

EPICOR ENTERPRISE 7.4

RELEASE GUIDE, DECEMBER 2008



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Enterprise 7.4

Introduction

Epicor Enterprise is an award-winning ERP solution that includes financial management, supply chain management, customer relationship management, and related applications that enhance the productivity of organizations.

With the release of Enterprise 7.4, Epicor demonstrates its ongoing commitment to this solution and its customers by providing over 60 new enhancements to help businesses run more efficiently. Most of these enhancements are the result of direct input from our customers and users who saw opportunity to increase the value of their system through the development and delivery of new features.

Epicor Enterprise 7.4 reflects our fundamental philosophy as a software provider:

- Place customers at the center of everything we do
- Develop and deliver world-class software to help our customers achieve operational excellence
- Provide innovative technologies that empower our customers to become market leaders
- Surround our customers with resources and self-service tools to provide world-class customer service and satisfaction
- Deliver single point accountability in everything we do

Epicor Enterprise comprises eight product suites that deliver end-to-end enterprise business applications designed for distribution and service companies in specific vertical industries.

Improvements to facilitate and optimize functionality were determined, in-part, as a result of end-user participation the enhancement survey and prioritization process.

In keeping with this ongoing effort, we established list of enhancements for release 7.4 of Epicor Enterprise. These are the key themes for this release:

UI Uplift and Usability Enhancements	The Enterprise Desktop is the first screen that users see. This has been updated with some fresh design components. Additionally, some cosmetic changes have been made, particularly in SCM, to improve the usability of selected features.
Responsiveness to Customers	This release contains many enhancements that were suggested by and prioritized by customers. In many cases, these enhancements help streamline processes and provide the right information at the right time to frequent users of the applications.
Automation of More Business Processes	Enterprise 7.4 has capabilities to cover additional business processes, providing additional value from your Epicor solution.

WHAT'S INSIDE

This guide covers the features, functionality, and technology introduced in Enterprise 7.4. It also provides information on professional services, product support, education, and other important topics related to this release.

Features

System Enhancements

Several of the enhancements in this release are system-wide, including compatibility with the latest technology platforms as well as enhancements to the user interface. Microsoft® SQL Server® 2008 Compatibility

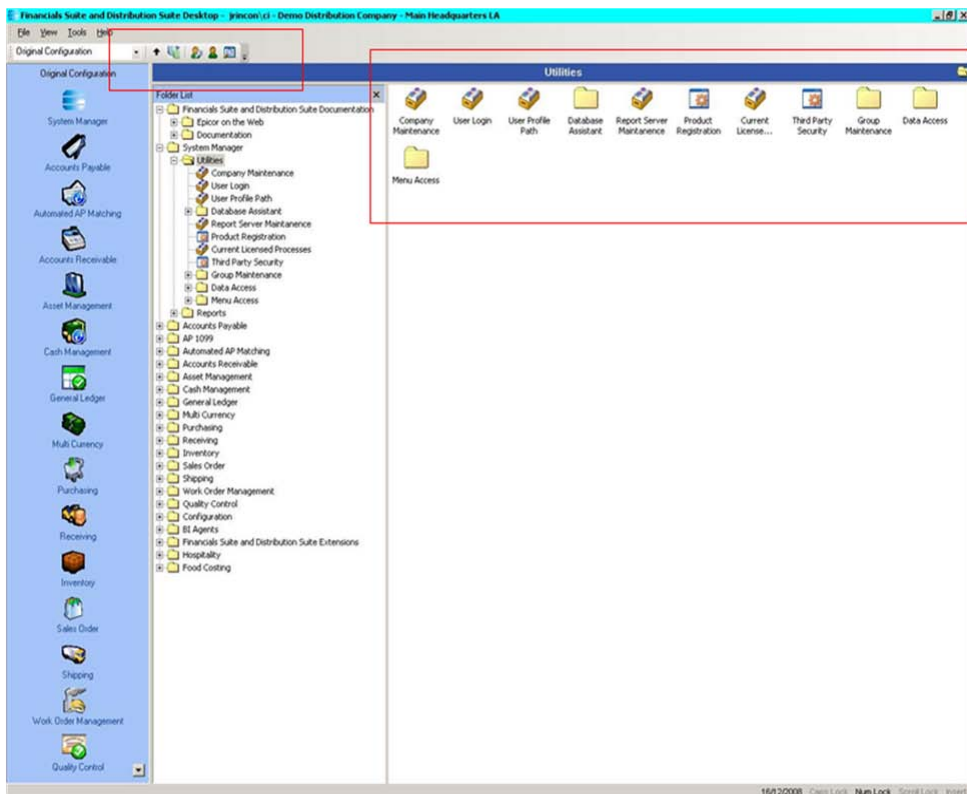
Epicor Enterprise Financials, Supply Chain Management, Supply Chain Execution, Customer Relationship Management, Extensions, and DBAudit are now compatible with Microsoft SQL Server 2008, as well as SQL Server 2005.

Strong passwords are enforced on the System Administration User Login screen. This includes the installation of components in the SQL Server machine, compatible with 64-bit and 32-bit operating systems. This is applicable for both SQL Server 2005 and SQL Server 2008.

DESKTOP USER INTERFACE IMPROVEMENTS

The Enterprise system now has an updated visual. Several visual traits were adjusted for this theme:

- Updated toolbar icons for forms and desktop.
- New icons are used for folders, transaction entry forms, setup forms, and reports.
- New icons are used for toolbar options for Change Company, User Security, and Explorer.
- The font is consistent with Outlook 2007.



MICROSOFT WINDOWS VISTA® COMPATIBILITY

Epicor Enterprise Financials, Supply Chain Management, Supply Chain Execution, Customer Relationship Management, Extensions, and DBAudit are now compatible with Microsoft Windows Vista.

CRYSTAL REPORTS 2008 COMPATIBILITY

Epicor Enterprise Financials, Supply Chain Management, Supply Chain Execution, Customer Relationship Management, and Extensions are now compatible with Crystal Reports 2008 and are no longer compatible with Crystal Reports XI.

REGIONAL SETTINGS HONORED FOR DATES

All Crystal Reports in Enterprise now honor the date format symbols of the client regional settings.

MULTICURRENCY SETTINGS HONORED FOR CURRENCY

All Crystal Reports in Enterprise now honor the currency symbols of the client multicurrency settings.

BANK ACCOUNT NUMBER ENCRYPTION

Wherever bank account numbers are displayed, the entire account is masked with an asterisk (*) except for the last four digits. Also, the actual value of the account number is encrypted within the database.

EPICOR PORTAL SCHEMAS

Enterprise 7.4 shares the same schemas as Portal and Information Worker, allowing for the standardization of products and streamlined integration. This facilitates end-user operation and enhances system performance.

Financial Suite Enhancements

Upgrades to functionality on many forms and system-generated reports allow for the enhanced control of information, efficient operations, and increased system performance.

GENERAL LEDGER

Reference code field on transaction listing

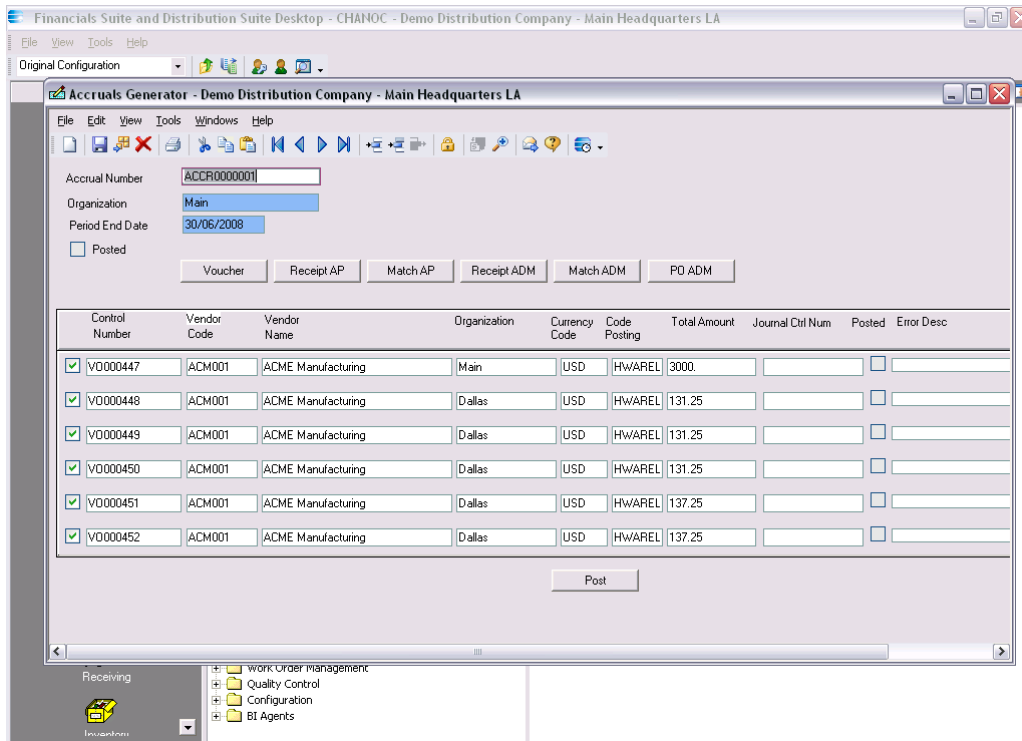
The Reference Code value has been added to the transaction listing detail style for each journal detail.

ACCOUNTS PAYABLE

AP accruals generator

A new function creates accrual journals, or reversing journals, at the end of the month. The new window provides the option to select un-posted vouchers, matches that are not posted and receipts that are not matched (from AP Matching), and matches not posted, receipts not matched, and outstanding purchase orders from Supply Chain Management, to load into the form.

You can then select which of the transactions should be the basis of a new accrual. One accrual journal should be created per selected transaction, but instead of the AP Control account, a new AP Accrual account is used. A new set of accounts needs to be configured in AP Posting codes to be used by this functionality.



AP Matching

You can now specify the PO number in the Matching Entry form, during the creation of a new matching record. As a result, you can select a PO and the application fills all Matching Header values, and loads the details of all receipts related to that PO.

The PO number is included on this form, so that you can search for a PO to be the basis for the matching entry. Enter the PO number, click on the Load button, and the order and details are added to the matching record.

Listing of all checks

The Payment Register, a listing of all checks regardless of status, is now available. As a result, you can review a sequential listing without gaps.

AP Posting Accounts Form

This form has been modified to use a new set of accruals accounts in the posting process for each type of transaction (such as vouchers or POs). The new accounts must be configured beforehand, to start each kind of transaction.

The new Accruals Account Code fields are zoomable, so you can search for the account code.

Important Notes

Some important information pertains to all of this:

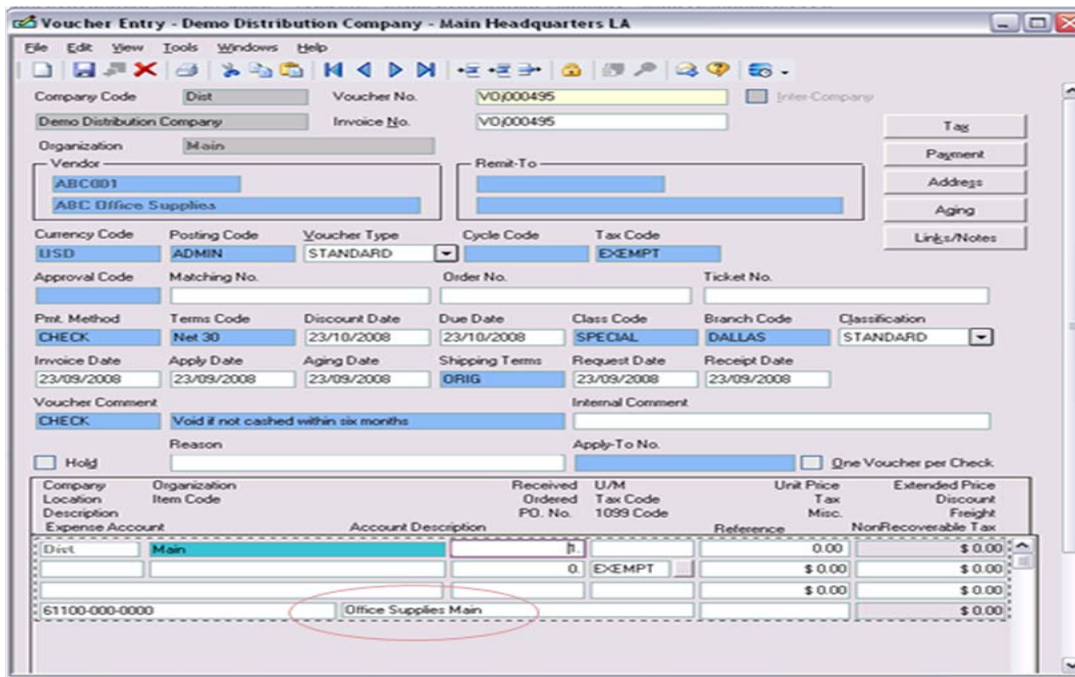
- The journals created by the Accrual process are marked as reverse for the new fiscal period.

- The documents involved in this process are not affected; the values are copied to the created journal
- The process performs GL validations on the documents but not the entire document records.
- All posted transactions appearing at the end of a report that lists the transactions list whether the posting was successful or any errors.
- The accruals are saved into tables. The header contains the accrual control number, user ID, date, and the organization. The detail table stores the list of documents used on each accrual, with a link to the journal control number.

Account description on AP screens

The account description now appears next to the account code in the detail section of screens Voucher Entry, Voucher Adjustment Entry, and Debit Memo Entry.

The account description is included next to the expense account, and the company code field is on the first line with the Organization field.



Name recurring vouchers

When Accounts Payable is run in batch mode, you can now use the Batch Description as a way to identify vouchers in the batch, for batches going forward.

A new field, "Keep Description In Recurring," is now available in the Name and Options form for Accounts Payable.

Remit-To button on the Vendor form

Vendor Maintenance has a new button, "Add Remit To," useful for launching the Remit-To form. The vendor information on this form defaults from the main Vendor information (address, currency code, attention information, contact information, and so forth).

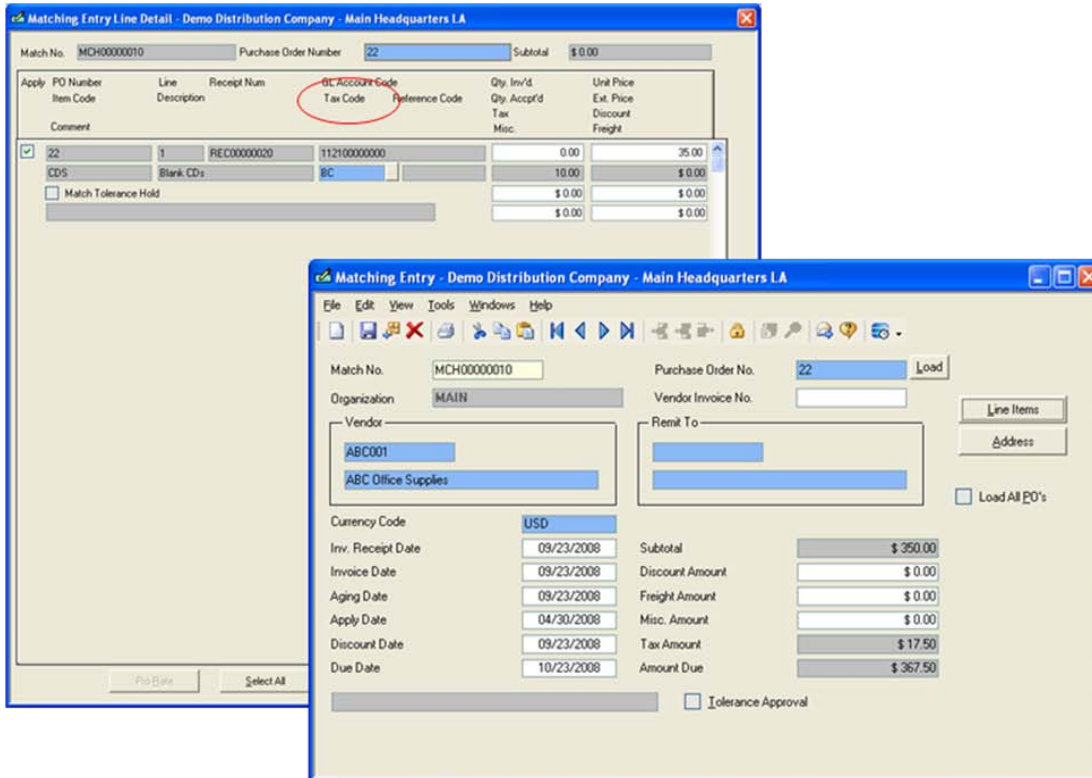
Expanded Vendor Name fields

Vendor Maintenance has a new button, "Extended Name," that opens a dialog box to support a vendor name of 120 characters.

It also has a checkbox, "Use Extended Name in Printed Documents," which if when checked uses this extended name on all printed documents such as checks, purchase orders, and AP 1099 generation.

Default tax codes in AP matching

The Receipt Adjustment form and Matching Entry form now default the Vendor's tax code into each line item that does not already have a tax code. As a result, you no longer need to edit every detail line for a tax code.



Launch Voucher from the Approve Transactions window

On the Approve Transactions window, each transaction is accompanied with an Open button. Use this button to open the corresponding document to determine whether or not to approve the transaction.

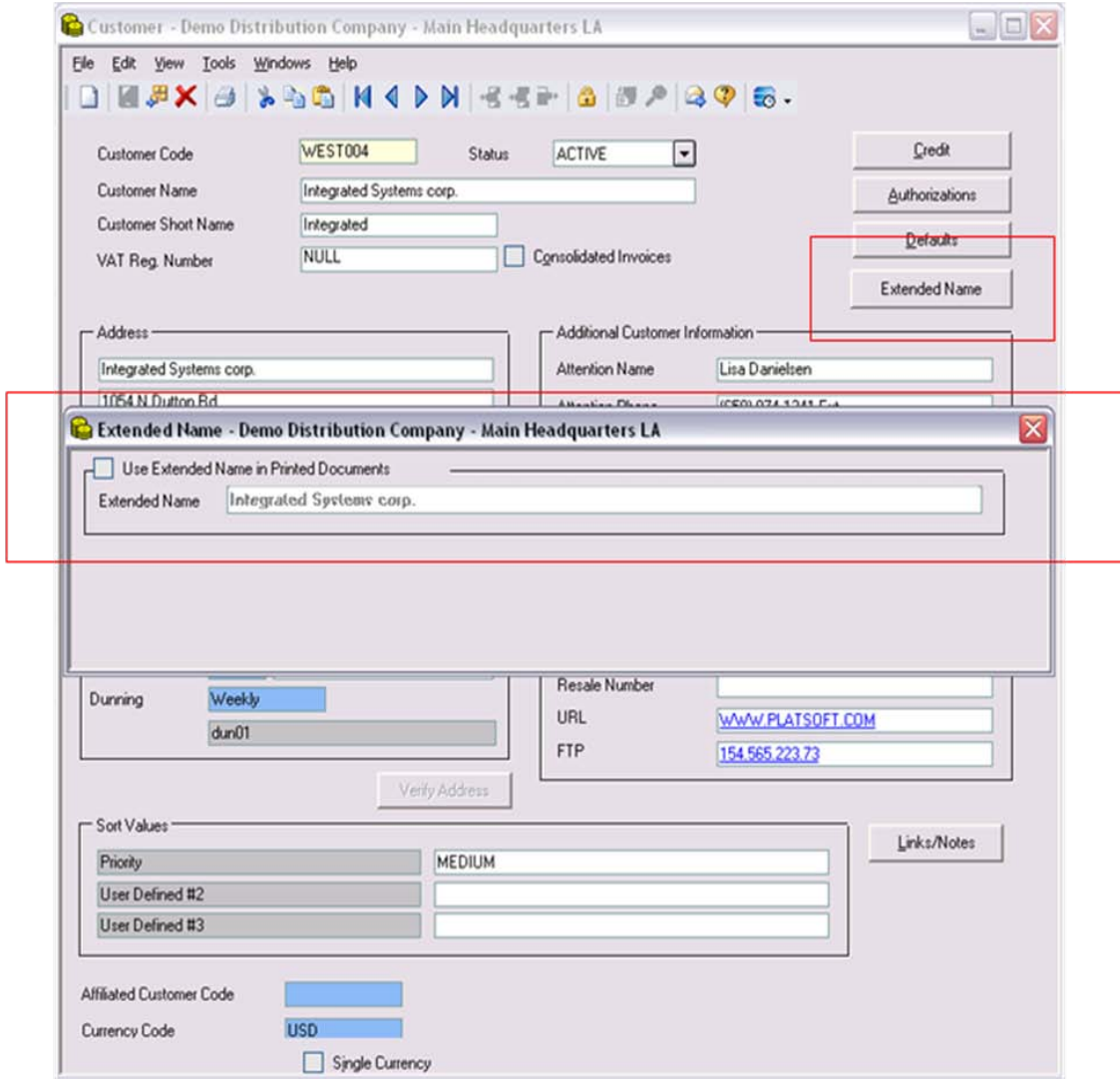
ACCOUNTS RECEIVABLE

Expanded Customer Name fields

Customer Maintenance has a new button, "Extended Name," that opens a dialog box to support a customer name of 120 characters.

It also has a checkbox, "Use Extended Name in Printed Documents," which if when checked uses this extended name on all printed documents such as reports, invoices, and receipts for credit and cash.

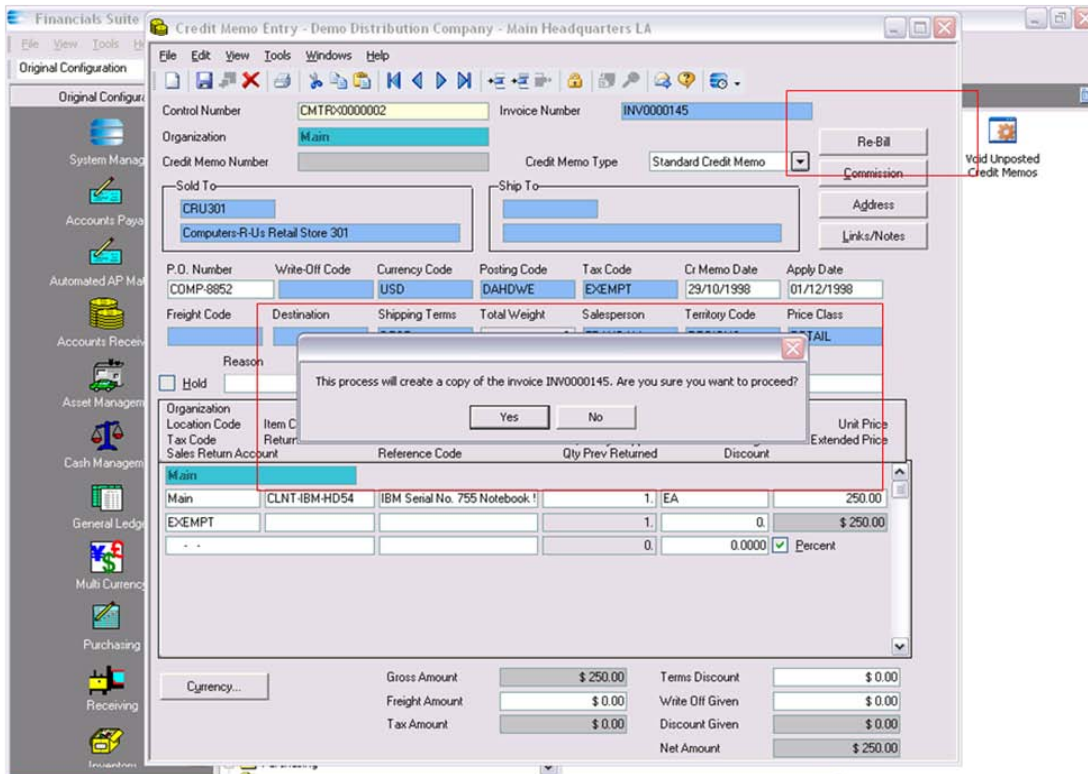
This functionality is also available on the Customer Ship-To form.



Credit and re-bills

The Credit Memo Entry window has a new button, "Re-Bill," which when clicked launches Invoice Entry, with the same values as that of the original invoice.

The original invoice is canceled, and the new unposted invoice has the same information as before. As a result, you spend less time re-entering invoice information.



Credit card authorization security code

The AR Cash Receipt process now accommodates the required Credit Card Verification Value (CVV), the three or four digit security code on the back of the credit card. This accommodation is useful for transactions that require that the customer have actual physical possession of the card.

Note that the CVV is *not* stored in the database, in accordance with the Payment Card Industry Data Security Standard (PCI DSS).

Customer Merge

The Customer Merge functionality is now completely folded into Accounts Receivable. Previously, it was available as custom solution from Professional Services.

Use the Merge Customer window to move multiple customer records into a single, merged customer record. The logic also changes the merged customers to a status of Inactive, to prevent them from having future activity.

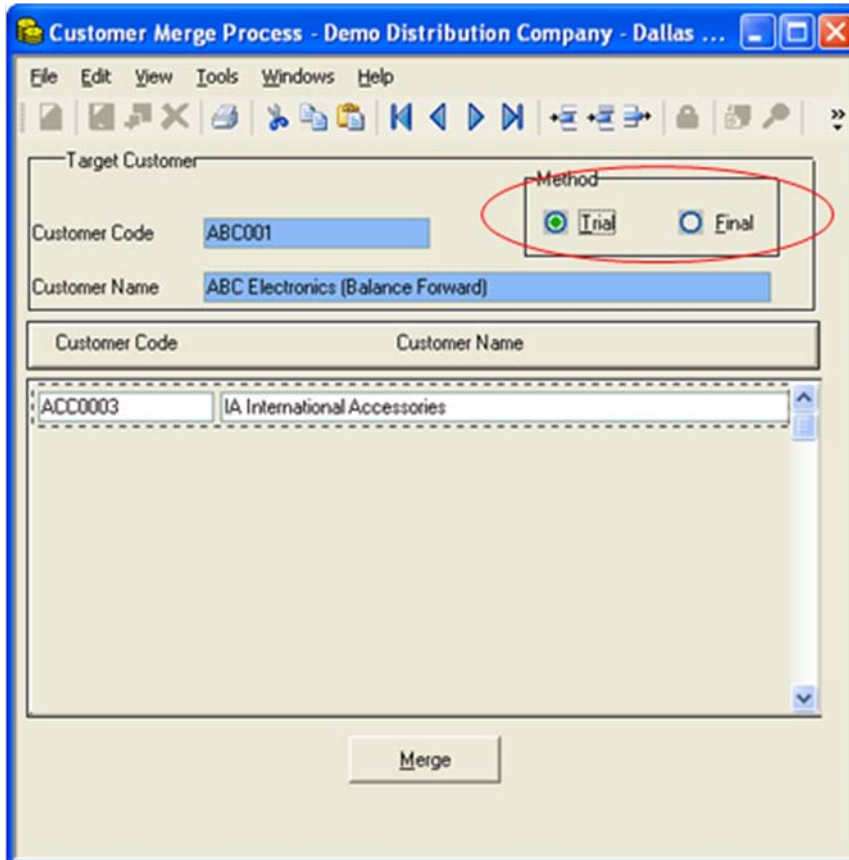
The Customer Merge functionality updates the following information, for transactions posted and unposted:

- Customer-Vendor relationships for netting
- AR National Accounts
- Invoices (sold to)
- Sales Order (sold to, bill to)
- Non AR-Cash Receipts
- Cash Receipts
- Settlements
- Dunning Letters

- Customer
- Ship-To: If the ship-to code is in the old customer record and also the target customer record, the ship-to from the old customer record is lost. If it is in the old record but not in the target customer record, then it is linked to the target customer.
- Shipping (sold-to)

The Status Report shows which tables were affected during the merge, along with most of the statements executed.

The Merge Results Report can be reviewed for the results of every merge process, showing which customers were merged.



Supply Chain Management Enhancements

GENERAL ENHANCEMENTS

Inter-Organization for Supply Chain Management

The purpose of inter-organization processing is to account for transactions between organizations and on behalf of other organizations. The end result is the ability to produce a balance sheet and income statement for each organization with the use of FRx. Organizations are allowed to process AP, AR, GL and Cash Management transactions that affect one or more organizations.

The inter-organization functionality, available already in Financials, is now available also for Supply Chain Management.

Upgrade to Power Builder 11

Supply Chain Management has been upgraded to Power Builder 11. As a result, it is compatible with Windows Vista.

INVENTORY

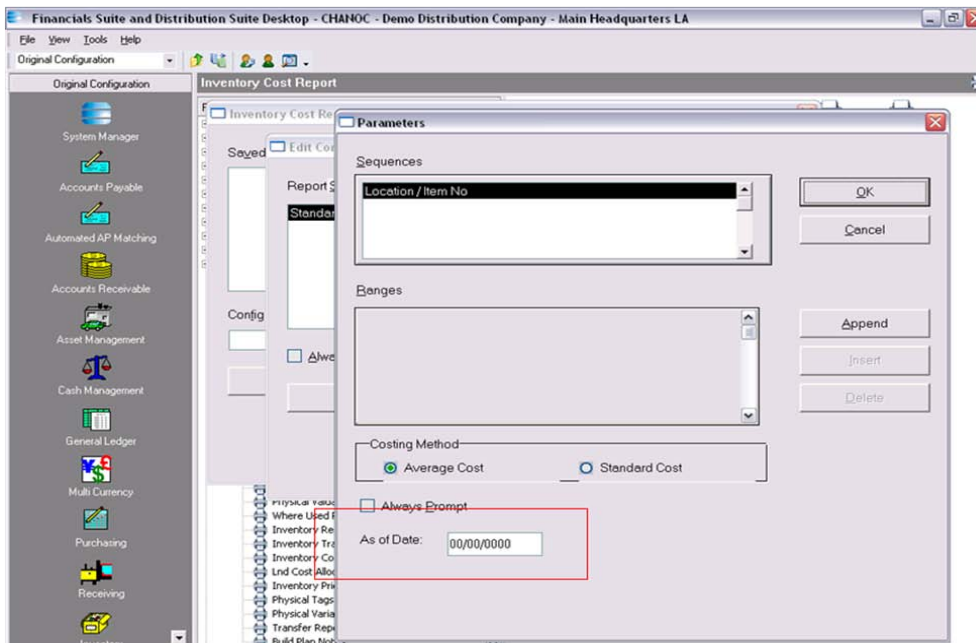
Allow backorder for stock transfers

Backorders are now supported for transfer shipments, to ship a transfer request, in the same way that backorders for sales order shipments are supported.

As Of dating

The Inventory and Inventory Cost Reports now support "as of" date capabilities, so that inventory information can be presented as of a particular date.

If the date is not entered, the current date is used. If the date is entered, the numbers for in-stock, costed-hold, average costs, and standard costs are displayed as they were on that date.



Location pricing

Pricing information at the item level has been incorporated at the location level.

Pricing occurs at three levels: Base, Organization, and Location. The precedence of pricing is: Location, Organization, Base.

If pricing is established for a location for the currency, that pricing is used. Otherwise, Org currency is used, and if no Org, the Base currency is used.

If pricing is not defined for the currency, the same processing is done with the home currency.

Physical inventory apply date

Use a new configuration option to establish whether the physical inventory apply date should match the Inventory Date or the current date. During creation of the physical inventory, the system validates that the configured date, used for the apply date, still belongs to the current SCM period.

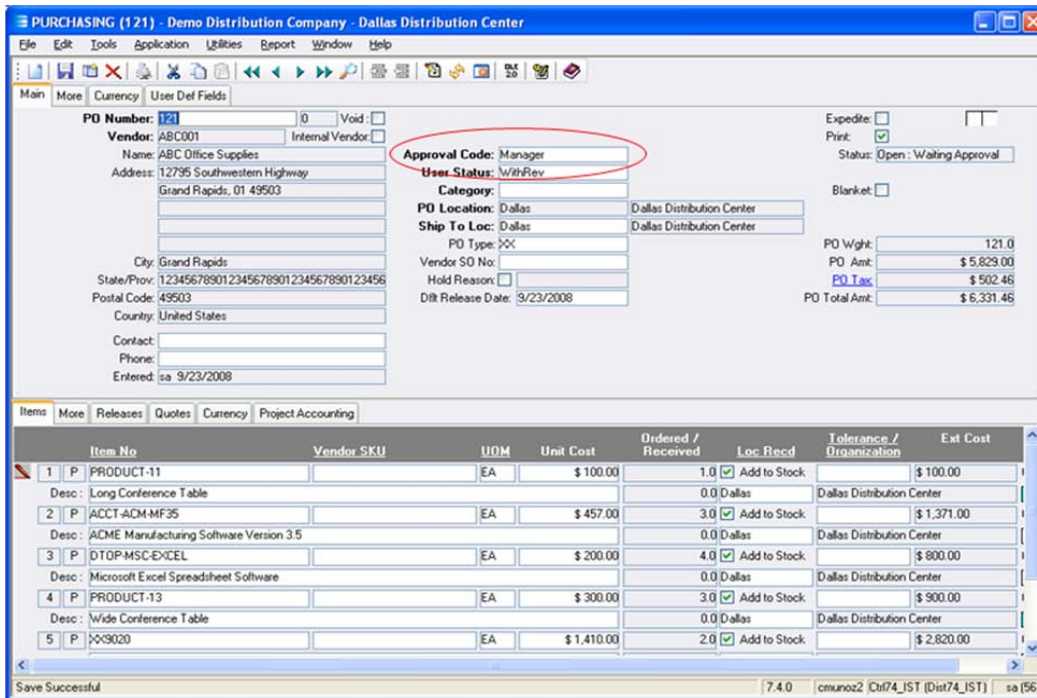
PURCHASE ORDER

PO Approvals

An approval process is now supported. As a result, purchase orders are not printed or received until the proper authority has approved them. The PO approvals follow exactly the same rules and configuration as AP Voucher approvals. That is, the approval levels and users are configured in only one place.

If the new option of Purchase Order (in Name and Options - Approvals) is selected, all new POs are sent to the approval process, including those generated by the Drop Shipment Auto PO process. POs sent by procurement logic are approved, because the procurement logic already approved them.

If the new option is not selected, the process is as before, and the new Approval Code field is disabled.



Voucher number on matching edit list

The Matching Edit list now displays the voucher number. As a result, it is easier to confirm vouchers than running an Explorer query. When the Matching Edit list finishes the save (post) process, each matching record selected is updated with the generated vouching number. Sales Order

Credit card authorization security code

The Sales Order Entry process now accommodates the required Credit Card Verification Value, the three or four digit security code on the back of the credit card. This accommodation is useful for transactions that require that the customer have actual physical possession of the card.

Note that the CVV is *not* stored in the database, in accordance with the Payment Card Industry Data Security Standard (PCI DSS).

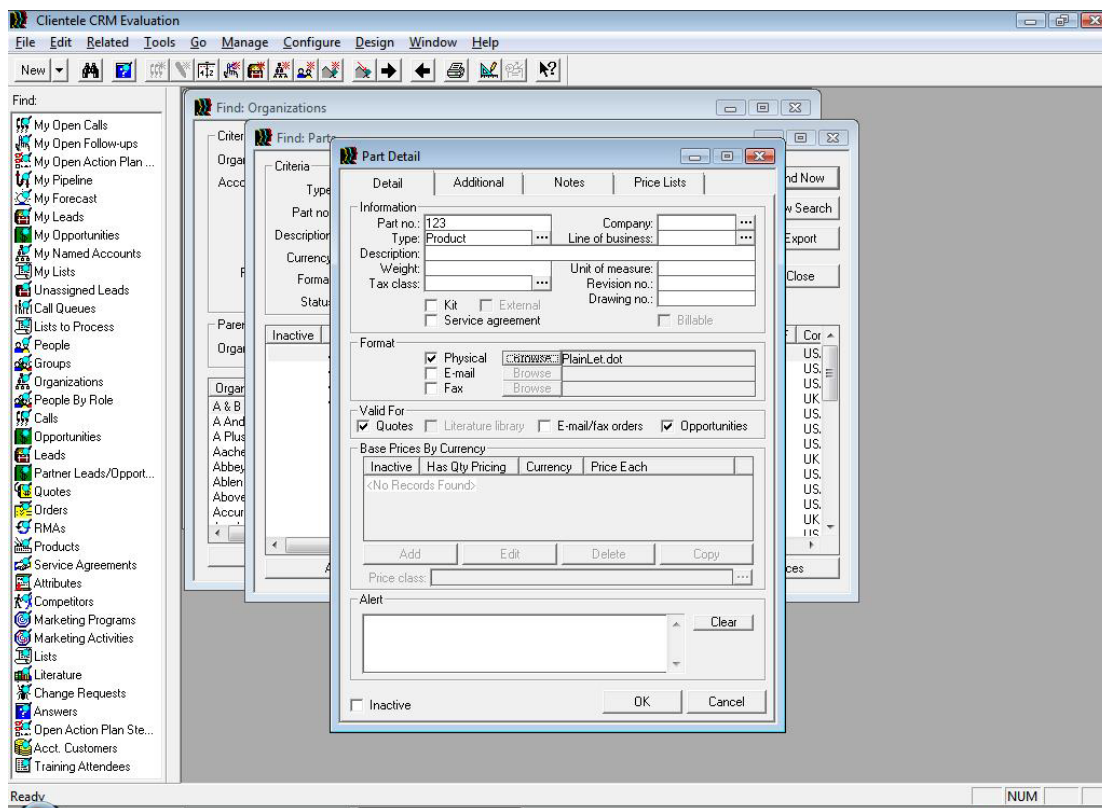
Customer Relationship Management Enhancements

Customer Relationship Management is organized into two main areas: features for sales teams (sales force automation or SFA) and features for support teams (customer support). The application is a mature, robust solution with many features. It is also remarkable in its ease of customization, requiring only modest administrative or programming experience to alter the application to suit particular needs.

SALES FORCE AUTOMATIOTION (SFA)

Alert checkbox and text to an item

Part detail form now has an Alert textbox. Whatever is typed in the Alert textbox appears as a pop-up message when the part is accessed.

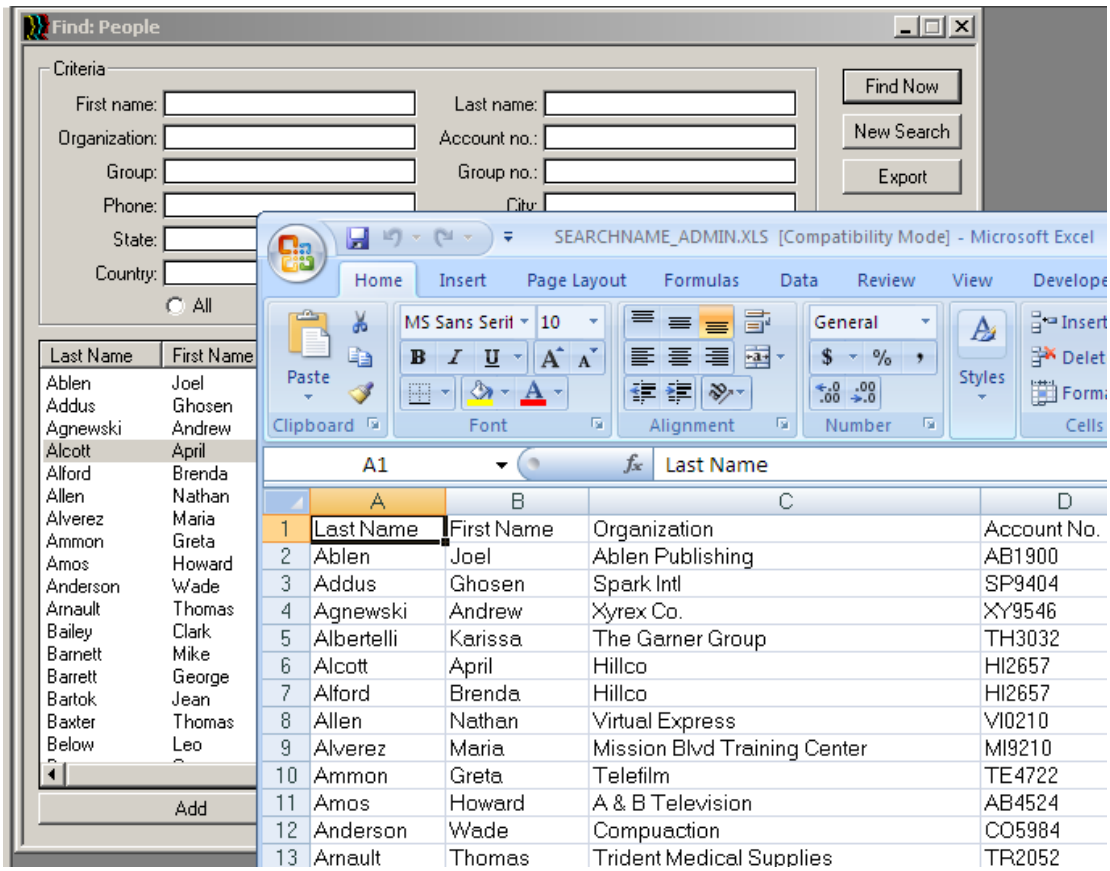


UK address style support

With this new release support passing the address in UK style as well US style in the interface from CRM to Supply Chain Management (Enterprise).

Export grids to Excel

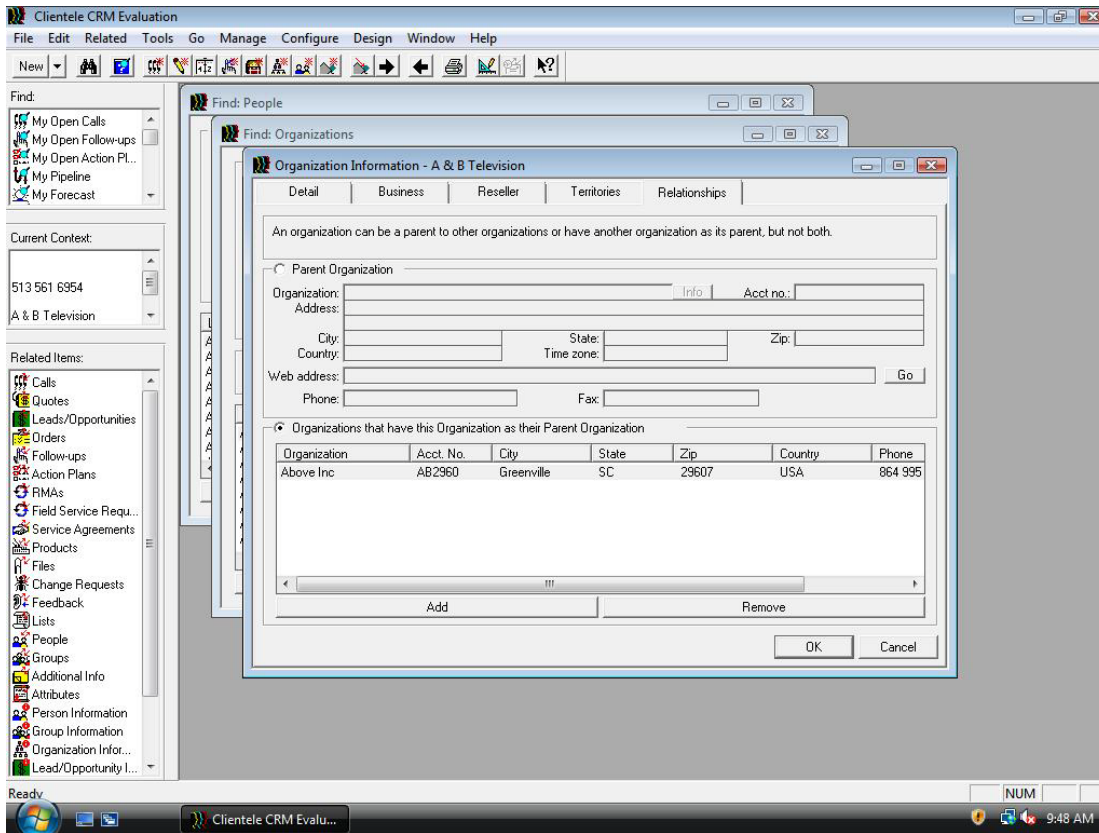
Find forms now have an Export button. The Find form can be used to filter and search for a set of results as always. Now click the Export button to export the result set (with column headings) to Microsoft Excel.



Parent-child organization relationships in CRM

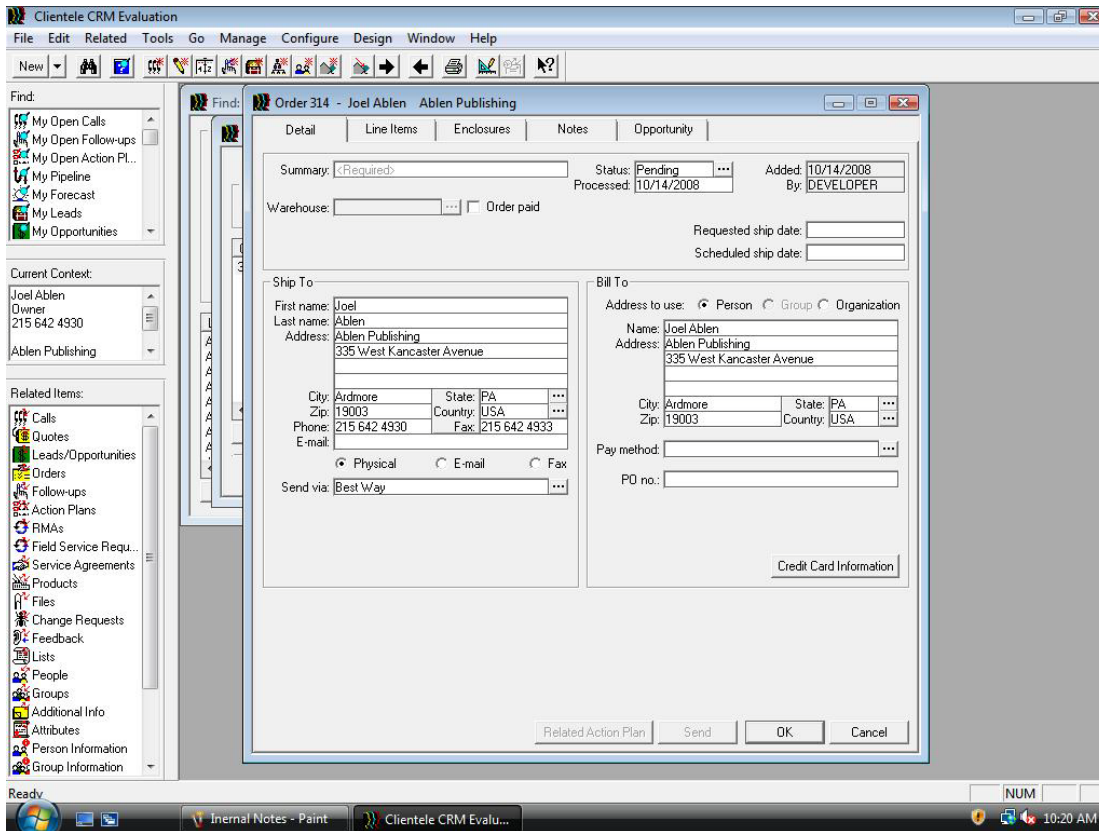
The Relationships tab allows indication of whether an organization has a parent organization or is the parent organization in which case all child organizations are listed.

This information is not maintained if the Promote, Demote or Merge Duplicates operations are taken.



Multiple shipping addresses on quotes and orders

If you are integrated with a back office, you can set the Same Ship To For All Items In Company system option to false to enable the choosing of a quote line item ship to address.

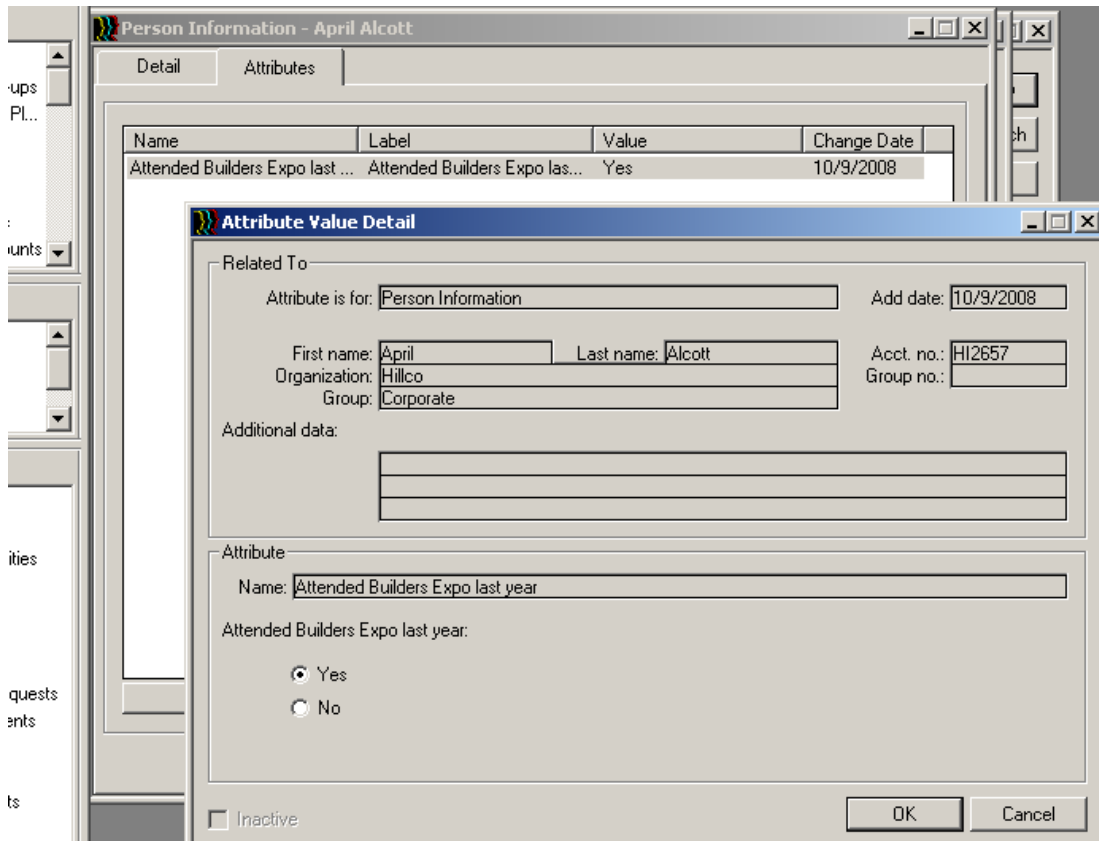


Security enhancements and service packs for Office

Some included enhancement to make it smart enough to the MSOffice integration when installing it Services Packs or when upgrading from one version of Office to a newer one with Clientele is compatible with.

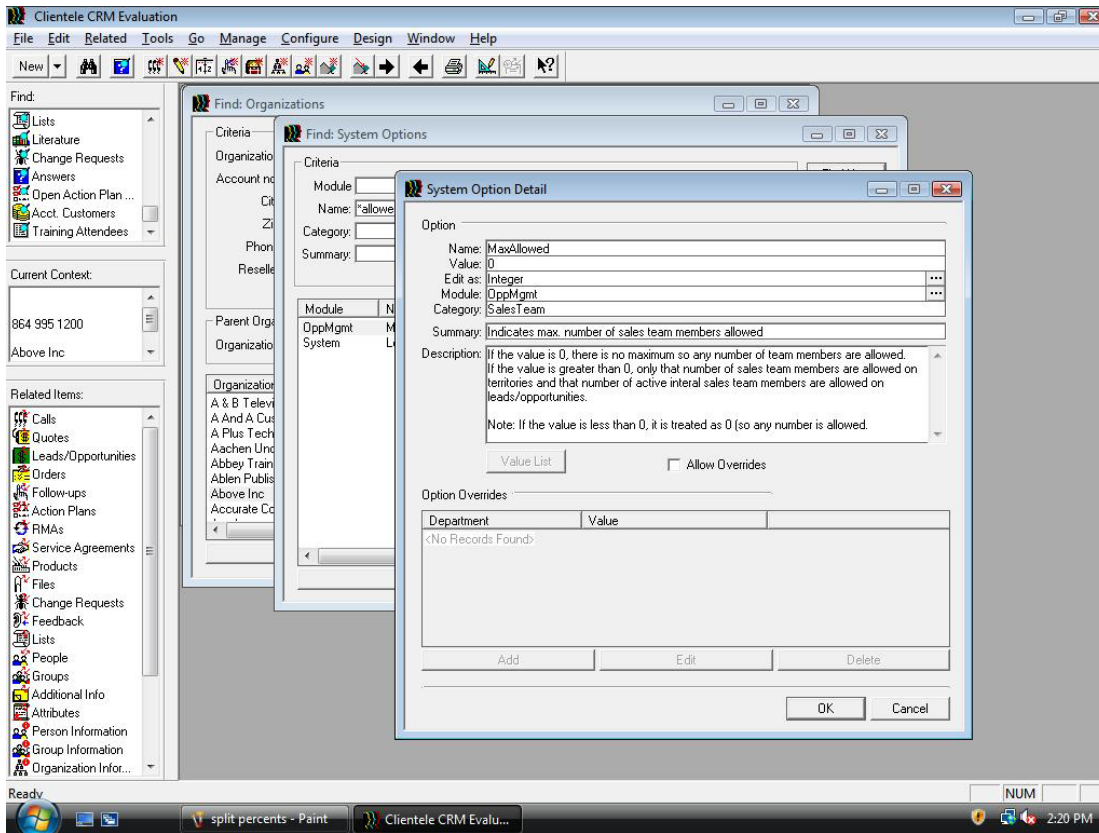
Custom attributes for an organization

Attributes offer a quick way to add a field to certain forms, shortcutting the longer process normally involved in adding a field. Attributes are displayed on their own tab on forms and can be searched for on the Find Attributes form. Only a subset of forms has been enabled for attributes.



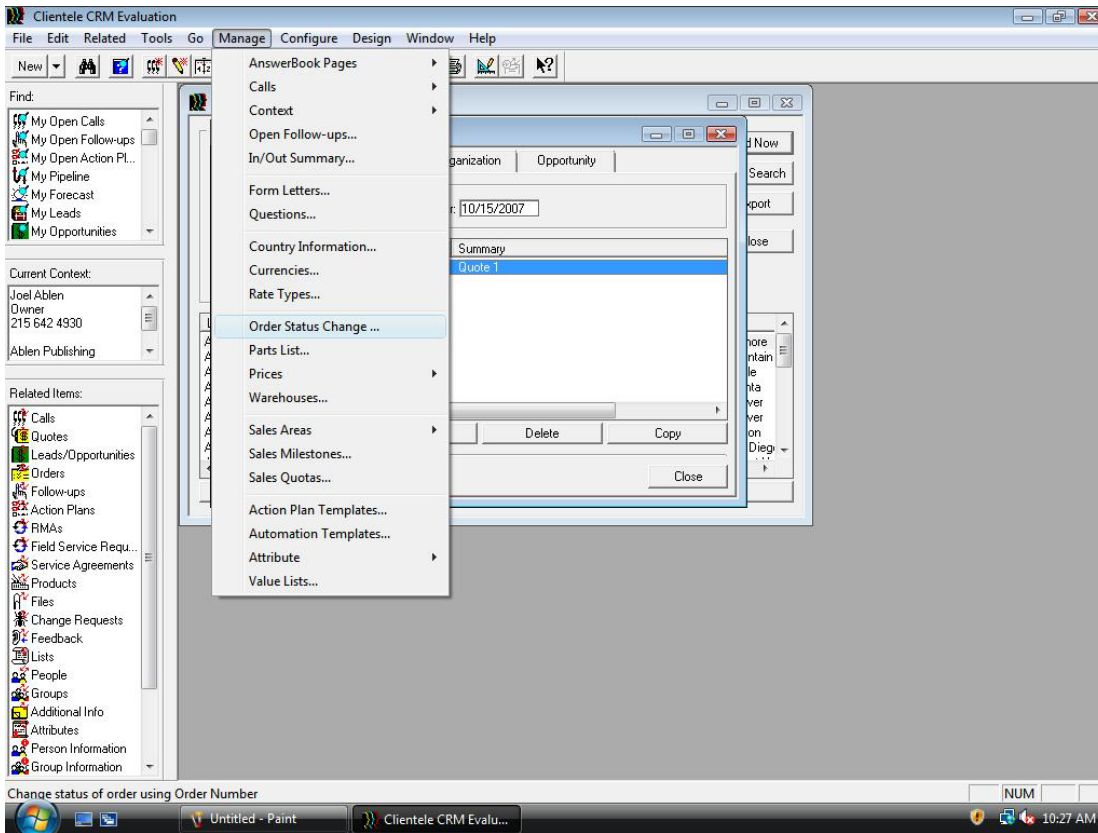
Limit team member & split percents on territories and orders

This new release allows limiting the number of sales team members on territories and leads/opportunities. Also allows system to require the total split percent of all team members to add up to 100%.



Order Status Change to handle integration

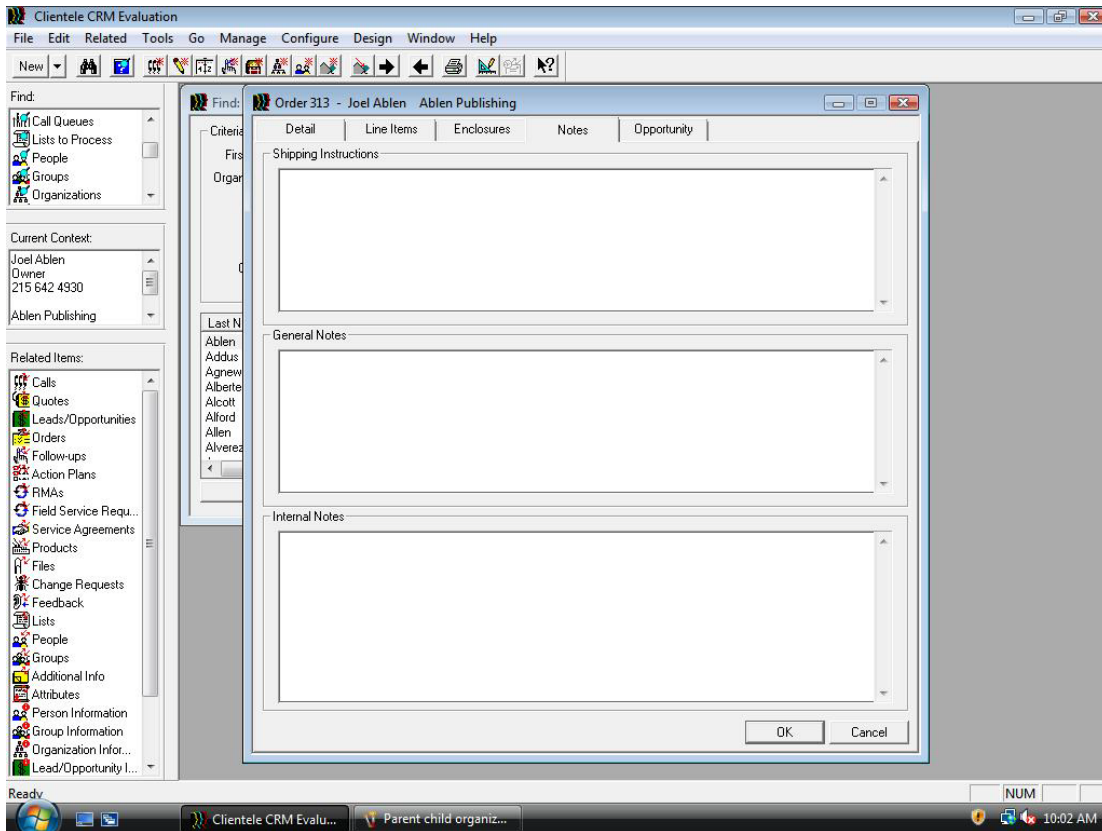
The user is allowed to change the status of an order. Even if the integration is active the integration status field is not changed.



CUSTOMER SUPPORT

Internal Notes

Front Office has a new Internal Notes field at the Header and Line level that do not integrate to the Back Office, but are still available after the order has integrated.



Truncate data to match Enterprise field lengths

Reducing integration error by truncating the data is the result to allow the users modifying data within Front Office before it integrates.

Tighter Integration Controls

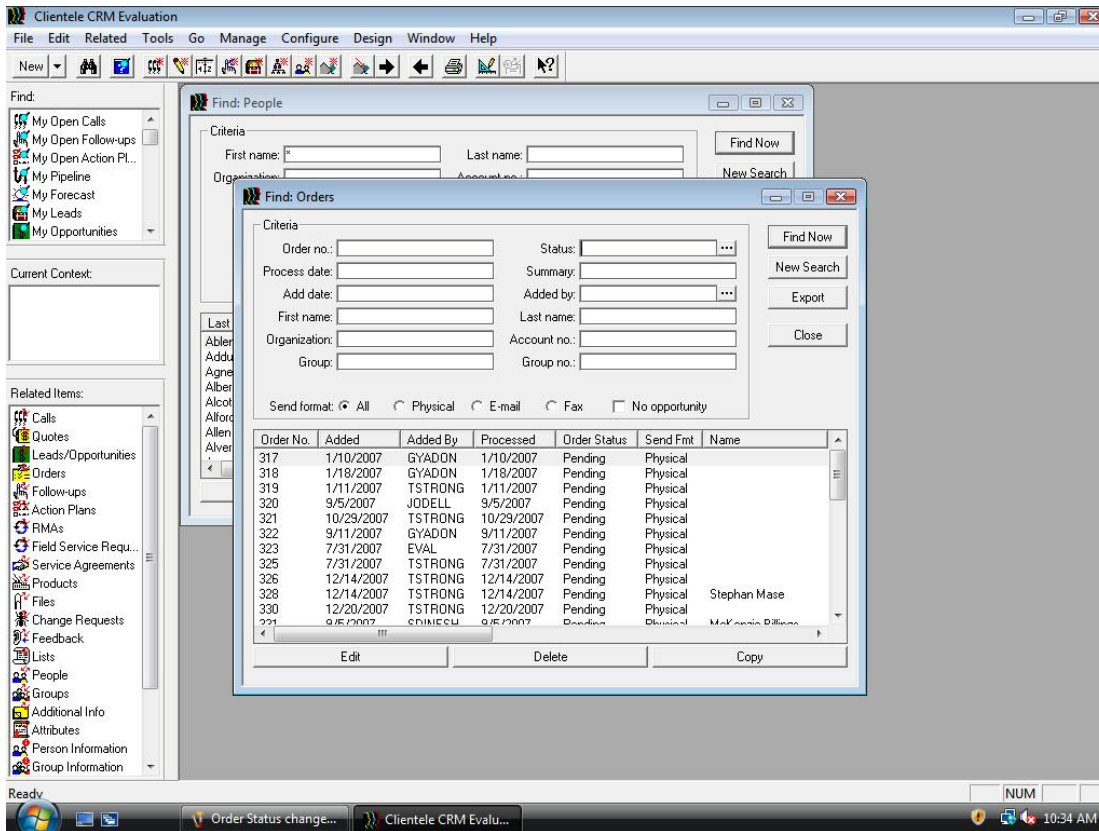
This version disables integrated value lists if no data is sent. Not all back office systems send data for all the integrated value lists.

Electronic Orders and Templates

When the integration is active, the user can create electronic orders (e.g., fax and email) and orders from templates.

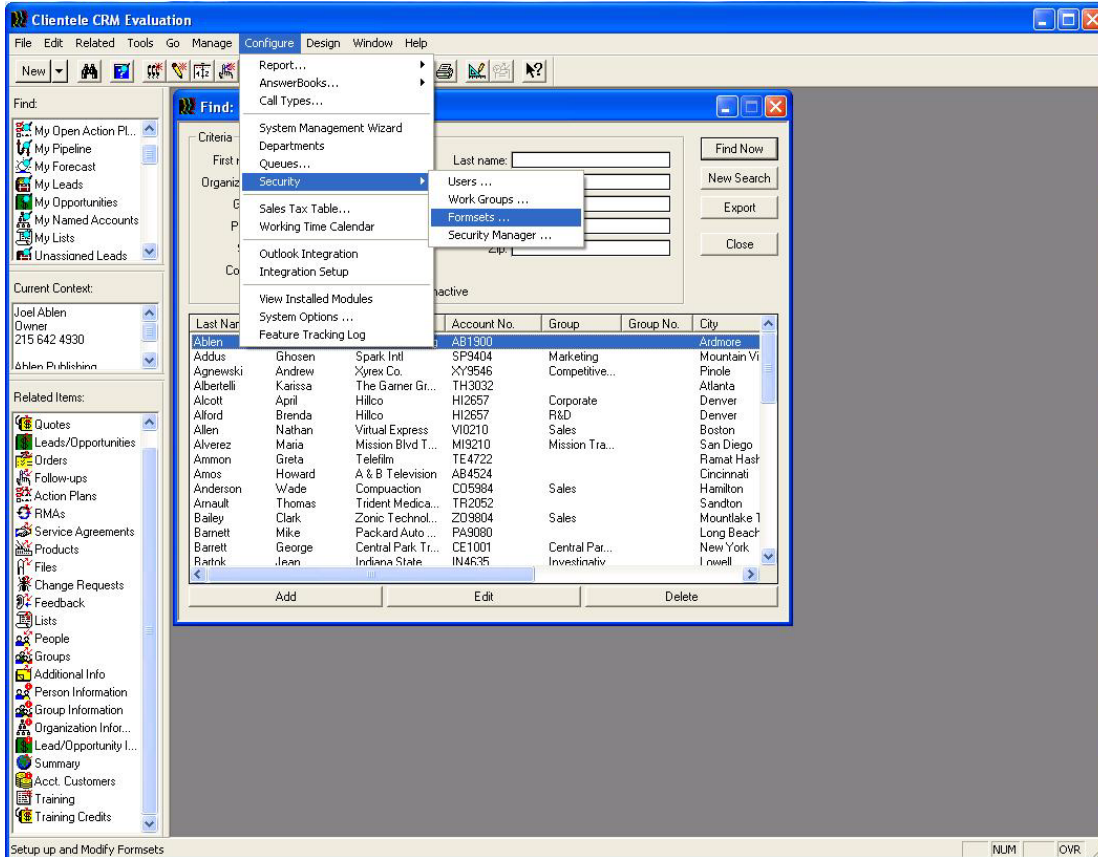
Additional order searching

A new search form lets users search for processed orders and order shipments



Miscellaneous Account Features

Better visualization because the user has separate accounts address security, additional search criteria and display columns.



Don't create "Ship To Default" if same as Bill To

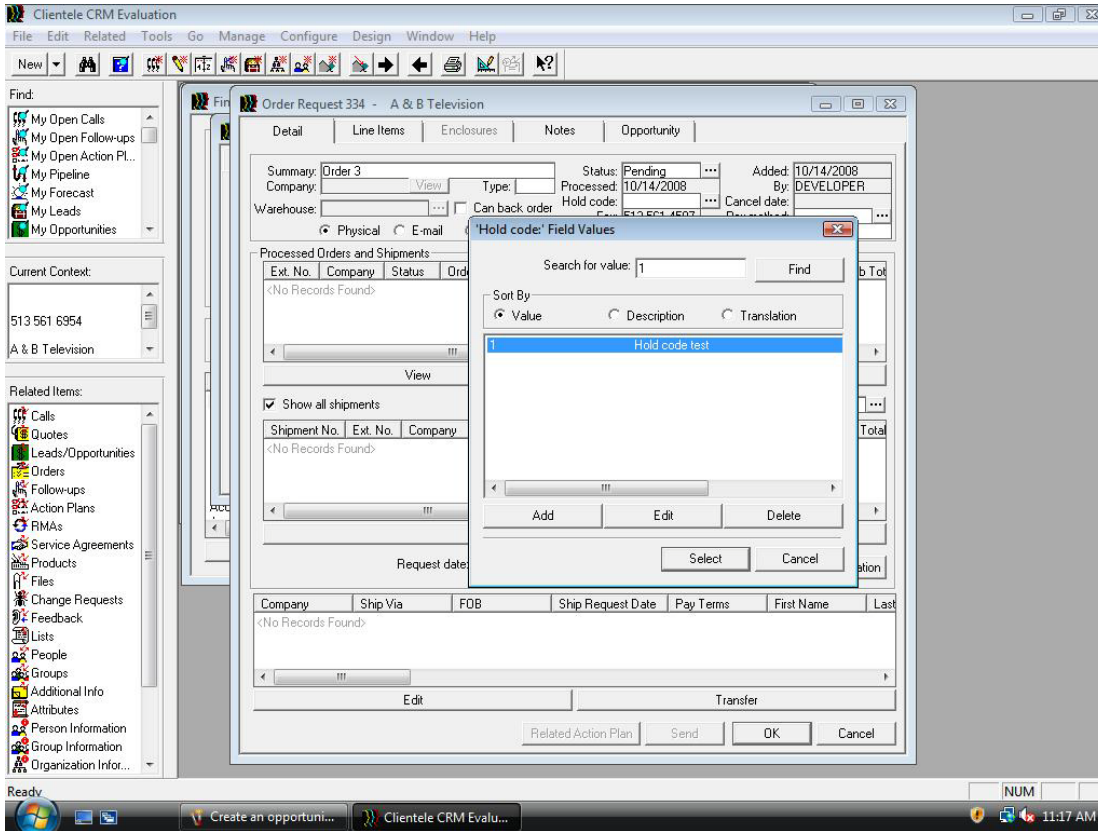
With this new release the system only create the "Ship to Default" account address record when creating an account customer from an order, if the address is different than the Bill To address as it creates a duplicate in the Enterprise systems.

Connector

New enhancements to improve synchronizing process for Bill To/Sold to and Groups/Ship To account address relationships.

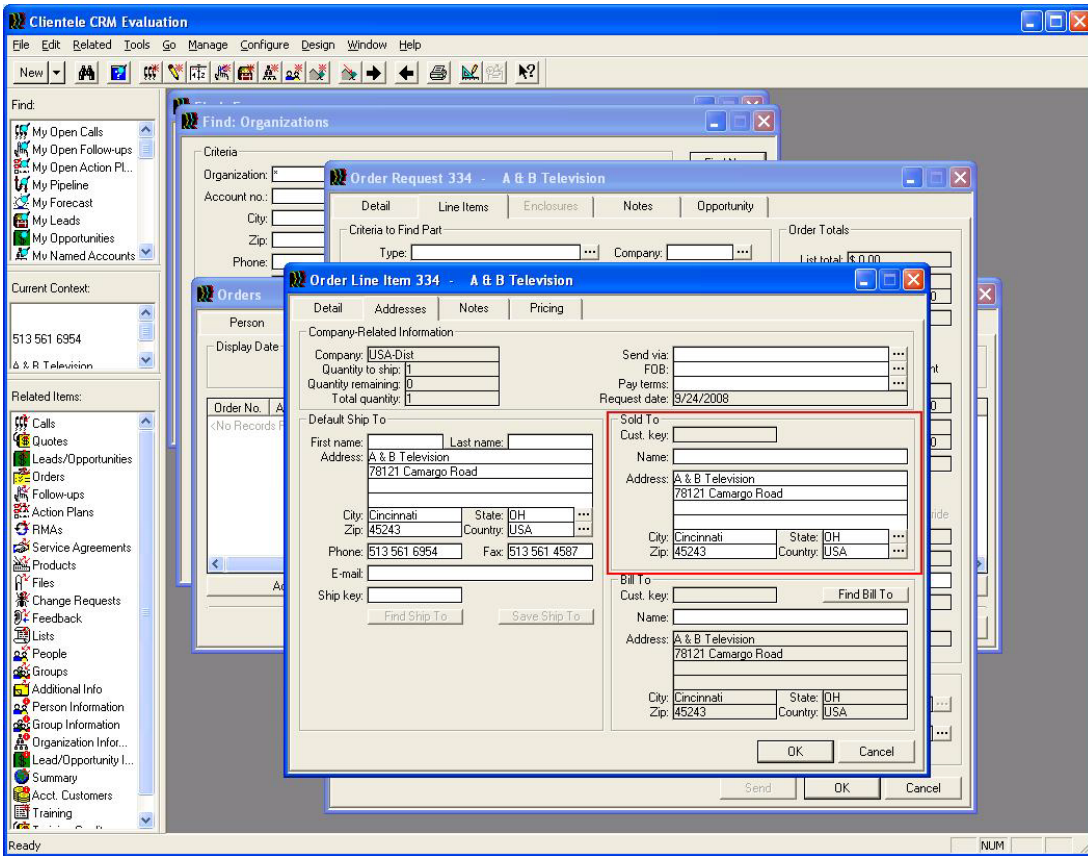
Hold Codes

Allow the Front Office user to purposely submit an order to the Enterprise on a specific hold code. FO user will specify a hold code on the FO order. When integrated the order will be added to the Enterprise it will be put on that hold. If a hold code sent is not a valid hold code, the order will be put on the default hold code.



Sold To Definitions

Link to Sold To customer in CRM to Organizations so Orders will be tracked against Sold To customers instead of Bill To customer.

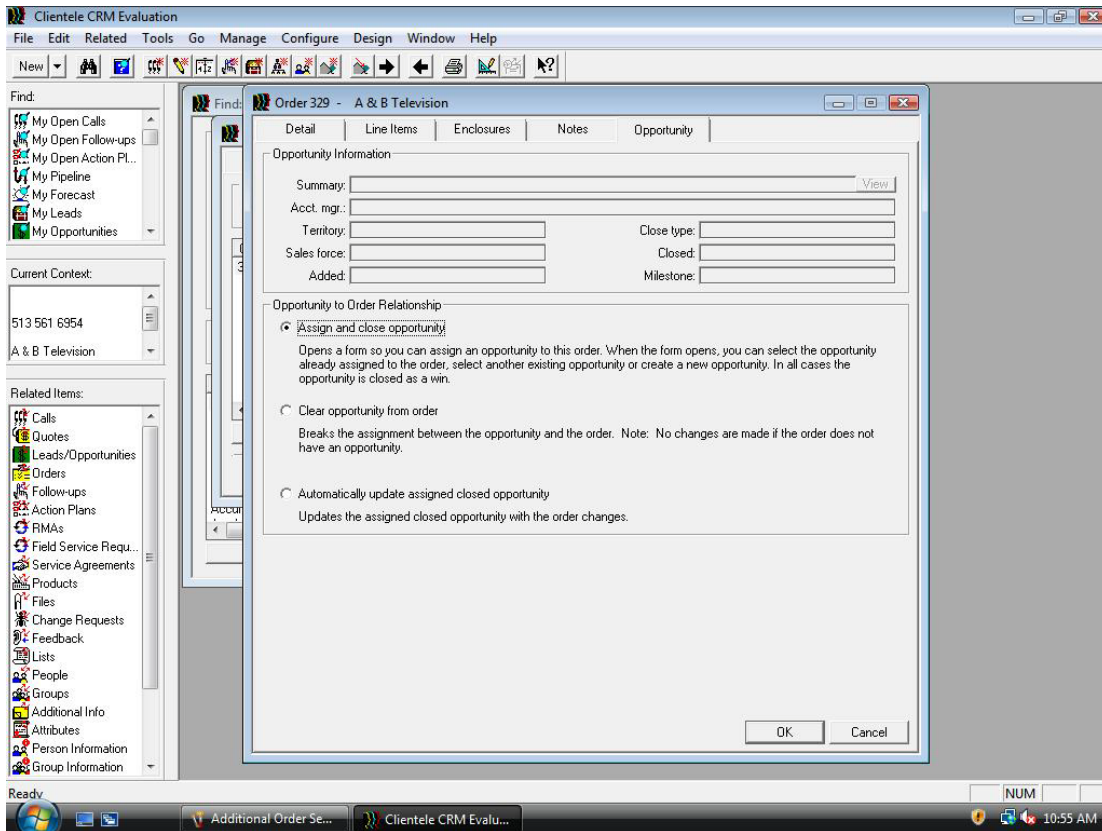


Ship To addresses as groups

The user has the option to create and tie Ship To addresses to Groups in Front Office so calls and orders can be tracked at the Ship To level.

Create an opportunity for the order or not

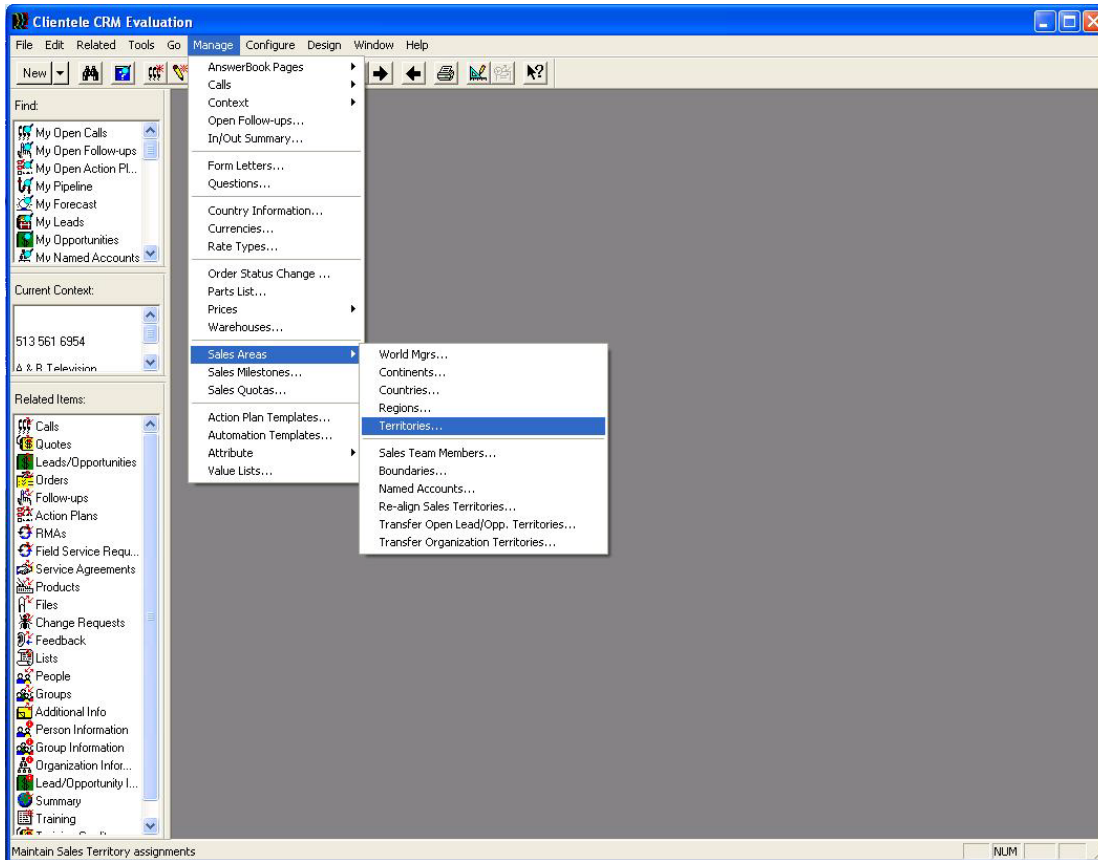
The Enterprise's users are allowed to specify when entering an order if an opportunity should be created in the Front Office system when the order integrates.



Synchronizing Territories assigned to customers

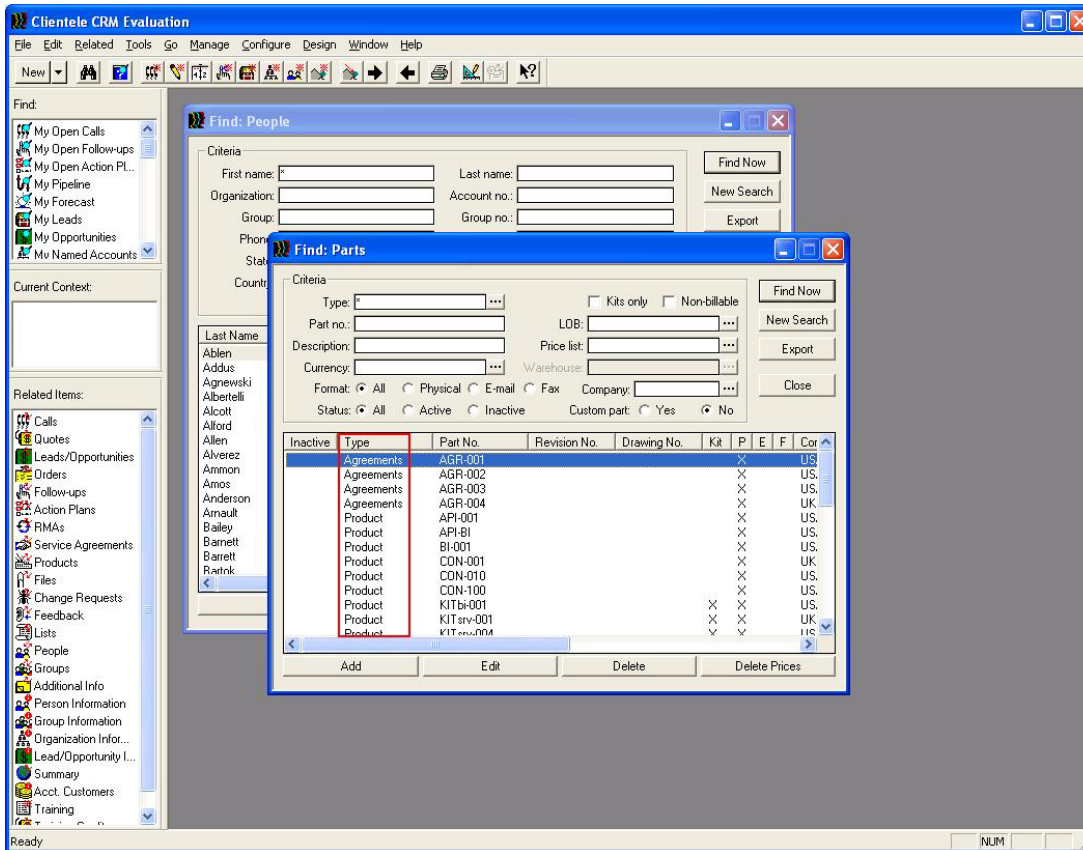
You can assign opportunities and leads to different sales territories using the Open Leads or Opportunities Territory Transfer form. You can also assign unassigned leads to sales territories.

You can use the auto assignment rules associated with a sales force or manually select the destination territory. You can transfer multiple items at a time or one at a time as desired.



Change part integration to NOT hard code part type of 'Product'

Customers have the ability to have the Enterprise part type in front office. Currently, integrated parts are all going across with a part type of 'Product'.

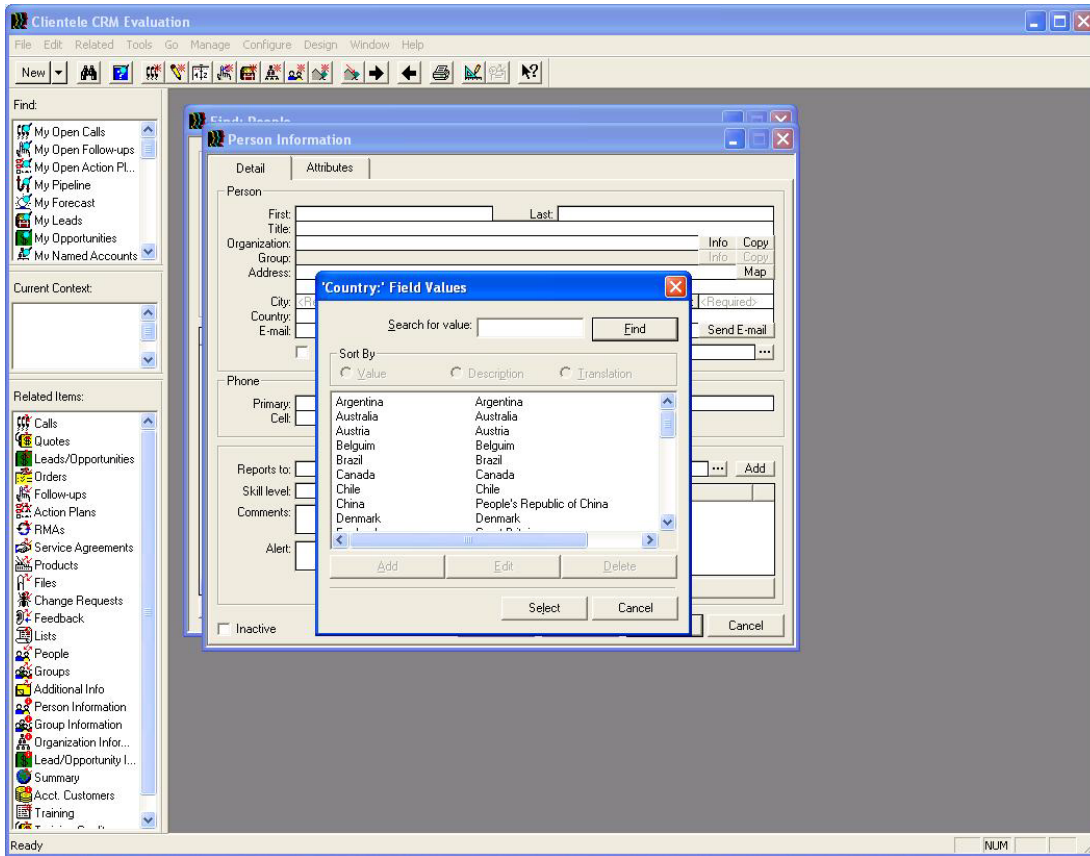


Keeping PGO & Account Addresses in Synchronize

Customers have to maintain address changes in 2 places each time. This can cause addresses to get out of sync.

Country Integration

This release uses country code in the same way as country name in the integration with Epicor Enterprise and CRM



Turn off Contact Integration

Front Office contact functionality on accounting addresses is hidden and just the contact name is integrated on the accounting address Attention field. For Enterprise, contacts are integrated as they currently do.

Clear Account Customer Comments

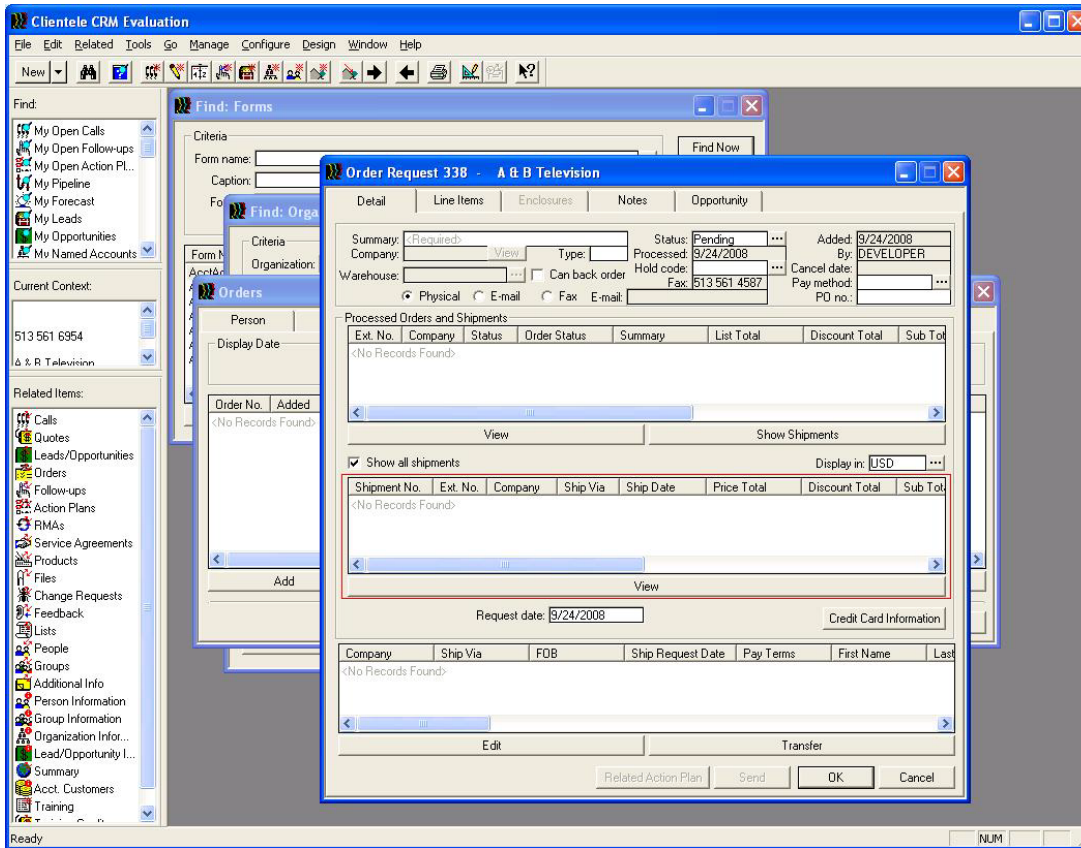
When a customer in Enterprise has comments and then the comments are later removed, Front Office will clear the comments too.

Remove hard-coded "0" for Account Customer Type

This release allows having Type as an optional value so it will be send to null if there is not value sent.

Multiple tracking numbers per shipment

Great functionality is to allow multiple shippers tracking numbers per shipment.



Tools Enhancements

SYSTEM MANAGER

Group and User Permissions

The table smperm has been replaced by smuserperm. A new view has been created with the name smperm. Any customizations done to smperm should be done with the new table.

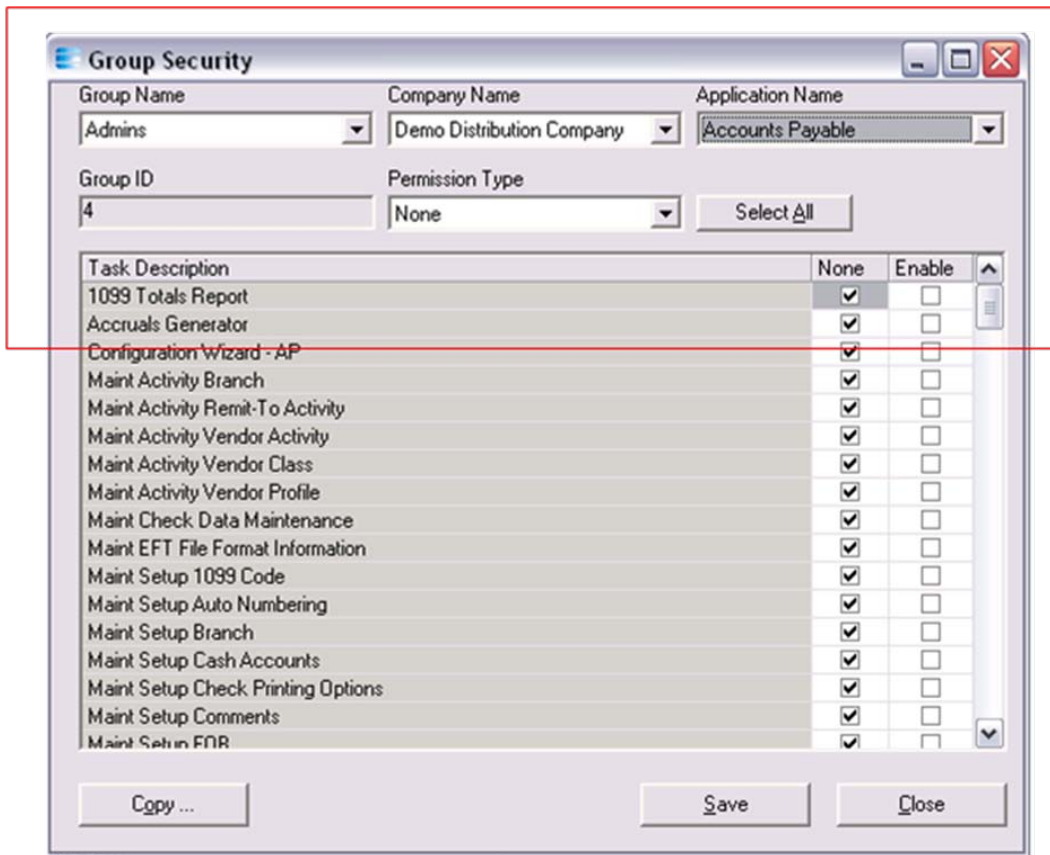
The purpose of the new table is to store user permissions independently from group permissions. As a result, removing permissions from a group will also remove permissions from users within the group, on a user level.

EXPLORER

Explorer views for security settings

New explorer views are now available to show the relationship between a user and a menu option. You can now review whether the right was granted to a user at the user level, or granted to the user at a group level.

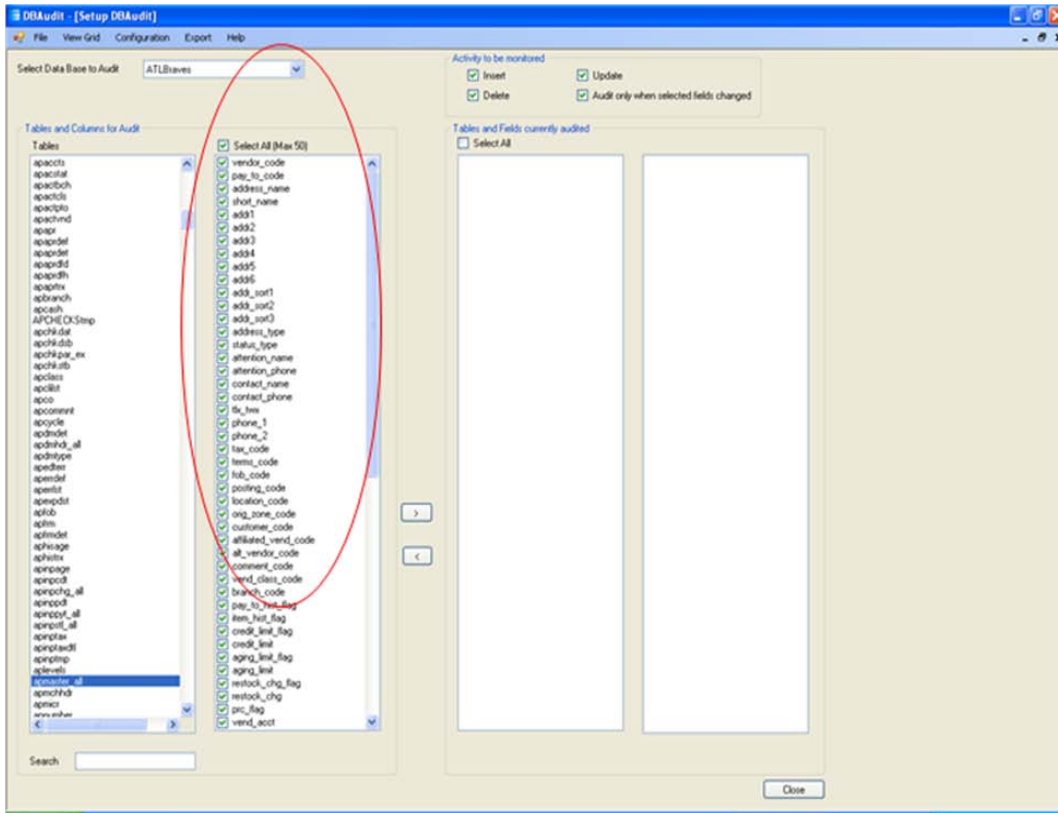
The Explorer - User Security View shows information and applications that the user can access, and the way the rights were assigned (User Security or Group Security). It also displays company information.



DBAUDIT

Increase columns per table

DBAudit can now handle 50 columns per table.



Additional Information

Compatibility

Epicor Enterprise is compatible with the following products:

Financial Suite Enhancements	Microsoft FRx 6.7
	Active Planner 7.3.6b
	Advanced Allocations 7.3.6b
	Customer Relationship Management 7.4
	Extensions 7.4 <ul style="list-style-type: none"> • Credit and Collections • Deferred Revenue Accounting • Maintenance Renewal • Average Daily Balance • Import Manager • Lockbox • Royalties • Promotions & Rebates
	Customization Workbench 7.4
	DecisionStore 7.3.6
	Altec <i>doc-link</i> ™ 2.5
	EAI 7.4
	Epicor for Service Enterprise 8.1.1 SP5
	Portal 9.0
	Hospitality Cash and Sales 7.4
	Hospitality Food Costing 7.4
	Integration Hub 7.4
	Procurement 7.3.6
	Supply Chain Execution 7.4
	Supply Chain Management 7.4
	UltiPro Workforce Management 8.0
	Information Worker 9.0
	Chargebacks 7.4
Supply Chain Management	Customer Relationship Management 7.4
	Customization Workbench 7.4
	DecisionStore 7.3.6
	Altec <i>doc-link</i> ™ 2.5
	EAI 7.4
	Portal 9.0
	Extensions 7.4 <ul style="list-style-type: none"> • Credit and Collections

	<ul style="list-style-type: none"> • Deferred Revenue Accounting • Maintenance Renewal • Average Daily Balance • Import Manager • Lockbox • Royalties • Promotions & Rebates
	Financial Management 7.4
	Integration Hub 7.4
	Procurement 7.3.6
	Supply Chain Execution 7.4
	SmartForecasts 6.0
	Star Landed Cost 7.3.5
Supply Chain Execution	Financial Management 7.4
	Loftware 9.0
	Pragma 6.0
	Precise POS 8.1
	SCM Distribution 7.4
	Star Landed Cost 7.3.5
CRM	Financial Management 7.4
	SCM Distribution 7.4
	Integration Hub 7.4
	Information Worker 9.0

For System Requirements, please access consult the [Compatibility Matrix](#) on [EPICweb](#).

Languages

Enterprise 7.4 is available in English (US).

Upgrades

The upgrade paths supported for this release are from versions 7.3, 7.3.5 and 7.3.6. It can also accommodate an upgrade from any service pack associated with those versions. This is applicable for DBUpdate too.

Technical Support

Overview

Epicor's commitment to deliver high quality business solutions means that our customers depend not only on our applications, but also on our experience in supporting those solutions around the world. Epicor stands behind all of its products with a world-class technical support organization, capable of serving our global customer base.

We are able to offer this support through our worldwide support centers located in the US, UK, Mexico, Australia, Hungary, Malaysia and other countries. Contact information for each support center is listed on listed on the EPICWEB, the Epicor Customer and Partner Web site: epicweb.epicor.com.

Because midmarket business solutions represent solid, long-term partnerships with our customers, we've developed high standards of service and support. Epicor's support analysts are not only specialists on our product, but also understand the ongoing business needs of successful system operation. Our goal is to continue to fine-tune and improve our support systems to keep your organization as productive as possible.



ADVANCED TECHNOLOGY

Epicor Technical Support uses advanced telecommunications technology to ensure you connect with the right person quickly to resolve your application related issues. When you call into any of our support centers, our Automatic Call Distribution System quickly routes your call to the appropriate support analyst. You also benefit from Epicor's own award-winning customer relationship management software, Epicor Clientele, which gives our analysts instant access to your records and our extensive knowledge base of information, so they can quickly provide you with answers and solutions. Epicor Technical Support also utilizes the latest technology in troubleshooting tools such as WebEx™ and Identify® AppSight™ BlackBox to resolve tough customer issues in a timely manner.

Note: Services are provided as available and might be limited for certain products provided by Epicor or its third-party partners.

EPICWEB

Self-service support via the Internet can be challenging. That's why Epicor has designed a specific website for customer and partner communication. EPICWEB (epicweb.epicor.com) is our state-of-the-art customer and partner portal. Based on Microsoft SharePoint technology, this portal is the central point of contact between Epicor and our customers and partners.

Some key benefits of this portal site include:

Patch management system -- now you can be notified when a new patch is available for your product.

The ability to customize your EPICWEB experience -- see only the information you want to see.

Manage your customer newsletter and other corporate communication subscriptions from one location.

Easy password and account management -- allows customers to manage their account access on EPICWEB.

For a complete list of benefits and features, and to setup your own account, go to <http://www.epicor.com/security/passwordmanager.aspx>.

KNOWLEDGE BASE

Our knowledge base of technical information is available to all support customers over the Internet. We put this wealth of information at your fingertips by leveraging advanced indexing and search technology to provide a powerful and easy to use Web-based resource. This is the place to get up-to-the-minute technical information about our products and the environments and platforms in which they run.

CUSTOMER PORTAL

Many other support services are available using the Epicor customer portal (epicweb.epicor.com). Customers can review their account information including their currently supported products and update their contact information. Customers can also submit support calls, view support call status and update their outstanding calls directly from their browser.

PRODUCT DOWNLOADS

Product patches and service packs are regularly published to EPICWEB where they are available for download. Our knowledge base of technical information is available to all support customers over the Internet. We put this wealth of information at your fingertips by leveraging advanced indexing and search technology to provide a powerful and easy to use Web-based knowledge base. This is the place to get up to the minute technical information about our products and the environments and platforms they interact with.

Optional Technical Support Services Offerings

EXTENDED SUPPORT HOURS

As part of Epicor Technical Support's ongoing commitment to providing world class service, we provide 5x24 Technical Support. Epicor's 5x24 Support covers the hours 6pm Sunday – 6pm Friday (Pacific Time). Epicor's 5x24 support policy also includes limited Technical Support Coverage for the Standard US/Epicor Holidays. Customers can submit calls at anytime via the Epicor Customer Portal.

EXPANDED WEEKEND COVERAGE (BY APPOINTMENT ONLY)

Epicor's Technical Support realizes that many customers would like to contract for additional support coverage for specific planned system events, like upgrades, which fall outside the normal business weekday support coverage. For a nominal additional fee, we can arrange for you to have your own personal support contact over most any weekend as long as this is scheduled in advance.

eLEARNING

Epicor Technical Support also offers Web-based eLearning training sessions. eLearning consists of prerecorded Web-based training sessions that cover key topics on Epicor Software. These topics are used by our customers to stay up to speed on the latest Epicor has to offer. eLearning enables Epicor customers to keep their staff up-to-date on the latest software features with little or no down time. These sessions provide Epicor's customers with a flexible training option without incurring the cost of class room training. New topics are added monthly.

Epicor Technical Support has extended its traditional online training courses to include low-cost individualized Web training sessions for our customers.

Consulting Services

Overview

Epicor's Consulting Services organization helps companies implement a complete enterprise software solution, quickly and cost-effectively. By coupling its product suite with a large, well-seasoned Consulting Services organization, Epicor makes implementing enterprise applications simpler by providing a single-stop solution for all customer needs.

In addition to Epicor's own professional services consultants, we partner with many Value-Added Resellers (VARs). VARs are certified on Epicor products and even offer specialized implementation services for geographic markets or specific sub-vertical markets.

Implementation Support

To help you achieve successful, live operation as quickly and as productively as possible, Epicor's consulting services team employs an integrated consulting approach consisting of several fundamental principles.

TECHNICAL AND FUNCTIONAL EXPERTISE

The basis of our consulting success is a robust knowledge base concerning not only our products and how they function, but also how you can utilize them most effectively to maximize the return on your investment. Our consulting organization is staffed with technical professionals certified in a variety of technologies, and applications experts who have backgrounds in the industries we serve.

Consultants work with you to analyze your needs, design the system, explain the functional and technical details of system processes, troubleshoot implementation issues, and concurrently, transfer our extensive knowledge to you.



CUSTOMER SOLUTIONS

Epicor's Professional Services organization has unmatched experience in implementing solutions that span customer relationship management, supplier relationship management, distribution, financial accounting, and enterprise services automation. The organization boasts a proven track record with thousands of successful implementations around the world.

Because Epicor is a leading enterprise application provider in the midmarket offering its own easy-to-implement, cost-effective solutions; Epicor's Professional Services organization can deliver tangible business results faster and more efficiently.

PROVEN IMPLEMENTATION METHODOLOGY

Our Signature Methodology is based on years of field experience implementing our products in thousands of organizations and provides a compilation of approaches, instructions, techniques, templates and sample deliverables to facilitate implementation projects. The methodology acknowledges the architecture, technology, and personnel requirements for a successful implementation. It also recognizes the requirements for success and increases the chances of quickly and painlessly reaching implementation goals and objectives. It is also highly customizable to each customer's specific requirements, timetables, and resources.

Signature is about managing the partnership we have with our clients, to deliver successful implementations. It allows Epicor to provide consistent, client-focused implementations.

As a highly structured, proven implementation methodology, Signature guides you and your company through a four-step process, from an in-depth analysis of your business requirements, all the way to the hand over, quickly enabling your company to begin using your Epicor solution in its day-to-day operations.

For more information on Signature, contact your Epicor consultant.

UPGRADE SERVICES

Epicor Consulting offers complete upgrade services. By enlisting services from the consulting team, you will have access to the experiences of many upgrades. For example, when upgrading from Platinum SQL 4.2a version to subsequent versions of Epicor Enterprise, the Epicor consulting team can help you understand the extensive new features and functionality and assist you in both the technical aspects and the business process aspects. You will be provided with a set of consulting and training services to guide you along the fastest migration path in order to maximize the value of your upgrade.

ROI OPTIMIZATION PROGRAM

Epicor Consulting has developed an exciting new program to provide our customers with post go-live support services: This program is the eServices ROI Optimization Program.

The main objective of the ROI Optimization Program is to ensure that your business systems remain highly optimized and fully leveraged. As with most business software, customers typically use only a partial amount of the available functionality initially. Epicor Service Consultants can help you maximize the return on your current system investment and implement additional features that you might not be aware of. The intention of the program is to share best practices across our customer base and to ensure your business is getting everything possible out of your Epicor investment.

INTEGRATION SERVICES

Leveraging the Internet is not just about putting a catalog on a Web site. The Internet can fundamentally change the way a company does business, uses systems, and communicates with its customers, suppliers and partners. Epicor has been helping its customers connect their businesses to the Internet for years, and it understands the impact of it on our customers' businesses. As a result, Epicor has established a specialized Consulting Services team that is focused on implementing e-commerce solutions.

Epicor's Integration Services team has the experience to implement Epicor e-commerce systems, from electronic storefronts to supply chain integration to customer portals. Epicor consultants are experienced with protocols, security, virtual private networks, XML schema standards, Microsoft Site Server, Microsoft IIS, HTML, DHTML, ASP's, Scripting, Microsoft DNA and a host of other technologies necessary to link up to the Internet. More importantly, Integration Services understands all aspects of Epicor's customers' businesses so the team knows how to tie e-commerce systems with sales, marketing, finance, distribution and manufacturing systems to e-enable an entire business – not just a Web site.

Global Presence

Our consulting resources are deployed regionally to effectively deliver services when and where you need them. Regional consulting offices are based in our America, EMEA and Asia Pacific regions.

Product Education

Epicor's Product Education department has been extremely successful in transferring our years of experience to you, our customers. Our continuously updated, hands-on, interactive classes impart a deep level of understanding of the functionality of the system. Our experienced, knowledgeable instructors equip you to make the best implementation and configuration decisions for your business. Real-life exercises and examples enable you to apply classroom concepts to precisely meet your company's individual needs and unleash the power of your Epicor solution. Our ever-growing eLearning series of courses allow you to take many classes

from the comfort of your own office. These courses cover topics such as new product information, technical reviews, advanced features, product overviews, and more.

If you have a large number of individuals to train, you may wish to schedule on-site education to avoid travel costs. This allows us to focus on those issues critical to your business, and allows you to train a larger number of people.

User Groups

Overview

For Epicor solutions, user groups have been organized throughout the world. These user groups are completely organized and managed by Epicor customers, provide an objective forum for networking as well as feedback to Epicor, and provide opportunities for our customers to share experiences and ideas with each other and with the Epicor product marketing and product management teams. The feedback from these groups positively influences our products, our partner relationships and our services.



USER GROUP LEADERSHIP COUNCILS

There are two Epicor User Group Leadership Councils (EUGLC), one for Enterprise and one for Vantage, along with subcommittees for specific topics or projects. The purpose of the leadership council is to represent the customer base and assist Epicor in being responsive to its customers' needs. The council has the opportunity to influence product development plans and customer support procedures to ensure that both our software products and our services meet our customer needs.



The User Group Leadership Council submits a prioritized list of issues and product enhancement requests to product management. Epicor then reviews these requests with the EUGLC in the form of a product summit. Product Summits consists of members of the EUGLC, key customers, and representatives from Epicor product management, product marketing and technical support teams. The agreed upon software fixes and enhancements are incorporated into the next product release.

It is important to note that Epicor will continue to address issues reported by individual customers directly to technical support. However, the User Group Leadership Council also has the opportunity to actively participate in Epicor's release planning and prioritization process.

PRODUCT LIAISONS

Each Epicor product line has a Product Liaison. The Product Liaisons help administer list servers, work with Product Development on customer surveys, and organize the SIG (Special Interest Groups) for each discipline within their product lines. For a listing of all Product Liaisons and SIG Leaders, please visit www.epicorusers.org.