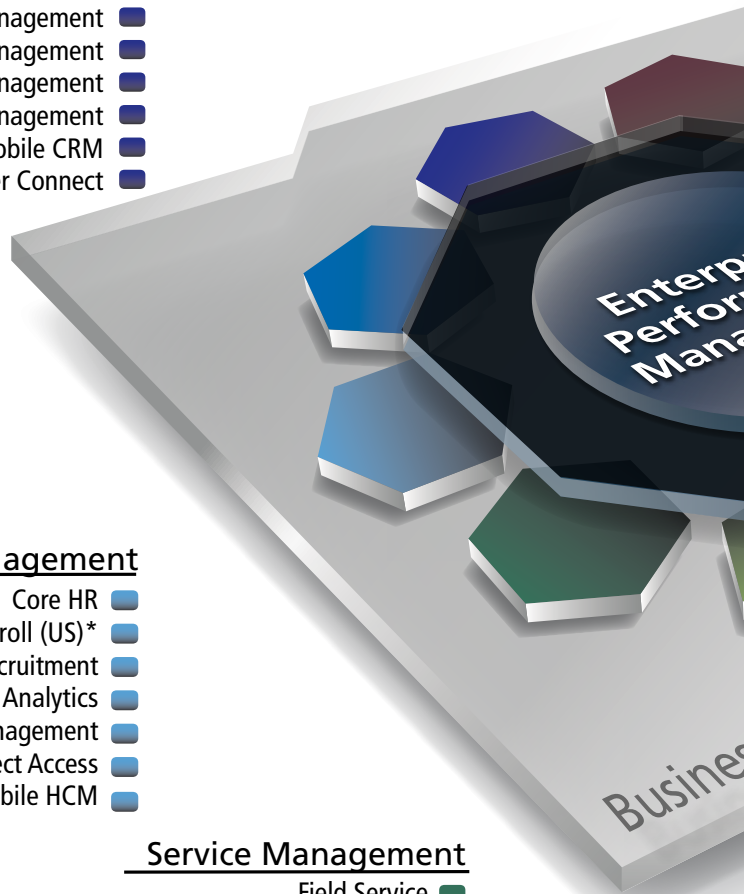
*Available in the US only - please check with your Epicor office for local solutions.

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Customer Relationship
Management

- Contact Management
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- Marketing Management
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- Lead and Opportunity Management
- Case Management
- Mobile CRM
- Mobile Sales Assistant

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 provides 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) further enhances Epicor CRM, 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 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.
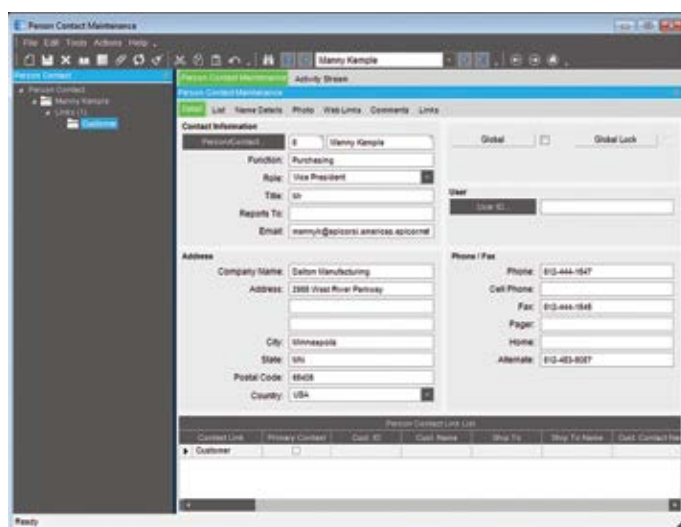
Manage every aspect of your relationships with contacts for a more complete picture of customer interactions and for enhanced customer satisfaction.

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

Targeting your customers with the right programs and messages and retaining those customers can be your most powerful competitive weapon in today's challenging business world. 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. And, once you have the lead, Epicor CRM helps you manage the entire sales process more effectively, with features such as workflow and forecasting.

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. Its user-friendly experience enables you to quickly and easily implement focused communications and campaigns with minimal training.

Lead and Opportunity Management

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 lead and opportunity management tools your sales team needs to manage the complete prospect-to-customer lifecycle, give accurate revenue forecasts to management, and automate many administrative tasks. Lead and Opportunity Management with Epicor Information Worker also enhances the effectiveness of your sales force by synchronizing essential Epicor CRM data with Microsoft® Office, giving your sales force full access to prospect and customer information, including sales history within Microsoft Outlook®, Microsoft Excel®, or Microsoft Word.

Meet your customers where they are; impacting change as it happens to ensure customer loyalty.
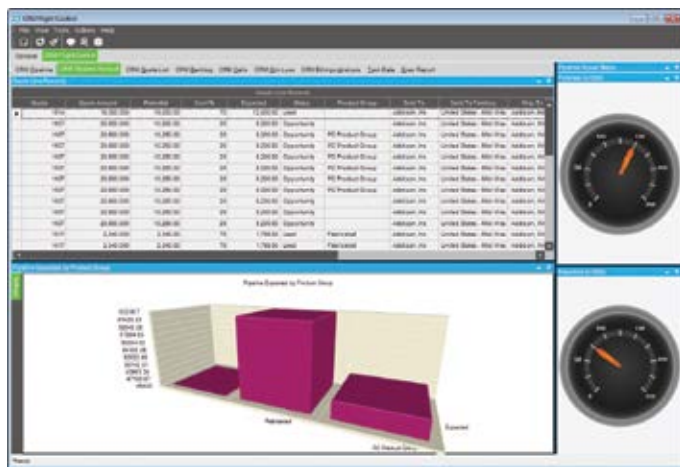
Easily manage leads and opportunities for accurate sales forecasting and pipeline analysis.

Case Management

Improving the productivity and responsiveness of your support center is an essential component of building industry leading customer satisfaction. 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 comes equipped with time saving links to customer-focused activities (e.g., new quotes, orders, RMA requests, or service calls), plus a search-driven knowledgebase and case-driven workflow for standardizing case resolution. In addition, Case Management is fully integrated with Epicor Service Management's Field Service module for easy access to dispatching field activities, online answer books, existing customer field service calls, warranty information, and service contracts.

Mobile CRM

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.

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.

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

Sales
Management

- Estimate and Quote Management
- Order Management
- Demand Management
- Electronic Data Interchange (EDI)
- Point of Sale
- Commerce Connect
- Customer Connect
- Supplier Connect

Epicor Sales Management delivers a comprehensive suite that enables you to produce accurate estimates, streamline your order-to-cash cycle, and fulfill perfect orders that ensure world-class customer satisfaction. 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. Get quotations out more quickly and be more accurate with pricing and lead times with a wide range of powerful tools including:
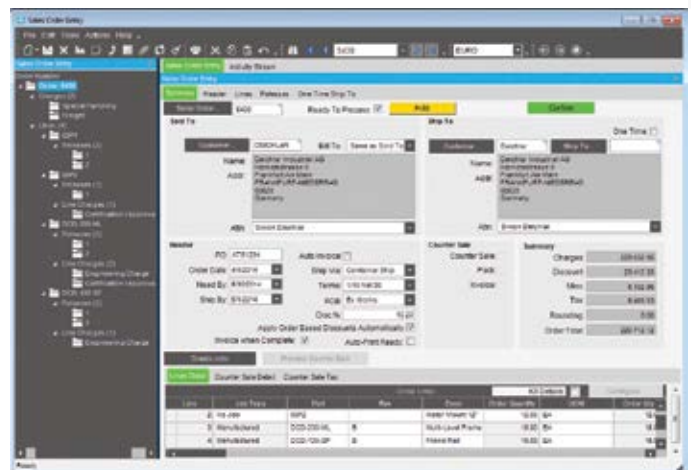
- Estimating
- Standard Routings
- Pipeline Management
- Drag-And-Drop Interface
- Realistic Cost Estimates
- Inventory Availability
- Request Supplier RFQ
- Markups
- Order/Job Integration
- Part Advisor
- Prospects
- Quote Tracker
- Competitive Analysis
- Workflow
- Part Cross-Reference
- Social Estimating

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. Built-in order management functionality includes:

- Blanket Orders
- Credit Checks
- Multiple Ship-to Addresses
- Alternate Bill-to and
- Sold-to Customers
- Ship from multiple locations
- One-Time Shipments
- Fulfillment and Allocation
- Processing
- Fulfillment Queue
- Management
- Put Transaction Type
- Pick Transaction Type
- Fulfillment Queue Tracker
- Drop Ship and Buy to Order
- Cross-Docking
- Sales Kits

- Configure Sales Kit Components
- Configure a Kit within a Kit
- Backorders
- Sales Commission
- Price Lists
- Up-Sell, Cross-Sell, and Down-Sell
- Order-Based Discounts
- Miscellaneous Charges
- Order Tracking/Monitoring

- Copy Order and Build
- Order
- Capable-To-Promise
- Multilevel Capable-To-Promise
- Available-To-Promise
- Order Job Wizard
- Project Management
- Counter Sales
- Tax Calculations
- Credit Card Processing

Manage sophisticated sales requirements from the time an order is entered until final shipment.

EDI/Demand Management

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. 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. EDI/Demand Management capabilities include:

- Demand Contracts
- Demand Entry Management Console
- Demand Tolerances
- Demand Mass Review
- Schedules and Schedule Review
- Cumulative Quantities (CUMs)
- Forecasts
- Periodicity (Interval Setup)
- Capable-to-Promise
- Support for Allowance and Charge Codes
- Automated Order Match Validation
- Close and Process Schedules

- Contract Start and End
- TIE Kinetix® Software
- EDI Implementation Options
- EDI Managed Services
- Direct Import Demand Workbench
- Acceptance Status
- Evaluated Receipt Settlement (ERS) or Pay on Receipt (POR)
- EDI Capable to Promise
- Configuration Details
- Service Connect with .NET References for custom EDI Processing

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)

Point of Sale

Epicor Point of Sale (POS) extends the power of your Epicor ERP solution to a customer-facing sales environment, whether you're an organization with a single POS station to a large, multinational chain with hundreds of stores. Epicor POS provides a feature-rich store system that empowers store personnel to provide an enhanced customer experience. Comprehensive functionality includes 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.
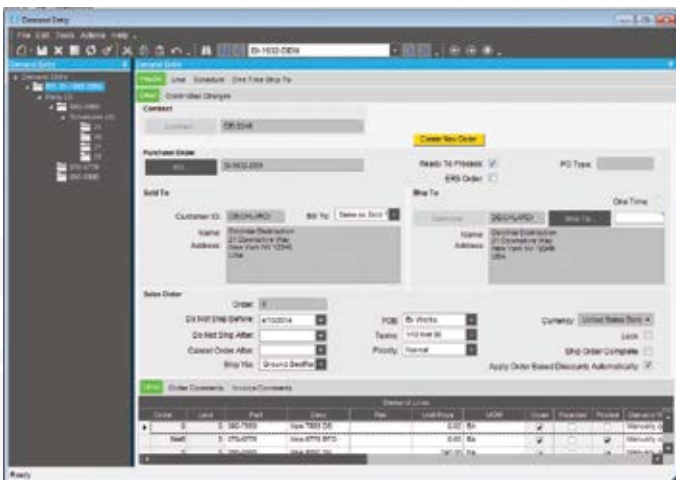
Manage one inbound purchase order at a time, or options can be turned for more automated entry into the Epicor ERP system.
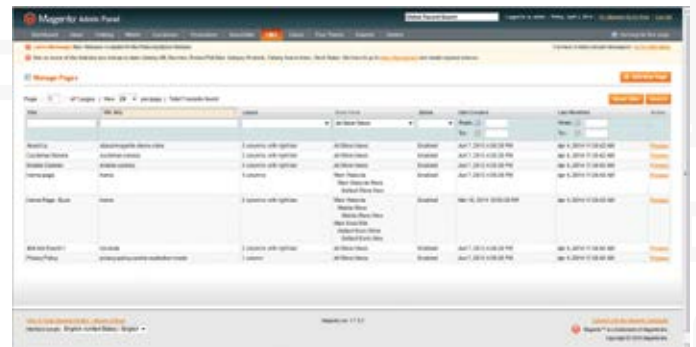
Commerce Connect

Epicor Commerce Connect (ECC) extends business boundaries with a proven commerce architecture that connects your business to consumers, customers, and channel; including supply chain. ECC is able to help you utilize your website to drive revenue, increase customer satisfaction, and grow your business. Natively integrated with your Epicor ERP solution, ECC reduces the time to setup a customized, attractive and simple to use website. While many companies can provide eCommerce services, very few are able to deliver the value and rapid results the way that ECC can.

On premise or hosted, the choice is yours

Epicor Commerce has a variety of deployment options that are sure to fit your specific needs. Epicor Commerce was designed with flexibility of deployment in mind so that it can be hosted in the location of your choice. In addition to direct hosting services, Epicor has a SaaS offering for Epicor Commerce. Commerce Connect capabilities include:

- Search Engine Friendly
- Customer and Supplier Specific Pricing
- Promotional Tools
- Product Suggestions Tools
- Ratings & Reviews
- Multiple Payment Options
- Multiple Shipping Options
- Estimated or Actual Freight Rating
- Order Management
- Advanced Reporting and Analysis
- Advanced Search Capabilities
- Configurable Themes

- Unlimited Products & Categories
- Product, Customer and Price Synchronization
- PayPal™ Payflow Pro Credit Card Merchant Account/Gateway Integration
- Tax Calculations
- Global Commerce
- Commerce Web Service Connector
- Estimated or Actual Freight
- Simplified Administration
- Online Configurations

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

Supplier Connect

Supplier Connect 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.

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.

Customer 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.
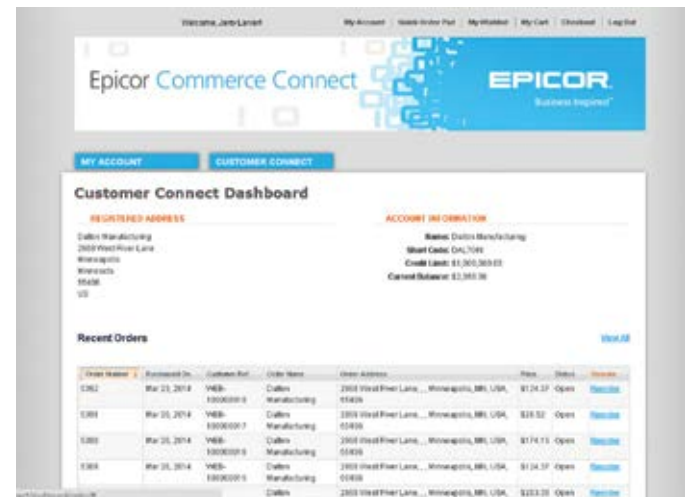
Always a click away, Customer Connect gives B2B customers access to account-specific information directly from your Web site. Whether ordering a replacement part, checking on the status of a shipment, or payment history, Customer Connect extends your level of service to customers.

Human Capital
Management

Epicor HCM automates 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.

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.
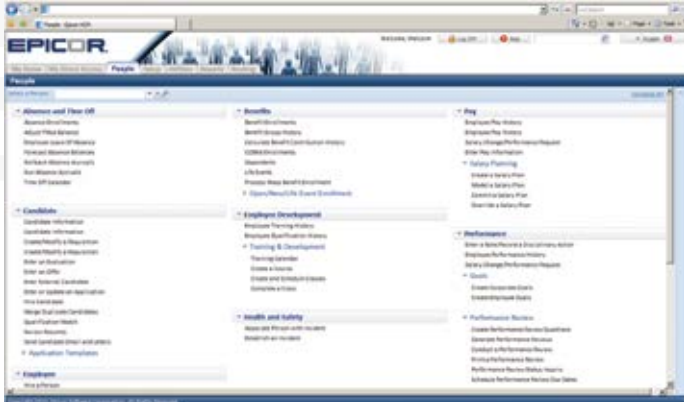
Epicor HCM offers end-to-end HR functionality with an interface that maintains all employee-related data in one area, provides strategic level reporting, and captures the full cycle of information on every resource in your organization.

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.

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. Recruitment Management capabilities include:

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

Use Qualification Match to quickly identify potential candidates for open positions.

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. Key features include:

- 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 capabilities include:

- 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 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. Compensation capabilities include:

- 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.
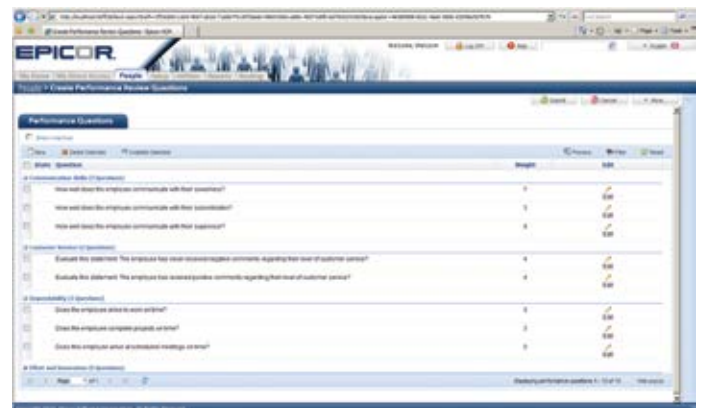

Reduce the cost of tedious paper-based reviews with a 360-degree view of performance that encourages consistent monitoring and aligns corporate objectives with the goals of each department and individual.

Reporting and Analytics

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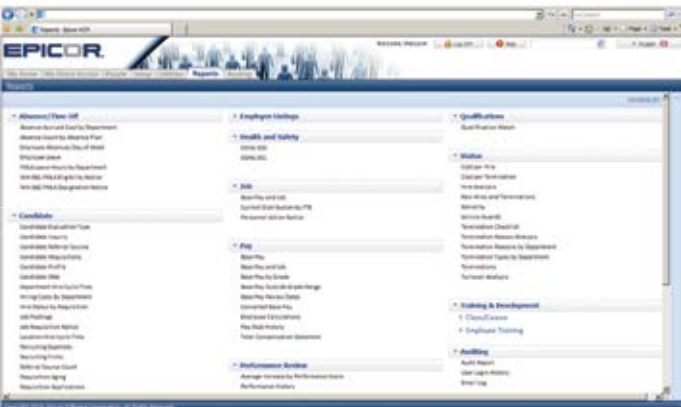
Epicor HCM includes over 250 pre-built reports that follow the permission and security structure within the application so users are empowered with important analytical tools and ease of use.

Training and Development

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

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. The Epicor HCM Mobile Connect allows both Managers and Employees access to frequently used self-service tasks from their mobile device.

*Employees stay connected with HCM Mobile Connect.*

Service
Management

Epicor Service Management optimizes 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 ensures the timely and accurate execution of service contracts, including the ability to generate service-level agreements with automatic billing options. Service contracts can be established for specific products, customers, and service-level agreements, each with an expiration date that is automatically tracked for easy manual look-up. The Service Call Center Workbench allows you to add or update service orders, schedule services, execute purchase and material planning, and manage warranty and service contracts.
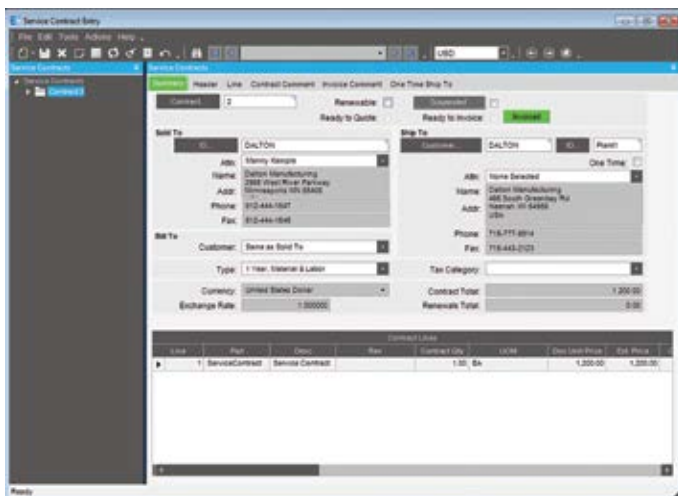
Give customers fast and effective service with access to detailed information about service contracts and warranties.

Field Service

Epicor Field Service is designed for those 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, with support for drop shipment of service parts directly to the customer site. Field Service capabilities include:

- Field-Based Inventory Allocations
- Service Call Center Workbench
- Labor & Material Charges
- Time & Material Billing
- Tracking Service Inventory
- Inventory/Warranty Returns
- Cost-of-Service Reports
- Automated Dispatching

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.
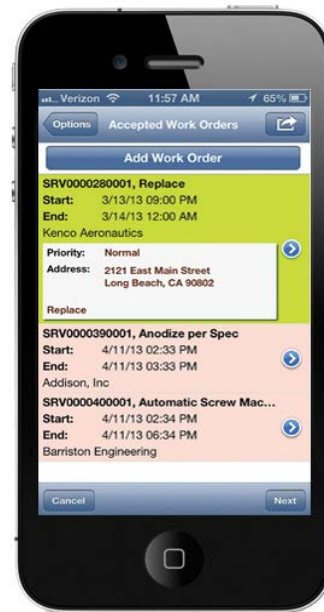
Mobile Field Service provides "in the field" access to enterprise information for improved service.

Case Management

Fully integrated with Field Service, Epicor Case Management lets you easily access dispatching field activities and provide field service representatives access to online knowledgebases, existing customer field service calls, warranty information, and service contracts. Comprehensive contact management, communication, and traceability capabilities allow you to efficiently manage and record all customer interactions across the enterprise, manage and document communications between customer service or field service, as well as link documents and communication events, such as e-mails and calls, for increased customer satisfaction.
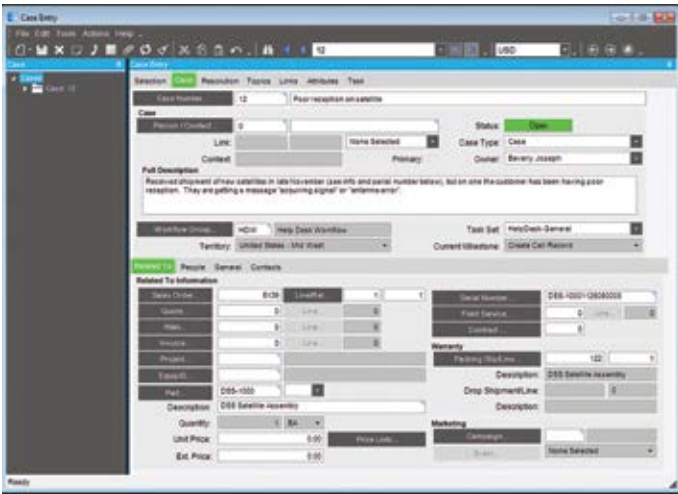
Shorten service response time by collecting detailed product problem information and using the integrated features to initiate requests to the appropriate resource.

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 a 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). RMA functionality includes:

- Automatic RMA Number Generation
- Non-Nettable Bins
- RMA Disposition Tracking
- Automatic Credit Request
- Serialized Part Return Tracking
- Detailed Notes
- User-Defined RMA Codes
- Cost-of-Returns Management
- QA Tracking
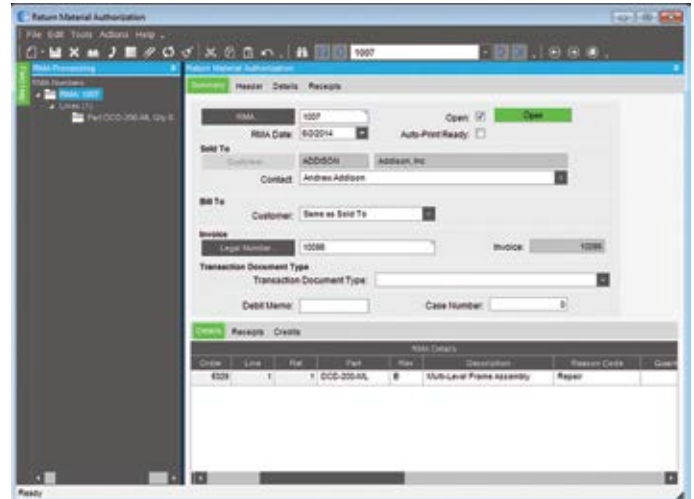
Initiate and track RMAs for customer returns and track reasons for rejected items.

Maintenance Management

Epicor Maintenance Management provides companies with a comprehensive toolset for production and facilities equipment maintenance that is critical for running their business. Facilities and production equipment can be scheduled for maintenance based on a pre-defined service interval, on usage, time, or via manual requests. Once a preventative or regular maintenance work order is established, the maintenance planner can schedule equipment down time, and trade resources and materials as needed. When maintenance has been performed on equipment, the operators can record their hours, materials used, and closing remarks. Maintenance Management functionality includes:

- Equipment Maintenance Tracking

- Parent/Child Equipment Tracking

- Automatic Maintenance Work Order Generation

- Maintenance Request Management

- Maintenance Request Queue Monitoring

- Preventative Maintenance Set-Up

- Scheduled Maintenance Planning

- Special Tools Tracking

- Issue & Resolution Tracking

- Warranty Tracking

- Equipment Maintenance Tracking

- Work Order Request Tracking

- Maintenance Work Order Tracking

- Gauge Calibration Plans

- Repair History Tracking

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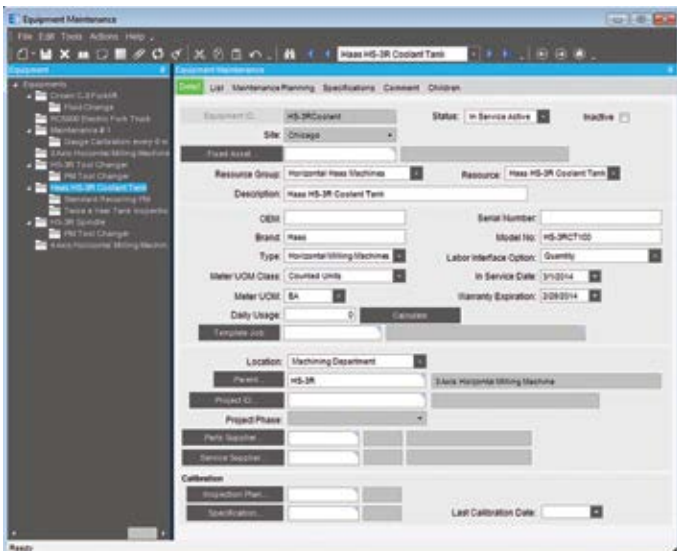
Maintenance technicians record events and resolution at the point of work.

Product Data
Management

- Bill of Materials (BOM)
- Routings
- Engineering Change and Revision Control
- Product Lifecycle Management
- Product Costing
- Product Configuration

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 PDM provides a complete end-to-end solution to manage all aspects of a product's lifecycle, enabling enterprises to control the enormous number of electronic documents produced.

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. Bill of Materials functionality includes:

- Centralized Product BOM Management
- Drag-And-Drop Interface
- Visual BOM Display
- "Get Detail" Functionality
- Predefine Alternate BOM's
- Expansive Part Number
- Reference Designators Of BOM's

- Document Linking
- Cost Replacement Rollup
- Requirements Reporting
- Critical Path View
- Phantom Structures Flexibility

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.

Comprehensive Routings functionality includes:

- Centralized Product BOM Management
- Easy-to-Use Interface
- Expedited Engineering
- Alternate Routings
- Flexible Production Standards
- Dimensional Planning
- Daily Capacity Planning
- Resource Planning
- Plan as Assembly
- Capability Planning
- Default Operation Standards

- Multi-Place Decimal Precision
- Production & Setup Cost Analysis
- Fixed and Variable Burden Assignment
- Subcontracting Services Planning
- Online Routings
- Drag-and-Drop Management
- Microsoft SharePoint® Repository

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.
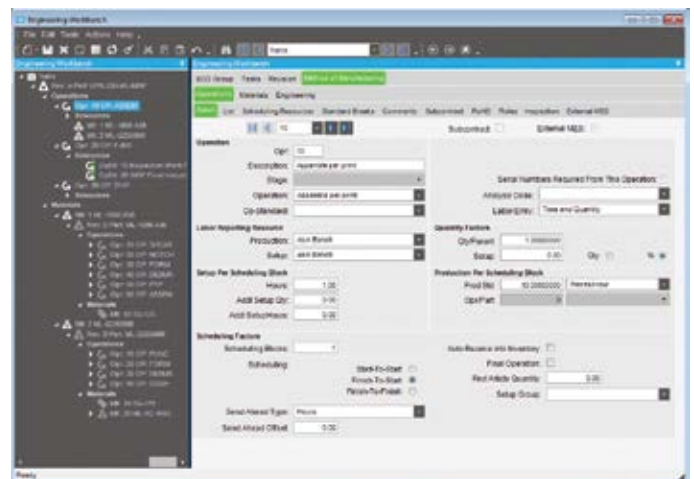
Build a visual view of a routing for a new part using the integration to other engineering information and the drag-and-drop interface

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 Change and Revision Control functionality includes:

- Engineering Workbench
- Engineering Approval
- Multiple Revision Capabilities
- Revision Effectivity Management
- Powerful Search
- Complete Revision Tracking
- Dynamic Revision Compare

- Automatic Engineering Workflow
- Complete Product/Assembly Visibility
- Mass Replace/Delete
- Express Check-Out
- CADlink for Epicor

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.
Functionality includes:

- Secure Electronic Vault
- Document Security
- Check-In/Check-Out
- Search Capabilities
- Document Preview
- Comprehensive Document Relationship Management
- Engineering change order (ECO) processes
- Historical Change Detail Log
- CAD Integration
- Sub-Document Management

- Project-oriented functions
- BOM Push From CAD
- Automatic Title Block Update
- Revision Management
- Automatic BOM Generation
- Drawing Copies Generation
- Multi-CAD System Support
- E-mail System Integration
- Microsoft Office Integration

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. Product Costing functionality includes:

- Elements of Product Cost
- Costing Workbench
- Multiple Cost Set Grouping
- Multiple and What-If Cost Sets
- Part Cost-per-Plant Setup

- Cost Load
- Cost Rollup
- Alternate Routing Methods Option
- Cost Rollup Group Report
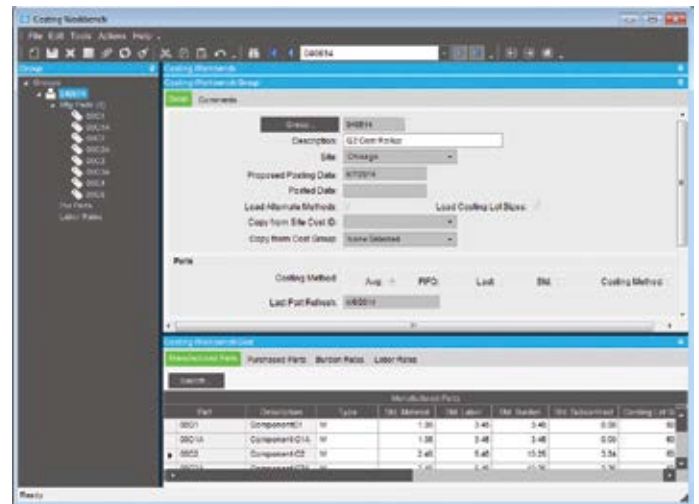
Maintain and view costing by part type and cost type, and access this information throughout the system.

Product Configuration

Product Configuration enables on-the-fly configuration of highly customizable and dimensional products via a straightforward question and answer evaluation. It is Web enabled, and is also available to users employing Commerce Connect. This simple-to-use module gives you the ability to formalize all configurations prior to circulation and approval, and includes detailed audit trail logs noting ID and approval date. In addition, you can tie a configuration to a BOM structure containing multiple options, each with its own set of rules, plus optimally create unique configurations and rules for each revision. Configuration responses are stored with other product information for historical auditing and accuracy. Other Product Configuration functionality includes:

- Component-Level Price Lists
- Configurator Rules Copy/Paste
- Custom Screen Input Builder
- Dynamic List Creator
- Generic Part/Multiple Rules
- Global Configurator Variables
- Import/Export Configurations
- Configuration-Based Price Calculation
- Features/Options Designation
- Custom Rule Expression Builder

- Add Comments to Rules
- Keep When Rules
- MRP Inclusion
- Ensure Rule Accuracy
- Smart Part Number Builder
- Part Number Creator
- Capable to promise configurations
- Web-enabled configurations
- Configured Parts Within Configured Parts
- Maintain and view costing by part type and cost type, and access this information
- Multilevel Configured Parts
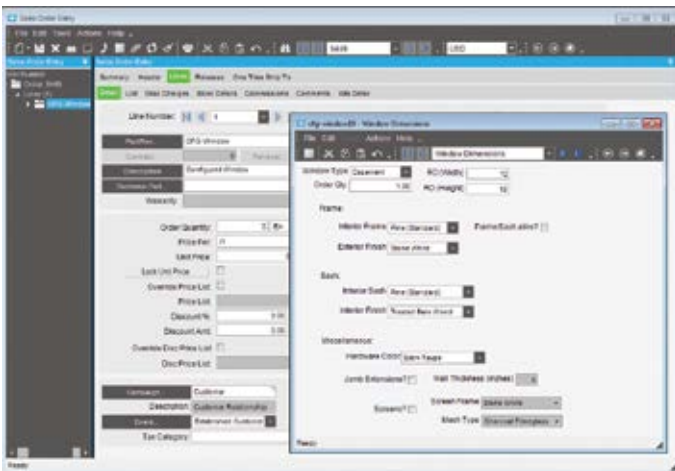
Build complex and flexible configuration models with attractive interfaces to customers.

Planning and **Scheduling**

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

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.

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). Forecasting & Master Production Scheduling functionality includes:

- Manual Forecast Entry
- Forecast Import/Export
- Multiple Forecast Methods
- Forecast Buckets
- Multi-Variable Forecast Analysis
- Intercompany Trading
- MPS Entry
- Automatic MPS Generation
- Driving Capacity & Raw Material Procurement

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. Forecast Pro for Epicor functionality includes:

- Expert Selection Mode
- Multiple Statistical Forecasting Method Support
- Easily Adjustable Forecasts
- On-the-Fly Hierarchy Management
- Flexible Exception Reporting
- Forecasting Performance Monitoring
- Consolidated Team Forecasts
- Forecast Pro for Epicor Collaborator
- Work With Your Existing Epicor Data

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

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, from forecasting to MRP generation, and more. Material Requirements Planning functionality includes:


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

- General/Specific
  Part Forecasts
- Manual Forecast
- Forecast Import/Export
- Master Production Schedule
- MRP Generation
- Log File
- Material Planning
- Dynamic Lead Times
- Part-Planning Tools
- Plan as Assembly
- Planning Horizon
- Auto Job Firm Process
- Multisite MRP Management

- Multilevel Pegging
- Sourcing by Plant
- Available-to-Promise
- Multiple Planning Types
- Rough Cut Horizon
- Recycle Jobs
- Short Horizon
  Days of Supply
- Short Horizon Planning
- Calculate Manufacturing
  Lead Time
- Start Minimum Quantity
- Bill of Materials

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. Scheduling & Resource Management functionality includes:

- Production Scheduling Board
- Alerts
- Finite Scheduling Capability
- Customizable Start Time
- Drag-and-Drop Scheduling
- Operation Complete
  Quantity Displayed
- Operation Complete
  Time Displayed
- Overload Informer
- Multilevel Assemblies
- Job Scheduling
  What-If Mode
- Setup Grouping
- Capabilities with Zero Priority
- Change Impact

- Dual Resource Constraints
- Conditional
  Forward Schedule
- Resource Group
- Finite Load Horizon
- Resource-Based Schedule
- Reschedule Delta
- Rough Cut Scheduling
- Scheduling Factor
  Send Ahead
- Scheduling Blocks
- Global Scheduling
  Component Process
- Material Constraints
  Displayed
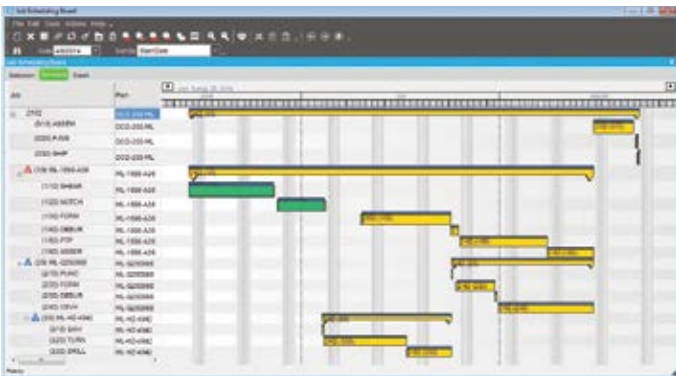
Manipulate the schedule directly from a sophisticated, drag-and-drop visual scheduling board.

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
- Multiple Resource
  Scheduling Board
- Multiple Constraints
- Resource Eligibility
- Automated Scheduling
  by Capability
- Dependent Capabilities
- Finite or Infinite Capacity
- Minimum WIP Scheduling
- Dimensional Planning

- Rate-Based Scheduling
- Material Constraints
- Advanced Material Planning
- Change Impact Analysis
- Time Adjustment
- Optimization Rules
- Balanced Optimization
- Single Cell Scheduling
- Unlimited What-If
- Multi-Plant Communication
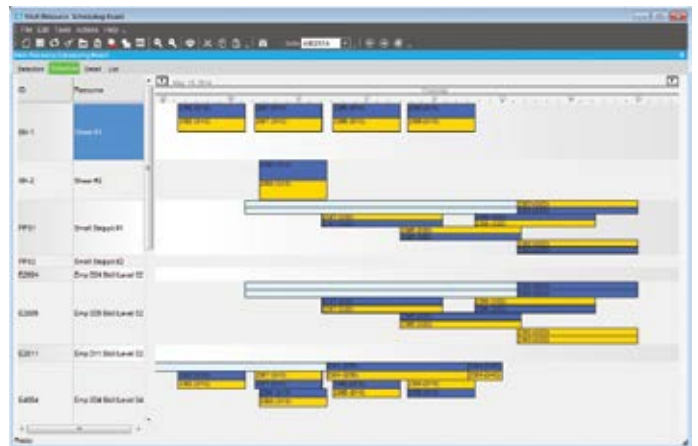
Consider production resources and create a visual finite schedule for improved schedule accuracy.

Multisite Management

Not only are manufacturers and distributors looking for new tools to oversee multiplant operations, but they're 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.
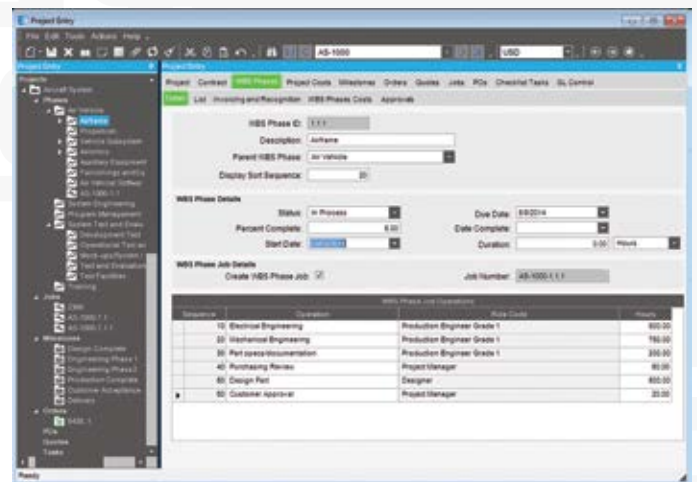
Project
Management

- Project Planning and Analysis
- Project Billing
- Resource Management
- Time Management
- Mobile Time Management
- Expense Management
- Mobile Expense Management

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 ensure projects accurately reflect true costs and the comprehensive Billing and Revenue Recognition functionality guarantee compliance with contract requirements and accounting standards.

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. The Project Planning module also includes the ability to accumulate and roll up costs for a WBS Phase to the main project, supporting budgets, estimated completion values, and calculated, estimated, and actual costs accumulated at the WBS Phase or project level. For complete visibility, all costs are rolled up through the project structure, with added analysis capabilities offering cross-project scrutiny of material class, burden, or labor type. Project Planning functionality includes:

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.

- Project Generation
- Definable Project WBS Phases
- Microsoft Project Integration
- Template Projects
- Milestones
- Checklist Tasks
- Project Schedule
- Project Budgets
- Project Attachments

- Business Process Management
- Responsive Visibility
- Project Analysis
- Advanced Project Analysis
- Cost Analysis
- Revenue Analysis
- Revenue Recognition Workbench
- Invoicing
- Advanced Project Analysis

Social Project Management

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. 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, including comprehensive contract management, multiple invoicing methods, time and materials billing, milestone billing, and more. Project Billing functionality also includes:

- Detailed Contract & Project Variations
- Customer Shipment
- Cost Plus Invoicing
- Fixed Fee Management
- Progress Payments Invoicing
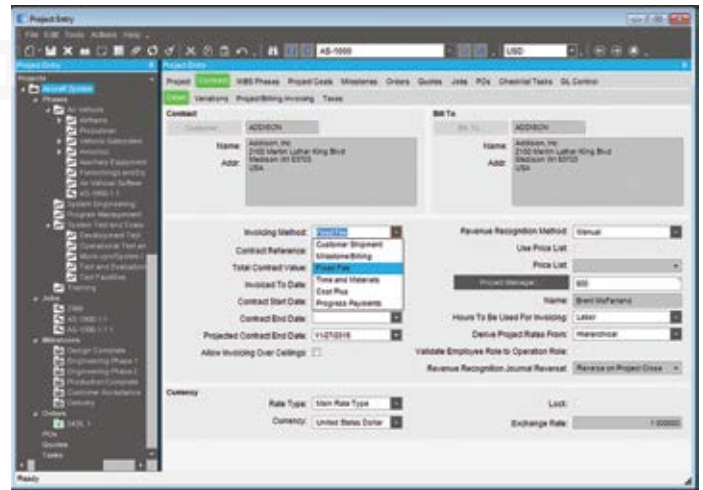
Comprehensive contract management provides a range of invoicing options to cater for any billing situation.
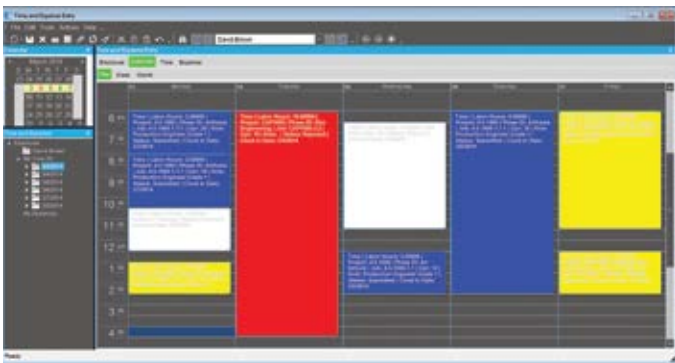
Resource Management

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 contact.

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 shopfloor, or in the office, resulting in quick and accurate recording. Time recording reliability is reinforced through an array of taskcentric entry options, which focus on the critical data required in each context. Additional configuration options ensure that users only have access to authorized jobs and booking codes, with a clear separation between direct and indirect labor entry. Additionally, the flexible approvals process provides the security to ensure that transactions are properly authorized and backed up by a comprehensive audit trail. Time Management functionality includes:

- Access from Calendar
- Direct Labor Entry
- Labor Entry Using MES
- Daily Time Entry
- Timesheet List
- Indirect Time
- Quick Codes
- Detail-based Comments
- Secure Configuration
- Contextual Approvals
- Advanced Workflow
- Approvals Queue
- Business Process Management
- Proxy Users
- Reporting and Analysis
- Audit Trail

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

Mobile Time Management

Mobile Time Management allows resources to enter time to projects and jobs at the point they occur, out in the field. Reducing the need to remember and enter when they have access to Epicor ERP, reducing errors and missed billable time. Utilizing standard consumer devices on Apple iOS and Google Android, and built using process driven menus, 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 and increase efficiency by providing a secure environment for recording and managing multicurrency expenses across projects, jobs, and service orders, as well as purely internal expenses. Expense Management's flexible approvals process also provides the security to ensure expenses are properly authorized and backed up by a comprehensive audit trail, with approved transactions flowing directly into Accounts Payable for fast, efficient processing and reimbursement. Expense Management functionality includes:

- Access From Calendar
- Detail Expense Entry
- Expense List
- Internal Expenses
- Quick Codes
- Multiple Transaction Comments
- Configurable Expense and Payment Types

- Contextual Approvals
- Advanced Workflow
- Approvals Queue
- Efficient Reimbursement
- Business Process Management
- Proxy Users
- Reporting and Analysis
- Detailed Audit trail

Mobile Expense Management improve expense accuracy and timeliness.

Mobile Expense Management

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.

Production
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, Advanced Production, Lean Manufacturing, Manufacturing Execution System (MES), Advanced MES/EMI, Quality Assurance, Enhanced Quality Assurance, and Advanced Quality Management.

Job Management

The Job Management module is a comprehensive production control solution designed specifically for the planning, routing, scheduling, costing, and tracking of goods—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. Job Management functionality includes:

- Planning Workbench
- Job Manager
- Production Planners Workbench
- Job Costing
- Order-to-Job Linking
- New/Change Order Notifications
- Drag-and-Drop Interface
- Planned Overproduction of Assemblies
- Yield Scrap
- Assemblies
- Scheduling
- Comprehensive Backflush
- Job Tracker
- Productivity Analyzer
- Quality Control Management
- Material Shortage Indicator

Provide detailed information to the plant floor about every aspect of a job.

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

- Support for Co Product Production
- Support for Nested Product Production
- Part and Operation Batching
- Visibility of Production Batching
- Accurate Cost Control
- Simplified Plant Floor Interface
- Concurrent or Subsequent Flexibility
- Single or Multiple Operations

Lean Production

With increased global competition and the demands of an online supply chain, customers more than ever before are demanding greater product flexibility, smaller and more frequent deliveries, and higher product quality—all at the lowest price. Lean Production provides you with the specific functionality your organization needs to meet these challenges and optimize your plant floor operations , including the adoption of Lean Manufacturing Kanban functionality to pull rather than push products through the manufacturing process. Lean Production functionality includes:

- Manufacturing Without Work Orders (Kanban Flow)
- Cell-Based Inventory Management
- Real-time Manufacturing Kanban
- Manufacturing Flow Kanban
- Real-time Stock Replenishment Kanban
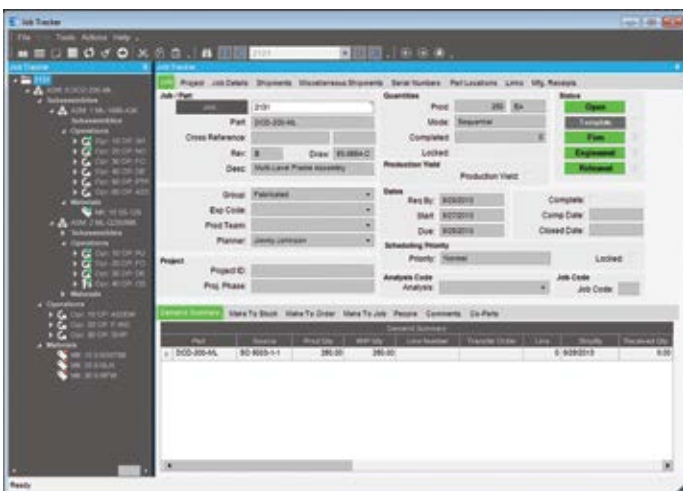
- Real-Time Purchase Kanban
- Automated Material Flow
- Lean Performance Metrics Measurement
- Flexible Lean Metrics
- Support for Hybrid Approaches to Lean
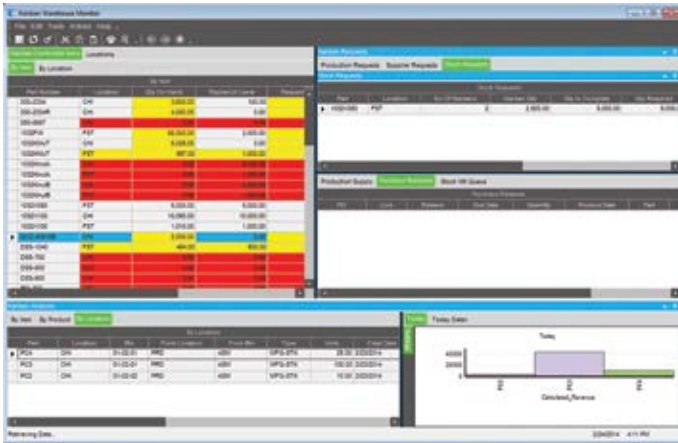
Manage electronic queues for Kanban control with the Kanban Monitor. Optionally display on the plant floor information about current Kanban records in a dashboard format.

Manufacturing 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. Epicor MES provides accurate labor reporting, as well as online transaction tracking, which provides management with real-time picture of what is occurring on the plant floor by employee and job. Integration with Epicor Job Management, Scheduling, Quality Assurance, and Advanced Material Management eliminates dual entry provides online, realtime views of the latest plant floor scheduling priorities. In addition, integrated document management allows plant floor access to needed documentation, such as product drawings, process documents, and multimedia videos. Complete module functionality includes:

Automatically collect and report the status of jobs on the plant floor in real time.

Advanced MES

- Flexible Data Entry Technology
- Comprehensive Document Management
- Work Queue
- Multiple Languages
- Distributed Hours
- Quality Reporting
- Shop Warnings
- Grace Periods/Multiple Shifts
- Trackers in the Plant
- Shop Tracker
- Shipping and Receiving
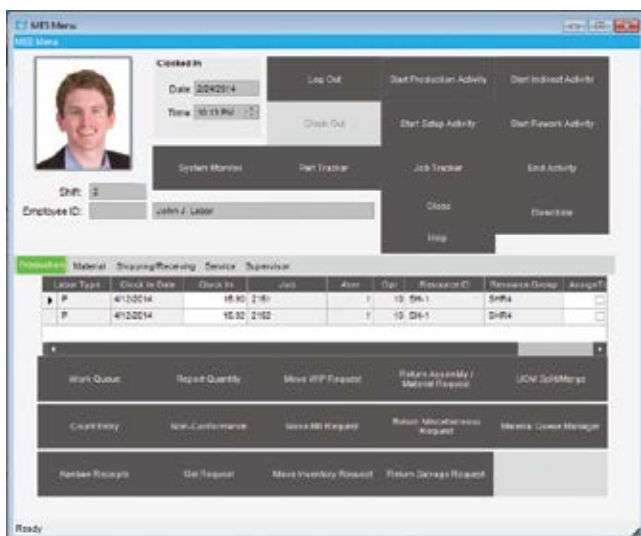- Inventory Management
- Material Handling

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.

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. Advanced MES functionality includes:

- Plant notifications
- Visibility, reporting, and analysis
- Schedule optimization
- Energy monitoring
- Quality management
- Machine maintenance

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.

Quality Assurance

Extending your solution with the Quality Assurance module ensures that you gain complete visibility into your quality operations from a top-down view down to the individual item level, allowing you to tie together all quality functions, whether it's scrapping end parts, rejecting raw materials or tracking first article inspections. Accurate costing demands that products moved through quality accurately reflect their value and are removed from the appropriate work in progress.
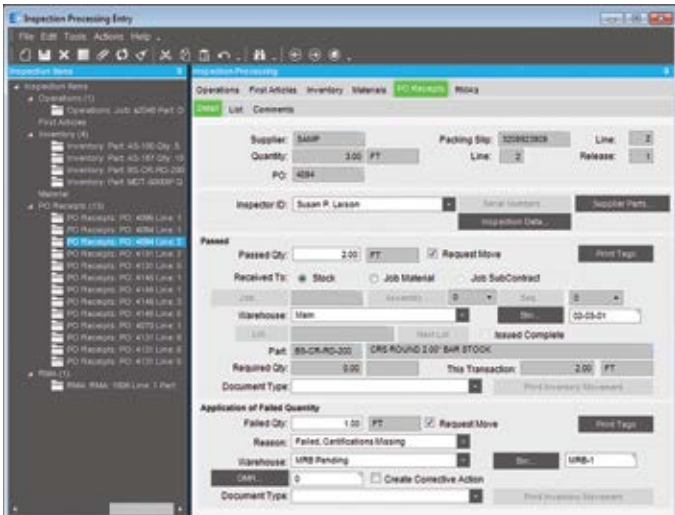
Record and track quality data to fulfill customer requirements and promote continuous improvement.

Additionally, Quality Assurance 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. Inspectors have queues of items to inspect with full disposition and corrective action follow-up, while plant floor employees can easily flag parts as non-conformant. Quality Assurance functionality includes:

- Mobile Quality
- Inspection Workbench
- Nonconformant Records
- Non-Netting Bins
- Discrepant Material Report Processing
- Corrective Action traceability
- Material Review Board

- Cost of Quality
- Packing Slips
- Debit Memos
- Audit Trails
- Certificate of Compliance verification
- Social Quality

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 ensure that your next audit goes smoothly. Complete functionality includes:

- Definable Inspection Attributes
- Specification List
- Customizable Inspection Plan
- Flexible Results Collection
- Statistical Process Control (SPC)
- Flexible Inspection Plan Configuration
- Returned Material Authorization (RMA) Inspection
- First Article Inspection
- In-Process Inspection
- Subcontracting Inspection

- Manufacturing Execution Systems Enabled
- Serial and Lot Traceability
- Inspection Collect Results Location
- Inspection Data Tracker
- Skip Lot Cycle Definitions
- Resource Calibration Test Plans
- Training course management
- Employee skills management
- Employee course request
- Quality Analysis and Real-Time Response to Quality Data
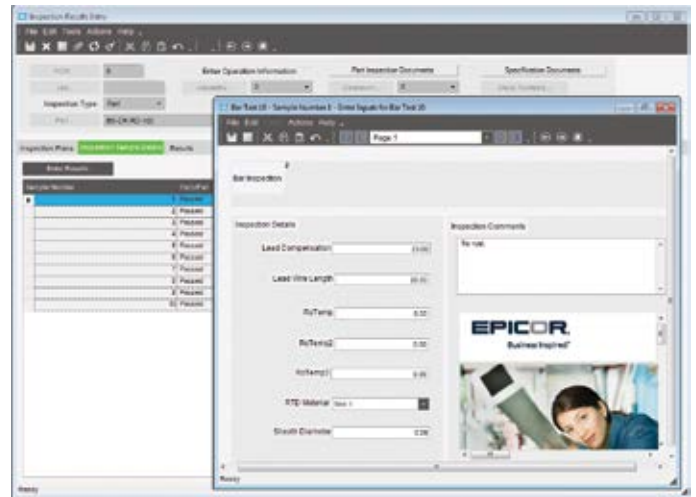
Track inspection results data online.

Advanced Quality Management

Epicor Advanced Quality Management (AQM) provides the foundation for significant productivity improvements and cost reductions across your entire enterprise. This solution includes Product and Process Documentation, Customer and Supplier Management, Nonconformance and Corrective Action capability, and more. Complete functionality includes:

- AQM Compliance and Audit
- AQM Data Collection

- AQM Equipment Management
- AQM Product Launch

Supply Chain
Management

Linking 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 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. Complete functionality includes:

- Supplier Approval Capability
- Automated Purchasing Tools
- Supplier Cross-Referencing
- Mass Purchase Order Receipt
- Multiple Location Receipts
- Part Master Price Breaks
- Purchase Requisition
- Advanced Requisition Management
- Purchase History
- Purchase Order Printing
- Purchase Order Tracker
- Supplier Tracker

Supplier Connect

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 designed to automate the process of purchasing inventory items on a recurring basis, including the establishment of recurring delivery schedules. Contract line items can be assigned to purchase orders, which automates your delivery schedules, with delivery dates, prices, and corresponding quantities. Automatic requirement calculations, based on generated PO suggestions, are factored into delivery schedules, which can be adjusted automatically to conform to supplier requirements, inventory control, production efficiency, and business expediency. Complete functionality includes part schedule maintenance for establishing the combination of part, plant, and calendar that makes up the part schedule, as well as periodicity code maintenance to establish the rules and terms under which orders periodically arrive from suppliers.
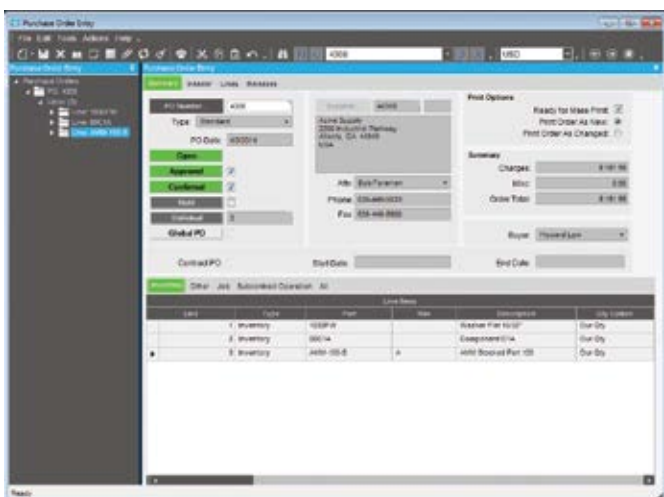
Enter, approve, and confirm purchase orders with multiple line items and releases.

Distribution Requirements Planning

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. Complete functionality includes:

- Demand Manager
- Economic Order Manager
- Requirements Planner
- Exception Signals
- Supply Base Manager

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. Complete functionality includes:

- Buyer's workbench
- Part price-break tables
- RFQ decision wizard

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. 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. Complete functionality includes:

- Alternate Parts Maintenance
- Costing Management
- Cost Tracking
- Country of Origin Tracking
- Cycle Counting and Physical Inventory Mgmt
- Global Trade Standards
- Lot Tracking and Lot
- Attributes Management
- Manufacturers Part Cross Reference
- Online Part Tracker
- Part Cross Referencing
- Part Master Price Breaks
- Physical and Perpetual Inventory
- RoHS Compliance
- Serial Tracking
- Serial Documentation

- Serial Number Tracker
- Serial Number Assignment to Parts
- Serial Number Formatting
- Voided Serial Capability
- Time-Phased Material Inquiry/Report
- Unit of Measure Definitions
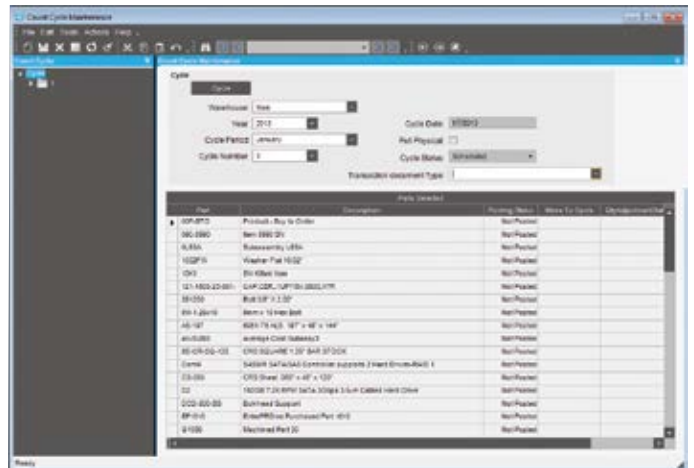
Control inventory and significantly reduce annual audit costs.

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. Complete functionality includes:

- Bar Coding on Demand
- Handheld Capability
- Material Handler Interface
- Material Movement
- Order Prioritization
- Reserving Inventory
- Sales Order Allocation
- Barcode Tag Scanning

Shipping and Receiving

The Shipping and Receiving module is designed to promote increased efficiency and accuracy by allowing you to perform and track all activity relating to shipments and receipts. This flexible module gives you the ability to auto-invoice in Accounts Receivable following customer shipment; print customizable bill of lading forms to your shipments; track container shipments as well as update the status and due dates of all purchase orders; track customer shipments; track landed costs against applicable parts, which reflects the true costs of materials, parts, or finished goods, and more. Complete functionality also includes:

- Auto-invoice
- Bill of lading
- Container tracking
- Customer shipment tracker
- Landed cost
- Manifesting and Freight Management
- Mass Ship
- Subcontract Parts Tracking
- Receipt Tracking
- Miscellaneous Shipment Tracking

- Miscellaneous Receipts Management
- Pack and Ship/Pack Out Processing
- Pack IDs Management
- Master Pack Tracking
- Phantom Pack Shipping
- Label Forms Creation
- Auto-Print Integration
- Customizable Shipping Labels
- Shipping Performance Reporting

Warehouse Management

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. Complete functionality includes:

- Bin Tracking
- Bin Wizard
- Warehouse Team Creation
- Customer Managed Inventory Visibility
- Supplier Managed Inventory Visibility
- Fulfillment Workbench

- Allocation Template
- Wave Picking
- Cross Dock Tracking
- Paperless Picking
- Queue Handling
- Queue Manager
- Queue Trackings
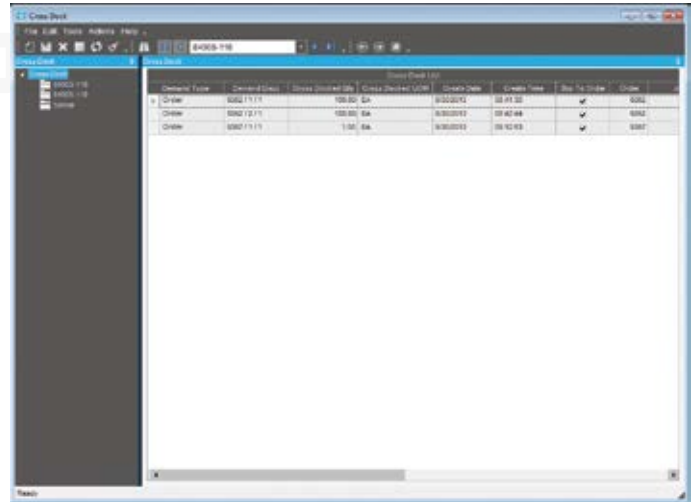
View all cross dock orders waiting to be fulfilled by incoming receipts.

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. The Epicor Handheld module allows you to track your inventory as it moves throughout your enterprise, with real-time data capture improving inventory accuracy and speeding up the order-to-ship cycle. Providing your users with event-based directing and routing of all managed tasks in real-time, the Handheld module not only helps you maintain complete transaction event history for analysis and reporting purposes, but when coupled with Advanced Material Management, it also provides detailed tracking of material requirements and WIP information through mobile access to the material and pick orders queue. Complete functionality also includes:

- Microsoft Terminal Services Compatibility
- Auto Print Control Support
- Seagull Scientific, Inc. BarTender® Labeling Support

See improved inventory accuracy with wireless device management of inventory functions such as on the fly adjustments.

Financial
Management

- Global Engines
- General Ledger
- Advanced Allocations
- Financial Planning
- Accounts Payable
- Accounts Receivable
- Credit and Collections
- Tax Connect
- Rebates
- Cash Management
- Credit Card Processing
- Asset Management
- Advanced Financial Reporting

Epicor Financial Management offers a refreshing new approach to business—a suite of accounting applications built for the highly regulated post-Sarbanes-Oxley Act 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. 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. 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. Complete functionality includes:

- Rules-Based Posting Engine
- Configurable Tax Engine
- Legal Numbering Engine
- Multicurrency Engine
- Rounding Engine

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. 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. This powerful GL application provides the accounting controls and system security necessary to help ensure the integrity of your company's financial data. Complete functionality includes:

- Multiple Book Functionality
- Multiple Chart of Accounts
- Currency Reporting
- Multiple Reporting Currency
- Multiple Closing Calendars
- Calendar Adjustment Period
- User-Definable Chart of Accounts
- User-Definable Balance Controls
- Comprehensive Consolidations and Eliminations
- Robust Financial Report Writer
- Configurable Validation Rules
- Post-Year-End Transactions and Adjustments
- Inter-Company Journals
- Account Tracker
- Flexible Posting Periods
- Global Budget Updating
- Comparison Statements
- Automated Basic Allocations
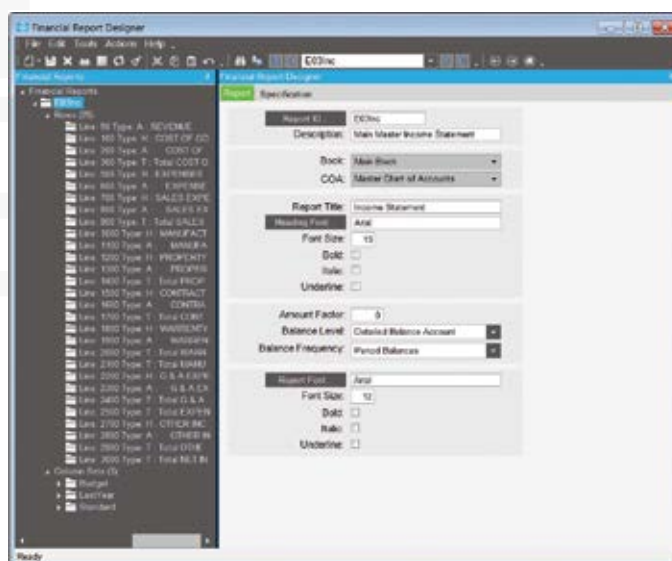
Gain complete control over management and financial reports, such as trial balances, income statements, and balance sheets.

Advanced Allocations

Advanced Allocations automatically computes cost and revenue allocations and the resulting journal calculations, streamlining processes, increasing relevance, and improving accuracy for shorter close cycles and more accurate financial statements. This module 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 timeconsuming and error-prone task. Additionally, an Allocation History Tracker provides a comprehensive view of each Allocation run and all GL transactions created, as well as the ability to reverse allocations directly from the Allocation History Tracker.

Financial Planning

Epicor Financial Planning (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.

- Microsoft Excel® toolset
- Integrated workflow
- Pre-bult templates
- Line item detail
- In-built security
- Social collaboration
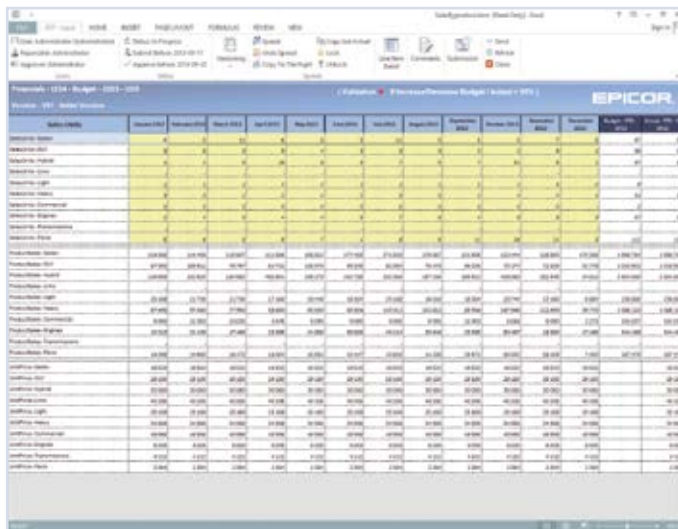
Easily manage budgeting and planning with Epicor Financial Planner Microsoft Excel.

Accounts Receivable

Accounts Receivable (AR) provides a comprehensive set of tools to manage your invoicing, credit, cash management, and customer management needs. With Accounts Receivable you know who is buying what, and who is paying their bills on time.

Complete functionality includes:

- Invoice Entry
- Cash Receipts
- Debit Notes
- Interest Invoices
- Invoice GL Account Definition
- AR Transaction Adjustments
- Deferred revenue
- Multiple Payment Instruments
- Consolidated Invoicing
- Invoice Logging
- Invoice Numbering
- Automatic Credit Holds
- Aging Information and Customer Reminder
- Automatic Finance Charge Calculation
- Bill-To Customer
- Manual Invoice Selection

- Credit Manager Workbench
- National Accounts (HQ Accounts)
- Flexible Tax Engine
- Tax Regimes
- Sales Tax Register
- Invoice/Statement Forms
- Invoice-based Sales Commission Payment
- Multi-Format Sales Analysis
- Credit Card Management and Authorization
- Settlement Currencies
- Settlement Discounts
- Terms and Conditions Support
- Electronic Report Formats and Transmission
- Customer Tracker
- User-friendly Invoice Tracker
- General Ledger Interface
- Cash Management Interface

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. Complete functionality includes:

- Collection Management
- Centralized Activities
- Collection Templates

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. Use this module to define the active rebate programs for your company, generate rebate transactions, and pay rebate amounts to your customers through either an invoice check or a credit memo. Complete functionality includes:

- Rebate Transaction Process Generation
- Get Rebates
- Rebate-to-AP Invoices/ Memo
- Rebate Contract Entry
- Rebate Transaction Adjustment
- Tracker Programs

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.

Cash Management

Improve cash management through the automatic handling and reporting of discounts available, payment due dates, and payment selection methods. This module also allows you to specify the number and type of bank for each of your accounts—including currency—and reconcile your bank statement with entries generated in AR, AP, and payroll. And automatically upload electronic bank statements and autoreconcile them with the manual reconciliation of unmatched items. Perform manual allocation. Complete Cash Management functionality includes:

- Soft Formats for EFT
- Petty Cash Management
- Cash Flow Dashboards
- Credit Card Processing
- Integration with Industry-Leading Providers
- Supports Industry Standards to Reduce Fraud
- PCI Compliance
- Payment Card Industry Data Security Standard
- Credit Card Number Encryption
- Secure Online Credit Card Authorization
- Credit Card Number Validation
- Credit Card Format Validation
- Flexible Configuration
- Transaction Flexibility
- Reauthorize Reservation Transactions
- Transaction Reports
- Credit Card History Tracking
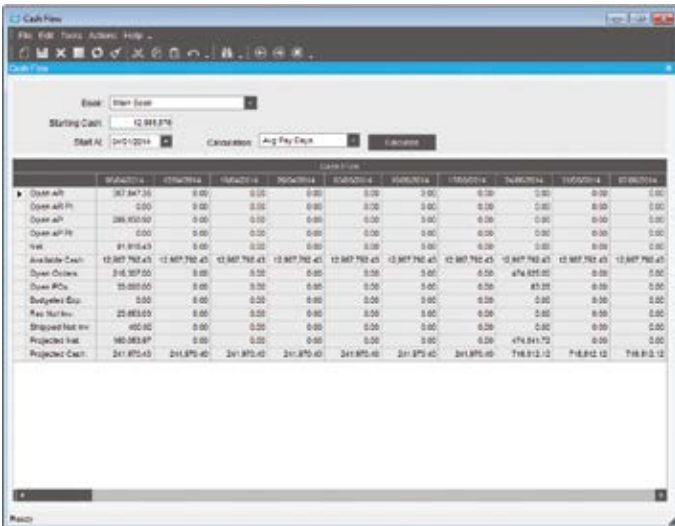
Manage your corporate finances with the easy to use cash flow dashboard.

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.

Asset Management

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, standard asset management tasks—such as asset transfers, disposals, reclassifications, and adjustments can be streamlined. Complete Asset Management functionality includes:

- Mass Maintenance
- Management
- Asset Registers
- Asset Valuations
- Asset Relationships
- Maintenance
- Multicurrency
- Management
- Asset Depreciation
- Methods
- Asset Integrations
- Grants
- Asset Locations
- Asset Import
- Retroactive Adjustments
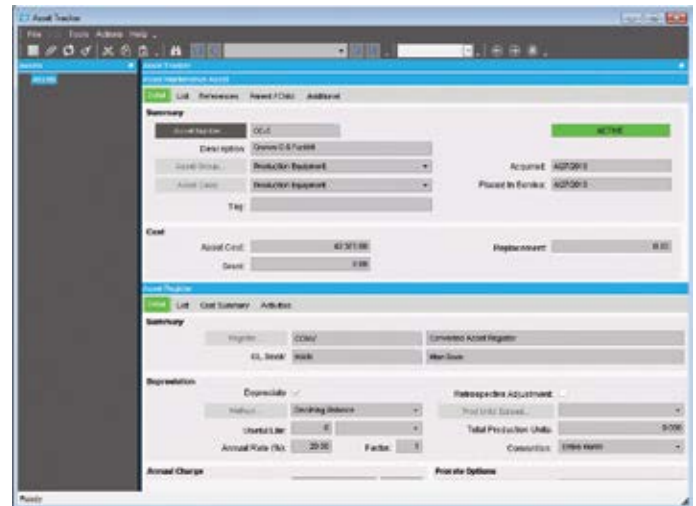
Maintain accurate tracking and depreciation of company assets.

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.
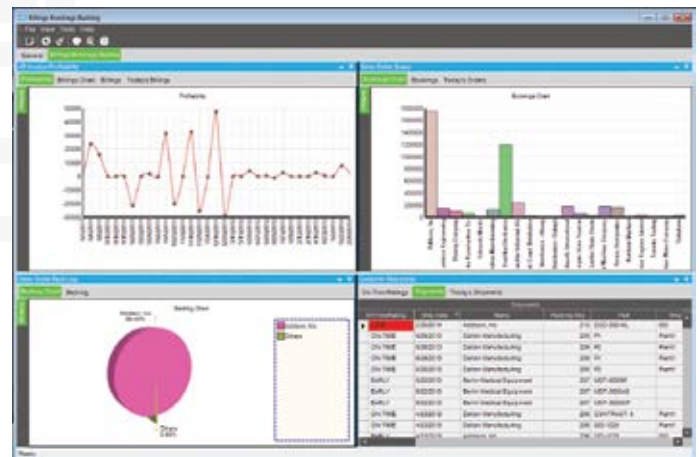
Enterprise Performance
Management

• Trackers and Dashboards
• Advanced Financial Reporting
• Budgeting, Planning, and Forecasting
• Operational Data Store and Data Warehousing
• Content Packs
• Scorecards & KPIs

Epicor Enterprise Performance Management (EPM) 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 prepackaged 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 delivering professional reports and analysis to business stakeholders in a format that business users can easily consume.

Trackers and Dashboards

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, including real-time, exception-driven indicator flags. Tooled with unique flexibility, Dashboards enable users to develop their own workbenches using a series of online views of information. 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. Complete functionality includes:

Closely manage customer and supplier performance with comprehensive role-based and interactive Dashboards that offer a complete picture.

- Role-Based Home Page
- Real-time Exception-Driven Management
- Real-Time Access to Up-to-Date Information
- User/Function-specific Workbenches
- Drill-Down Trackers
- User-Level Personalized Components
- Custom Component Generation

- Personalized Functionality
- Open to Related Functionality
- Fully Secured Web Interface
- Web Deployable Components
- Predefined Dashboards
- Dashboard Style Sheets
- Dashboard Charting
- Executive Dashboards
- Dashboard Assemblies
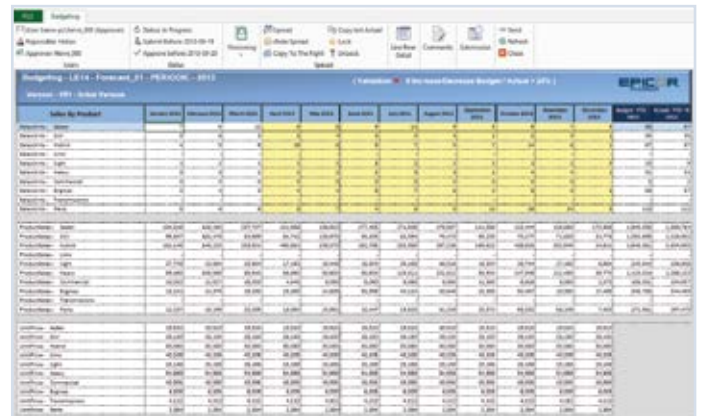- Self Contained Dashboards

Advanced Financial Reporting

Epicor Advanced Financial Reporting (AFR) allows the creation and distribution of professional financial reports to company stakeholders. AFR simplifies report creation through an intuitive interface, which allows for the creation of reports using elements familiar to accountants or financial professionals, such as spreadsheet terms. It also provides an additional element of reporting hierarchy or trees, allowing the viewer to generate the report for a specific business segment. Viewers can generate these parameterdriven reports as needed by selecting the time, company, book, or organizational element as required without the need for financial team intervention.

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 large implementations across multiple installations, as well as managing mixed content from multiple sources. Canvas Planning can be used across a wide range of applications including financial, human resource, supply chain, capital planning, sales, profitability, and more. EPM Canvas Planning uses Microsoft Excel, Microsoft SQL Server, Microsoft SQL Server Analysis Services and EPM Performance Canvas Server to create a powerful platform for advanced and collaborative Budget, Planning and Forecasting—even for very large organizations. Complete functionality includes:

Financial Planning

- EPM Canvas Planning
- Single Repository for Data
- Canvas Planning Business Modeler
- Built-in Financial Intelligence
- Web-Based Analytics
- Guided and Contextual Analysis and Planning
- Slice and Dice Analytics
- Top-Down/Bottom-Up Planning
- Built-in Process Management
- Multiple Currency Conversions

Epicor Financial Planning (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 EPM Canvas Planning Financial Planner.

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. In order to manage this need, Epicor EPM offers a comprehensive set of tools that transforms your online transaction processing (OLTP) source data and turns it into actionable analytics. Complete functionality includes:

- Epicor Database Replication Server
- Epicor EPM Server
- Epicor Operational Data Store
- Epicor Data Warehouse and OLAP Cubes
- Epicor Cube Connect
- Cube Connect Management Console
- Epicor EPM Canvas Deployment
- Standard OLAP Consumers Sets

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. Many of the existing tools available today for KPI and Scorecard creation require data warehousing and the assistance of business for often lengthy project development. Even so, many scorecards remain static in terms of what they are measuring, and are not normally designed to handle ad hoc analysis. Complete scorecard and KPI functionality includes:

- Epicor EPM Canvas
- User-Friendly Design
- Multi-KPI Scorecards
- Multiple Scorecards
- Business-Specific Term Support
- Drag-and-Drop Info Display
- Multiple Canvas Support
- Microsoft SharePoint Canvas
- Search Canvas
- Mobile EPM

Use Mobile EPM to review business metrics on the go.

Content Packs

Content packs provide a powerful, yet flexible, packaged analysis environment designed to fit organizations of various sizes in different industries. Offering end-to-end performance analysis, Epicor EPM Content Packs provide the quickest and easiest way to get up and running with advanced analytics from your Epicor system. All content packs can be deployed against a single company or against multiple companies for cross-company analysis of trends and performance. Complete functionality includes:

- Sales Management
- Production Management
- Material Management
- Financial Management

Governance, Risk, and Compliance

- Risk Management
- Security Management
- Business Process Management
- Corporate Governance
- Global Trade Compliance
- Environmental and Energy Management

Effective Governance, Risk and Compliance (GRC) initiatives help companies, and their employees stay compliant, and 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

Enterprise Resource Planning (ERP) systems control the majority of corporate information that could potentially be at risk from piracy, fraud, and sabotage concerns. The only way to truly manage and mitigate risk across the organization is to have a fully integrated, end-to-end solution providing a 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. It also incorporates the ability to infuse business insight through Epicor EPM, as well as allows organizations to embrace data governance and data protection strategies, help control risk, effectively handle regulatory compliance and ultimately drive business performance.

Automatically track changes with risk mitigation tools such as table and field level audit capabilities.
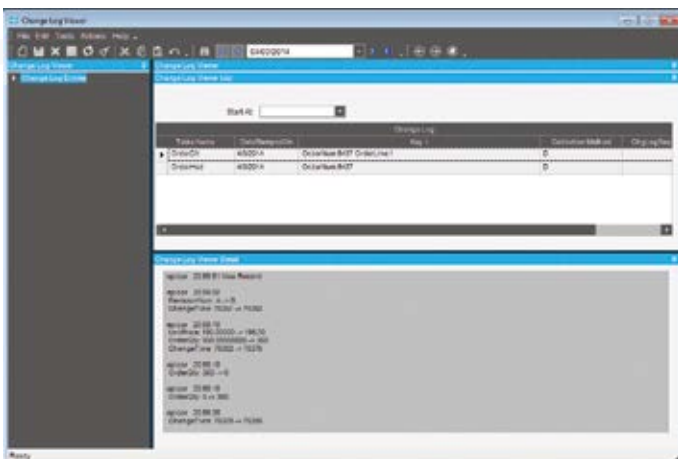
Security Management

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. There is also an option to use Microsoft Windows® Authentication to support a Windows single sign-on and password policy. Complete functionality includes:

- Product Security
- Application Security
- Access Security
- Business Security
- Automated Change Logs
- Audit Logs
- Automation Tool for Epicor (ATE)
- Credit Card Authorization and Encryption

Business Process Management

Epicor BPM, in combination with Epicor Service Connect, allows you to identify risky processes to your organization and effectively mitigate risk through business-defined workflow by identifying and improving processes to make your business more efficient, more disciplined, and better able to adapt to change. Together, they provide a framework for building GRC process-driven integration points that give companies seamless integration capabilities with other applications and businesses. BPM also automates delivery of information to employees internal to your organization that are responsible for managing and monitoring internal controls. Complete functionality includes the ability to build and execute workflow throughout the system for your unique business rules, as well as invoke and require electronic signatures for processes with secure authorization and password.

Corporate Governance

Organizations are under increased pressure to file accurate financial results in a timely manner. 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. Ultimately, when companies adequately report, plan, budget, forecast, and periodically review and update budgets and forecasts, they exhibit a more mature level of internal control. 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. Complete Corporate Governance functionality includes:

- Epicor Financial Report Writer
- Financial Planner
- Advanced Financial Reporting

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 local and regional documentation requirements. Epicor Global Trade Compliance applications provide a comprehensive platform for managing these trade compliance necessities. Complete functionality includes:

- Global Trade Standards—Items
- Landed Cost Management
- Country of Origin Tracking
- RoHS/WEEE Compliance
- Product Lifecycle Management
- International Shipping and Documentation
- Quality Management
- Audit Trail Visibility
- Turnkey ISO, automotive (TS), aerospace (AS), and FDA (cGMP, FDA 21 CFR Part 11) support

Environmental and Energy Management

As the world continues to analyze energy availability, businesses, too, are turning their attention to areas of opportunity—reduction of carbon emissions, energy conservation and supply chain sustainability. Companies will look to IT and software solutions to help them find opportunities to 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.

Business
Architecture

- SaaS, Hosted, and On-Premise Delivery
- Services Architecture
- Microsoft .NET and SQL Server Optimized
- Web Access, Mobile Access, web services
- Business Activity Queries

- Enterprise Search
- Business Process Management
- Information Worker
- Service Connect
- SharePoint Publisher
- Social Enterprise

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.

Epicor separates the design and development of our technology platform from the applications themselves. The tools and frameworks 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 a number of key needs required by modern enterprises, including:

- Flexible Deployment Options: On Premise, Hosted, or in the Cloud
- Service Oriented Architecture (SOA)
- Complete Fail-Safe Options
- High End Scalability
- Epicor Everywhere™ Framework

- Windows Forms, Web Forms, and Mobile Device Forms
- Built in Customization Engine
- Comprehensive BPM Platform
- Embedded Dashboards
- Connected People, Systems, and Processes

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 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]

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[1] Magic Quadrant for Single-Instance ERP for Product-Centric Companies, Gartner Inc., June 27, 2012

Epicor Everywhere Framework

Rather than rewriting our application forms to support mobile devices and the Web, We've 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 smart clients or Web clients or on mobile devices, all from the same source code. This framework also ensures that user customizations and personalization remain intact, whatever the UI. Web forms can be accessed from many different browsers. 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. Complete functionality includes:

- Epicor Mobile Access
- Mobile Dashboards
- Support for BlackBerry & iPhone
- Epicor Desktop Client App
- Unlimited Comments
- Personalized Keyboard Shortcuts
- Tool Tips
- Simplified Navigation
- User-Defined Searches
- Comprehensive Cut-and-Paste
- Transaction Visualization

- Form Worksets and Navigation
- Advanced Grid Management
- Advanced Personalization
- Powerful Customization Engine
- Customization Wizard
- Dynamic User Defined Fields
- Global-Ready Localization
- External Update Method Added to All Business Objects
- Styling and Themes

Epicor Everywhere provides a rich user experience over the Web.

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. The underlying architecture behind Information Worker provides direct access to updatable BAQs. Information Worker also is able to call Epicor Web Access forms as well as desktop application forms from the Information Worker menus. Complete functionality includes the ability for authorized users to retrieve, view, and modify Epicor data; download the data you need directly into your Microsoft Office application without leaving your current task; and support for customer relationship initiatives.

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 created, queries can be used throughout the application—to generate SSRS reports, for quick searches or to view results in a Dashboard. Complete functionality includes:

- BAQ Design Wizards
- Graphical Table Links
- Embedded Calculations
- Multiple Data Views
- Analyze/Test Query Tabs

- Updatable BAQs
- External BAQs
- Configurable Dashboard Applications
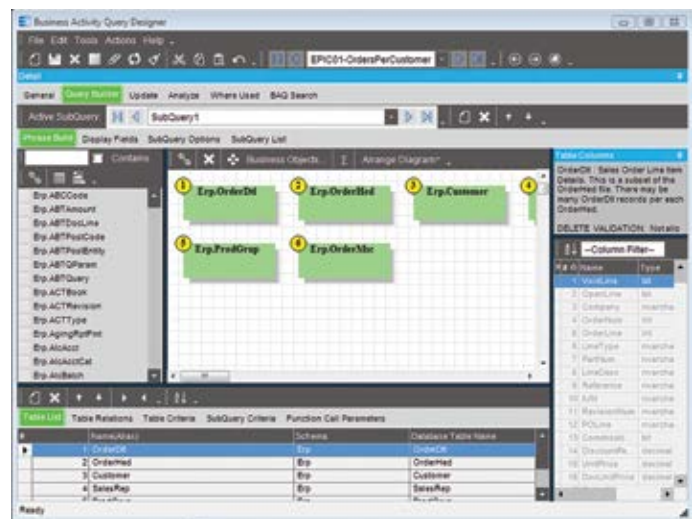
The BAQ Designer provides many easy to use features for creating business queries.

Business Process Management and Workflow Management

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. Complete functionality includes:

- Multi- and Single-Tiered Task Management
- Easily Definable Tasks
- Electronic Sign-Offs
- Type-Based Task Categorization
- Definable Task Lists
- Detailed Message Log
- Automatic Work Assignment & Routing
- Automatic WIP Notification
- Automatic Alert Notification
- Automatic Carry Out Processes

Workbench Views

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, including the Change Log, which allows you to identify key areas to track; Alerts, which immediately send an email notification alerting internal or external personnel when key transactions have been changed; Execute Processes, which automatically carry out a process to update other parts of the system when a key transaction has changed; and Manage Exceptions, allowing you to easily activate alerts to immediately gain control of expensive exceptions.

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. Complete functionality includes:

- Seamless Integration and Workflow Capabilities
- Easy-to-Use Designer with Wizard Interface
- Pre-Process Condition Builder
- Post Process Routine Automation
- Customizable Base Process
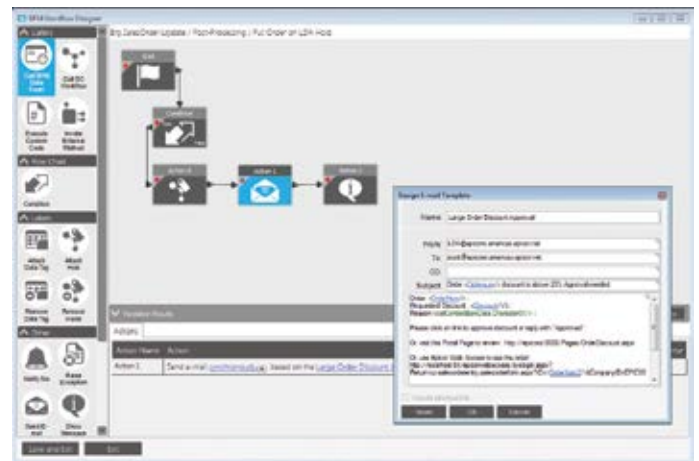
Build new controls and validate easier with BPM.

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. Complete functionality includes:

- Embedded capabilities
- Business notification
- In-context and on-demand
- Activity streams
- Collaboration
- Knowledge base

Monitor changes using activity streams within an Epicor 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. Complete functionality includes:

- Drag-and-Drop Attachments
- Secure Document Repository
- Contextual Retrieval
- Multi-Format Document Viewing
- Automated Product Documentation Workflow

Enterprise Search

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. Complete functionality includes:

- Secure Search Results
- User-Definable Searching
- Easily Find Relevant Business Data
- Data Drill-Down Capability
- Complete Search Results in Browser
- Epicor Administration Console-Based System Configuration
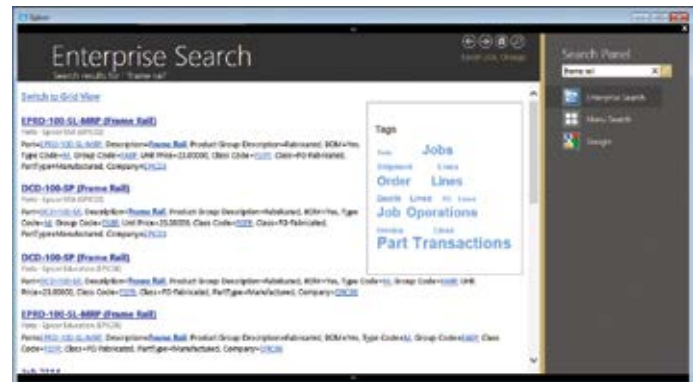
Epicor Enterprise Search delivers search options for relevant business information in a format similar to Google.

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.

Composite Applications

Enabled by the Epicor Everywhere Framework, Epicor application Web forms generated from XML 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. Within Microsoft Office SharePoint Server it is possible to build composite applications that combine various connected Web Parts, such as Epicor Web forms, 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. Complete system tool functionality includes:

- Centralized Administration Console
- Comprehensive System Monitor
- E-mail Integration
- Separation of Epicor ICE from Epicor Applications
- Multiple System Agents
- Extended Reporting Framework
- Customizable Printed Forms
- Auto Print Control
- Advanced Print Management
- Support for Multi-Version Environments

Security

Epicor's comprehensive security features secure access to multiple companies without having to close all forms or carry out different logins when switching companies. Plus, Epicor ICE provides the option for Microsoft Windows Authentication and Windows Single Sign-on and Password Policy, as well as method security protocols to secure 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. Complete Security features also include:

- Data Level Security
- Security Reporting
- Online Edits and Audits
- Date and Time (Using Server Time) and User Name for Auditing
- Product Security
- Application Security
- Access Security
- Business Security
- Change Logs
- Complete Audit Control
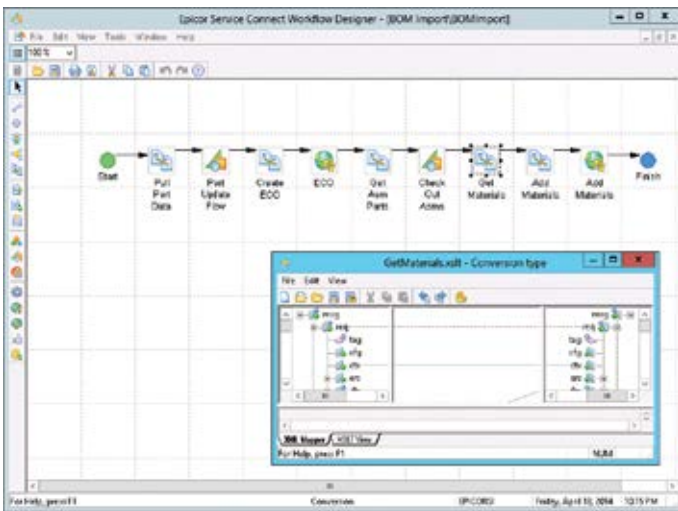
Automation Tool for Epicor

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 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.

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.

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 SOA, the power of Service Connect can be used to streamline processing within the application framework. Epicor Service Connect enables you to promote lean principles, continuous performance initiatives, and Six Sigma quality throughout the organization; incorporate workflow and system orchestration through visual designers with little to no programming effort; easily link and transform XML documents to map to different systems; quickly review and track in-progress processes or after the process completes with Service Connect workflow logs; and perform full dataset and multiple record updates in the same way as the Web service Update method processes data.

Epicor Service Connect, a rapid platform for incorporating workflow and system orchestration through visual designers with little to no programming effort.

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 summaries, 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.

Documentation and Content Delivery functionality includes:

- Detailed user guides
- Comprehensive feature summary
- Robust Application help
- Intuitive field level help
- Technical reference guides
- Embedded courses
- Customizable help and courses
- Epicor University
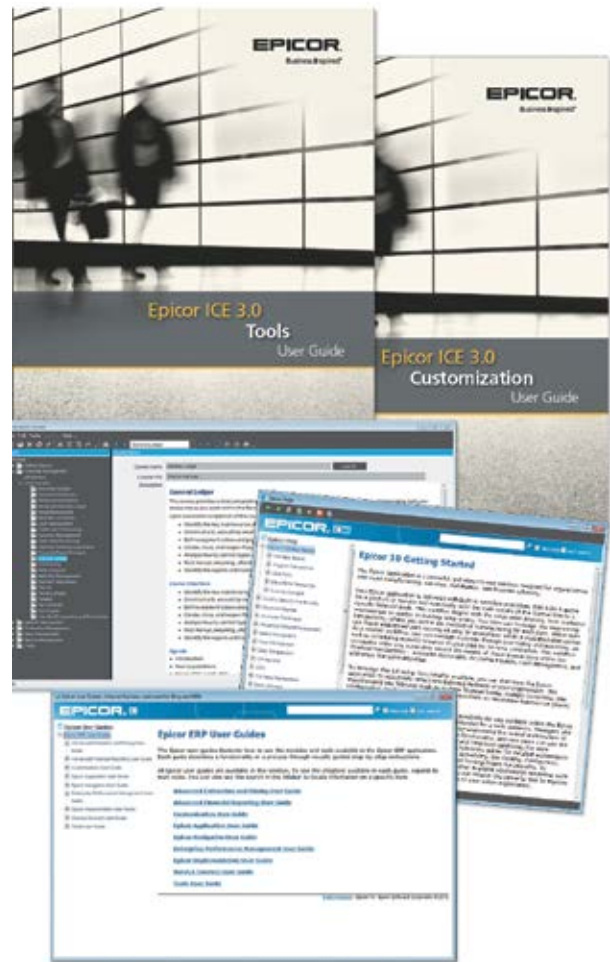
Epicor provides extensive educational materials including printed user guides.
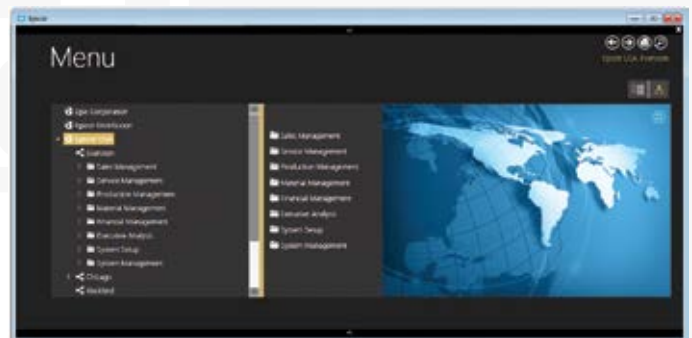
Global Business
Management

• Multicompany Management
• Multicurrency Management
• Global Multisite Management
• Multilingual Data Management
• Master Data Management
• Epicor Service Connect

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. However you choose to define your business, Epicor supports transactional functions between systems and entities including intercompany 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 operations, such as procurement and accounts payable, as well as offer enhanced tools to improve operational visibility across companies. Automation and recognition of inter-company financial transactions 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, scalable technology framework to support global enterprises that offers development choice, and includes a set of productivity enhancing tools designed for global business operations. Complete functionality includes:

Create user and role profiles across companies and move effortlessly between them using simple menu hierarchies.

- Multicompany Option Menu

- Define Global Customers, Parts, and Suppliers

- Company-Specific Credit Mgmt

- Automatic Forecasts

- Unique Accounts Establishment

- Centralized Payment Flagging

- Consolidated Purchasing

- Multicompany Financial Consolidation

- Multiple Currencies Mgmt

- Global Supplier Price Agreement Setup

- Multicompany Journal Entry

- Inter-Company Trading

- Inter-Company Eliminations

- Subcomponent Security

- Virtual View Builder

- Unlimited Hierarchy

- Scalable Deployment

- Robust Messaging Engine

Multicurrency Management

Multicurrency Management automates the process of both buying, and selling in foreign currencies, including tracking of default currencies as well as extensive exchange rate tables. 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. Complete functionality includes:

- GL-Level Revaluation Options
- Multiple Currency Tables
- Definable Exchange Rate Update Scheduling
- Gain/Loss Reporting
- Base Currency Reporting
- User-Definable Bank Accounts
- Customer Price Lists
- User-Definable Base Currency Quotations

- Default Base Currency Customer Orders
- Default Base Currency Service Contracts
- Default Currency Invoicing
- Default Currency Cash Receipts
- Supplier Price Breaks Tables
- Default Currency Purchase Orders
- Accounts Payable
- Base Currency Check Box

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.

Global Multisite Management

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 quarterend. Epicor supports both scenarios within Global Multisite Management, providing support for centralized accounting and purchasing, while allowing separation of production and distribution facilities.

Manufacturing and distribution organizations can also leverage the planning and scheduling efficiencies with Epicor's robust multi-plant functionality. Complete functionality includes:

- Sourcing by Plant
- Comprehensive Production Plant Visibility
- Virtual Plant Support
- Shared Warehouses
- Costing Workbench - Cost by Plant

- Alternate BOMs and Routings Per Plant
- Multi-Plant Scheduling Functions
- Subcomponent Security

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. Complete functionality includes Epicor Layered Client Framework, which 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.

Master Data Management

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. Complete Master Data Management functionality includes:

- Extensible Markup Language Support
- Powerful Transformation Engine
- Local and Global Management

- System Independent Data Hierarchies
- Field-Level Management

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 True SOA, the power of Service Connect can be used to streamline processing within the application framework. Epicor Service Connect enables you to promote lean principles, continuous performance initiatives, and Six Sigma quality throughout the organization; incorporate workflow and system orchestration through visual designers with little to no programming effort; easily link and transform XML documents to map to different systems; quickly review and track inprogress processes or after the process completes with Service Connect workflow logs; and perform full dataset and multiple record updates in the same way as the Web service Update method processes data.

Exploiting the Value of Epicor SOA

Because Epicor solutions are built using a service oriented architecture, 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, and so forth. Orchestrating this process within the Service Connect Workflow Designer eliminates many of these steps by routing processes to automated tasks, such as ordersubmit-direct-to-pick for specific inventory items or order fulfillment for your best customers.
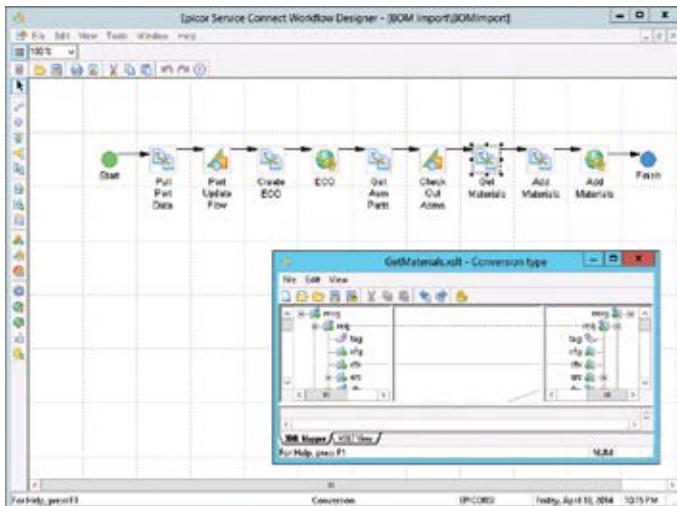
Epicor Service Connect, a rapid platform for incorporating workflow and system orchestration through visual designers with little to no programming effort.

Notes

About Epicor

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

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