

# Epicor 9 Release Overview Guide

September 2008

**EPICOR®**

# Disclaimer

This document contains an overview of the planned capabilities of Epicor 9. It is intended for anyone wanting a general understanding of Epicor 9. This document includes descriptions of product functionality that is not presently available. This document is intended to communicate Epicor Software Corporation's current intentions and is accurate as of September 2008. However, Epicor reserves the right to make modifications or changes to the functionality, release dates, technology, initiatives and plans described herein as business conditions dictate and without further notice. This document is not intended to obligate Epicor or any other entity to such functionality, release dates, technology, initiatives and plans, but merely to inform the audience of Epicor's current intentions. This document is for informational purposes only and is subject to change without notice. Epicor makes no warranties, express or implied in this document. The contents of this document are believed to be current and accurate as of its date of publication. For a complete description of the product features, please refer to the product's user guides, reference manuals and release notes. Companies, names and/or data used in screens, if any, are fictitious, unless otherwise noted.

This document also includes many "forward-looking statements" regarding anticipated product functionality, targeted release dates, availability of technology and certain company initiatives that involve risks and uncertainties, and actual results may differ materially. Such forward-looking statements, which are not historical fact, involve risks and uncertainties and actual results might differ materially. Such risks and uncertainties include but are not limited to, the company's ability to rapidly develop and introduce new products, reliance on third party products; reliance on emerging technologies and markets; the timely availability and market acceptance of new products and upgrades, the impact of competitive products and pricing, and the discovery of undetected software errors and other factors discussed in the Company's Annual and Quarterly reports, including on Form 10-Q for the period ending June 30, 2008. As a result of these factors, the business or prospects expected by the company as part of this paper may not occur. The company undertakes no obligation to revise or update publicly any forward-looking statements.

# Table of Contents

<b>Executive Summary</b>	<b>1</b>
<b>Global Support</b>	<b>2</b>
Global Engines	2
Global Capabilities	3
Global Multisite Management	3
<b>Financial Management</b>	<b>5</b>
General Ledger	5
Accounts Receivable	7
Accounts Payable	10
Cash Management	10
Currency Management	11
Asset Management	12
Multiple Books	12
Rebate Management	13
<b>Customer Relationship Management</b>	<b>14</b>
Epicor Information Worker	15
Marketing Management	15
Contact Management	16
Lead and Opportunity Management	17
Case Management	17
<b>Sales Management</b>	<b>19</b>
Estimate and Quote Management	19
Order Management	19
Demand Management	23
Storefront	24
Electronic Data Interchange	24
<b>Production Management</b>	<b>25</b>
Job Management	25
Lean Production	26
Manufacturing Execution System (MES)	27
Quality Assurance	27
Advanced Quality Management	28
<b>Supply Chain Management</b>	<b>29</b>
Inventory Management	29
Advanced Material Management	31

Shipping & Receiving	33
Purchase Management	35
Purchase Contracts	36
Supplier Relationship Management	36
<b>Planning and Scheduling</b>	<b>38</b>
Project Management	38
Forecasting, Scheduling and Resource Management	39
Material Requirements Planning	42
<b>Product Data Management</b>	<b>44</b>
Bill of Materials	44
Engineering Change and Revision Control	44
Routings	45
Product Costing	45
Product Lifecycle Management	46
Product Configuration	46
<b>Service Management</b>	<b>48</b>
Return Material Authorization	48
Field Service	48
Contract Management	49
<b>Human Capital Management</b>	<b>50</b>
Payroll	50
Human Resource Management	51
Training and Recruitment	52
Employee Self-Service	53
<b>Epicor Enterprise Performance Management</b>	<b>54</b>
Management Reporter	54
Operational Data Store and Data Warehousing	54
Epicor Replication Server	55
Scorecards and KPIs	55
Budgeting, Planning and Forecasting	56
Business Activity Query Designer	56
Business Activity Query Report Designer	57
Dashboards and Trackers	57
<b>Tools and Technology</b>	<b>60</b>
Epicor ICE 2.0 Business Architecture	60
Personalization	61
Styling and Themes	62
Epicor Portal	62
Web 2.0	63
Support for Software as a Service	63

Searches	64
Business Activity Management	64
Business Process Management	65
Epicor Service Connect	66
Epicor Advanced Print Management	67
Customization	68
Globalization and Localization	69
System Management	69
Software Development Kit	71
<b>Epicor Documentation and Content Delivery</b>	<b>72</b>
<b>About Epicor</b>	<b>74</b>

# Executive Summary

Epicor 9 is the result of more than 20 years of experience delivering high value, low total cost of ownership (TCO) ERP solutions to the global midmarket and the divisions and subsidiaries of large enterprises. Epicor's extensive experience in building solutions for the accounting, distribution, manufacturing, and services sectors all comes together in Epicor 9. It is the culmination of the CONVERGE pillar of our PROTECT, EXTEND, CONVERGE product strategy<sup>1</sup>, combining technology and functionality from all our award-winning ERP solutions into a single next-generation enterprise application solution to deliver even more business value for our customers.

Epicor 9 is built using Epicor ICE 2.0 business architecture, which incorporates Epicor *True SOA*<sup>™</sup>, a unique service-oriented architecture (SOA) that provides unprecedented choice and flexibility in how business solutions are deployed and used by all stakeholders inside and outside of a business.

The purpose of this document is to provide you with a comprehensive introduction to the complete Epicor 9 release allowing you to better understand how this groundbreaking solution can be used to add value to your business, improve enterprise performance and control over your operations, and enable your organization to more easily achieve strategic and tactical business goals.

---

<sup>1</sup> Please refer to Protect. Extend. Converge. Epicor Strategy Briefing, April 2007.

# Global Support

## Global Engines

In support of the global nature of business, Epicor 9 provides a number of features that will allow users to support operations in existing and new markets. The idea behind several of the “engines” delivered in the base application is to provide the ability for “out-of-the-box,” country-specific support. These global features include the Global Posting Engine, Global Tax Engine, Legal Numbering, and the Rounding Engine. For example, these global engines within the application are all configurable to meet the local legal, fiscal, country best practices, or customer specific needs.

**Global Posting Engine:** The rules-based Posting Engine is central to the Epicor financial applications which will allow for companies to use either:

- An “out-of-the-box” set of posting rules and business transactions, or
- Customizable sub-ledger posting rules (this would define how transactions from the sub-ledgers can be posted to the general ledger (for example, the same transaction can be posted to two different accounts in two different books).

**Global Tax Engine:** Due to the diverse, international requirements for country-specific tax requirements, a Global Tax Engine is leveraged to allow the system to be configured to country specific requirements to support the tax regime for sales tax, VAT, use tax, etc.

**Legal Numbering Engine:** Due to the country-specific international legal numbering requirements of Epicor customers, a legal numbering engine was added as a part of the application to manage legal numbering of the printed transactions that the company sends to a customer or supplier. Specific transactions that the legal numbering engine affects are:

- Sales Orders
- Purchase Orders
- Promissory Notes
- AR Invoices
- Credit Memos
- Payments (checks)

**Rounding Engine:** The Rounding Engine allows for the definition of currency rounding rules that can be selected for use within each of the associated modules. The rounding engine is configurable by customer, country, currency, and business practice. Number of decimals to use for amounts shall be specified per currency. Everywhere in the system where amounts are calculated, rounding is calculated to the number of decimals defined for the currency of the value. For example, when creating sales documents, amounts shall be calculated and rounded according to the defined rules for the currency of the document (the actual value printed on the document is always rounded to the number of decimals in the currency).

## Global Capabilities

Equally as important as the global engines to our customers are the global capabilities of the application primarily in the areas of Multicurrency, Multicompany and Multilingual capabilities.

**Multicurrency:** Multicurrency focus on exchange rate effective dates, multiple rate types, currency overrides at the transactional level including exchange rate at payment entry, revaluation enhancements, and reporting currencies which can be used in conjunction with Multiple Books.

**Multicompany:** Multicompany functionality provides for multiple companies within the same database as well as intercompany trade and transactions, which is the ability to work in multiple companies from a single sign-on. Based on a user's security settings, a user will be able to centrally process sales orders and create transactions and journals from within the same session without having to constantly switch companies. Users will be able to see from the menu all the companies to which they have access for transaction purposes.

**Language Support:** A single instance of the Epicor 9 software can support multiple languages with each available language displayed based on a user's preference.

## Global Multisite Management

Use the Multisite Management module to synchronize distribution of goods across multiple sites and the synchronization of master data across sites. This single system provides visibility and consolidation of resources in multiple facilities. It also supports running business functions centralized with separate production or distribution functions, or running them separately with the ability to consolidate financials at month or quarter-end. Multisite Management provides support for centralized accounting and purchasing, while allowing separation of production or distribution facilities.

**Alternate Bill of Materials per Plant:** Define alternate BOMs per part, per plant. When the same part is produced at multiple facilities, each plant can generate a BOM inclusive of their processes and configuration.

**Alternate Routings per Plant:** Define alternate routings per part, per plant. When the same part is produced at multiple facilities, each plant can execute a routing inclusive of their processes and configuration. You retain visibility and control, as plant-specific routings are maintained as sub-revisions of the base revision.

**Cost by Plant:** Hold average, actual, and last costs per part, per plant, ensuring the same costs apply to all plants.

**Credit Checking:** Define each company with its own credit limit against a customer, or you can deploy a global credit limit consumed by all of a customer's sales across all your companies.

**Deployment:** Deploy your companies on a single server/single database, or on multiple databases and multiple servers around the world. Many enterprises require their companies' data management systems to be geographically dispersed on different servers and different databases, to protect against communication glitches causing site downtime.

**Financial Consolidation:** Set up multicompany consolidation between any companies within the Epicor database. Financial rollups can even be done with companies outside Epicor.

**Forecasts:** Automatically send raw material forecasts to the supply companies. Later, these forecasts can be firmed up by creating inter-company purchase orders.



**Global Customers, Parts and Suppliers:** Define global customers, parts and suppliers. Global customers, suppliers, and parts can now have records transferred and maintained between companies. Based on a set of user-defined rules and mappings, automatically ensure that new and changed records are sent to all companies within your enterprise.

**Global Supplier Price Agreements:** Send agreements to all companies by setting up global price agreements for key raw materials to ensure materials are purchased from the correct supplier at the appropriate global price.

**Intercompany Eliminations:** Map accounts between companies for smooth inter-company eliminations. With frequent mergers and acquisitions, the general ledger account structure between parent and child companies may not be the same.

**Intercompany Trading:** Streamline inter-company transactions with Multisite Management. Multisite enables your companies to trade with each other via automatic sales and purchase orders; share forecasts; buy from global supplier price agreements; and identifies enterprise-wide credit limits for customers. Inter-company purchase order and sales order links have been established. Sales orders can be automatically generated from purchase orders made by companies within your enterprise. Additionally, all changes from the purchasing company are immediately visible to the selling company, and any changes made by the selling company are automatically sent to the supplying company.

**Master Data Management (MDM):** Collect, aggregate, match, consolidate, and persist distributed data throughout the organization to ensure consistency and control in the ongoing maintenance and application of master data information.

**Multicompany:** Provide for multiple companies to be managed in a single database, multiple databases, or a combination of both. You dictate whether to hold all companies in a single database, or each company in individual databases, where each company can have its own chart(s), base currency, and calendars.

**Multiple Currencies:** Consolidate financials in any currency. Each company in the hierarchy has its own currency, and the top-level corporation may have a different currency not shared with any other company.

**Plant Scheduling Functions:** View jobs for one plant or all plants, depending on security. This provides control and flexibility to each production facility, which often has its own production planner and scheduler.

**Production Plants:** Gain visibility to separate each plant's resource groups, inventory levels and jobs.

**Shared Warehouses:** Share one or more warehouses per plant to reflect the way each company conducts its business.

**Sourcing by Plant:** Define a unique source per part or plant - whether its default sourcing is purchased, produced or transferred. What is produced in one location may be purchased - or transferred in - from another.

**Subcomponent Security:** Authorize each user to view only information about specific companies to which they have access.

**Unique Accounts:** Establish individual accounts, including inter-company elimination accounts, for each plant and company.

**Unlimited Hierarchy:** Define the parent-child relationships between companies in an unlimited hierarchy. Each organization can have a parent company, which may also have another parent company, and so on.

**Virtual Plant Support:** Divide single sites with multiple production lines into multiple sites for virtual plants.

**Virtual View:** Build virtual views of the enterprise. For example build a workbench that allows a user to see all orders for a customer across all companies even though those companies may exist on separate servers and databases. The user can then open sales orders in separate companies all from the same workbench.

# Financial Management

Epicor 9 financial management solutions provide you with the tools needed to create value through monitoring financial conditions and timely decision making. General Ledger, Accounts Receivable, Accounts Payable, Cash Management, Currency Management, Asset Management, and Payroll help you monitor and manage invoicing, payments, assets, and payroll and benefits to reduce costs and improve cash flow. Epicor 9 financials can help improve your ability to drop more to your bottom line, the ultimate test of your success and competitive advantage.

## General Ledger

General Ledger (GL) processes and posts entries created by the operational areas of Epicor 9, as well as manual entries made directly in GL. A chart of accounts is easily established to control how you want the system to report on your business.

**Account Tracker:** Show the current activity and balances for the period you specify. Locate an account through word search capabilities. Summarize view with options to drill down to account detail and supporting journal entries.

**Adjustments:** With proper security, make prior year adjustments, and all balances forward will be adjusted.

**Allocations:** Automate allocation of funds across multiple accounts without manual entry.

**Auto-Export:** An open database design allows easy export of general ledger data to third-party software packages for additional graphing and reporting analysis.

**Balance Controls:** Balance Controls allow the user to define the frequency at which balances on GL accounts are captured and stored. This flexibility allows the user to update account balances as frequently as required: by minute, by hour, by day, by week or by month. The key benefit of this flexibility affects the timeliness and accuracy of financial reporting. When running reports across periods or between periods or even within the same day the system will be able to more easily access the data and retrieve the required information for the user. This will improve not only the performance of the system but also the speed with which a business can digest and react to that information.

**Budgets:** Enter figures for any account and year. Globally update budgets by percentage.

**Chart of Accounts:** Epicor 9 allows for up to 20 user-definable segments within the Chart of Accounts (COA) that can be used for accounting or reference purposes providing the ability to record, store allocate and report on important financial data at a highly granular level. For example, you will have the ability to set up accounting segments to cover the natural account, divisions, cost centers, plant and warehouse, if so desired. The remaining 15 segments could then be used as reference code segments used to track specific non-accounting data against general ledger accounts in the same book or in a completely separate book.

The total number of characters available to be used in the creation of the segments within the COA is 200. That's just for the segment values (including separators); separate description fields allow for longer textual descriptions.

As part of the definition of the Chart of Accounts we allow the users to define if a segment is balance segment, i.e. will allow the creation of a P & L and potentially a Balance Sheet for that segment, or if it is just a reference code dimension. Should a user choose to create a balanced segment this, provided the set up is correct in the General Ledger, will allow a user to create for example a P & L by

product line, or customer account, or even cost center. Where a user of the system uses a segment as a “dimension” this would allow for the tracking of costs booked for example against specific Trade Fair within a Trade Shows GL account. This flexibility affords the user considerable scope to track and report on their business operations. There is also the ability to copy a Chart of Accounts.

**Consolidations:** The consolidation functionality meets the needs of businesses today with consolidation at either a summary or detailed transaction level from different books and or companies within a defined relationship. This process also provides an “intermediate” consolidation book that allows for the analysis and reporting on the data prior to the commitment of the consolidation to the parent book. In the event of there being a change in the data being consolidated the functionality will also provide for a reversal of the previously consolidated information via a full reversing journal. We additionally support the conversion of a consolidation from one currency to another prior to consolidation in the parent company.

**Export/Import:** You can export your general ledger data to a spreadsheet to handle any special requirements and import these changes directly.

**Flexible Posting Times:** Post entries to any period in the current year, next year or any year, even while a period is still open.

**Financial Report Writer:** Epicor 9 includes an integrated financial report writer that meets the essential needs of our customers for management and financial reporting. This report writer has the ability to report across the multiple books, extract, manage and arithmetically handle the data set within the report writer, format the reports based on user defined formatting requirements and provide the capability to export the reports to Excel while maintaining the user defined format. The new report writer will follow Microsoft Reporting Services (SSRS) standards and is planned as a multi-release deliverable designed to help us provide an alternative to Microsoft FRx and Microsoft PPS Management Reporter, which in the interim will remain available to customers with more advance report writing needs.

**GL Revaluation Post-Year-End Transactions and Adjustments:** Finally, as other examples of country-specific functionality which can be used globally, there are multiple enhancements associated with revaluation processes including a new GL revaluation option, exchange rate overrides, global credit card management and authorization, and AP and AR Electronic Funds Transfer (EFT) wizards.

**Post-Year-End Transactions and Adjustments (13<sup>th</sup> Period Post Audit functionality):** Post-year-end posting allows for the ability for the accounting and finance team within your company to make post-year-end adjustments as they relate to management, audit or tax journals without them having to be processed in your final accounting period, but included in consolidations and retained earnings as appropriate. These are specific journals that arise out of typical year-end audits, sub-ledger closings, etc. Many countries require these to be recorded in a non-operational period.

**Statements:** Print comparisons between current actual and budgets or previous actual.

**Validation Rules:** It is important in today’s fast paced accounting environments to be able to control what can be posted to the General Ledger from the sub Ledgers, conversely what cannot be posted and finally where the users should be provided with a warning or error in the event of something happening with in the system that might be unexpected. The purpose of the Validation Rules within the application is to allow the users to configure the system so they can allow certain events to post, not post or deliver a warning upon the execution of the event. This configurable option provides an additional level of control over the posting of transactions via the posting engine supporting good governance with your company.

## Accounts Receivable

Use the Accounts Receivable (AR) module to bill your customers as goods and services are shipped or delivered, and then track payments as they are received. Because you can specify the creation of invoices through the order release process, you can reduce billing for a different quantity than for what was actually shipped. Customer invoices may be previewed, printed on laser or continuous preprinted forms, or faxed or e-mailed directly to your customer. With Accounts Receivable, you will know who is buying what, and who is paying their bills on time.

**Adjustments:** Allow adjustments with a full audit trail.

**Aging Information:** View aging information on the screen or print it in one of several formats.

**AR Interest Invoices:** Create and apply interest invoices to manually charge an interest amount to an overdue or late-paid invoice. Select a customer and choose the single or multiple invoice lines against which to generate the interest invoice. For each selected invoice, an interest line is created. Finance charges on invoices can be generated against a customer's overdue invoice balance. These finance charges are automatically calculated based on rules defined within the Finance Charge Maintenance program. The charges can also be reviewed before they are posted. Users have the ability to include or exclude the impact of credit memos when calculating finance charges.

**AR Settlement Currencies:** Record currency gains and losses at the time of settlement and posting in the event that you invoice in one currency but are paid in another.

**AR Terms and Conditions:** Supports all of the most common business practice terms and conditions within Accounts Receivable. This feature also affords great flexibility for the definition of creative receipt terms within countries where this functionality is not necessarily demanded but may offer a competitive advantage. Terms and Conditions are user defined, but typically include; End of month plus n days, End of following month, Specific due dates in a month, 2% 10 days and Net 20 days.

**Bill-To Customer Logic:** Provides the ability for a Customer to maintain a list of allowed Alternate Bill-to (Alt-BT) customers, optionally with one set as a default. This will default onto the Quote/Order/Direct Invoice and can be changed by the user to a different authorized bill-to customer prior to posting the invoice. If no alternates have been set up then the Alt-BT customer is the Sold-to customer (but using the 'Bill-to address' on that customer).

**Cash Receipts:** Accommodate payment of invoices, order deposits and miscellaneous application of credit memos.

**Consolidated Invoice Reporting:** When an invoice is consolidated, both the Sales Analysis Report and the Sales Gross Margin Report will group lines together based on each Sold-to customer.

**Credit Card Management and Authorization:** Use Credit Card Management to accept credit and debit cards as a form of payment. This functionality processes credit card authorization and payments in real-time, for accounts and single or multiple transactions. Credit card data encryption meets recognized security standards for these transactions.

**Credit Card - Global Support:** Credit Card Sales transactions are managed on a global basis through our partnership with international credit card payment providers. This is a particularly important feature for distribution companies who need various options for the processing of Sales Orders. The Credit Card information stored can be reused for future sales orders and is securely encrypted to meet and exceed industry standards. Additional functionality in this area means that credit card sales can be pre approved, CVV and addresses validated and if

required purchases can be reauthorized with the credit card vendor prior to the goods being shipped.

**Credit Holds:** Automatically place credit holds on new customers or on those who are past due or over their credit limit.

**Credit Manager Workbench:** Easily view all credit related information surrounding a customer. The credit manager workbench provides a single point from which to manage credit status, order credit status and account management, with drill-down to all associated information.

**Customer Receipts:** Enter payments to invoices, adjustments to balances or application of credits.

**Customer Reminders:** The reminder feature (formerly called Dunning) allows companies to track the history of their customers' AR balances together with the option to issue them user-defined reminder letters. There is also an optional ability to calculate late fees, interest invoices, and finance charges on the outstanding balance, which can then, if the company so chooses, be posted to a customer's AR account.

**Customer Tracker:** Perform real-time queries on summary and detailed information per customer, including sales orders, invoices and quote activity to date.

**Debit Notes:** Ability to record Debit Notes (Charge-backs) sent from the customer.

- Debit Notes may be entered as part of the AR cash receiving process, and will then have their value applied as part of the settlement process. The Debit Notes may be related to specific invoices or remain unassigned.
- The new Debit Note will remain as an open receivable until matched to a credit memo or subsequently paid.
- Debit Notes sent by customers can be recorded independently of the cash receipt process – for example electronically received payments. They can then either be applied or produce an unapplied cash value.

**Electronic Report Formats and Transmission:** Submit various legal reports electronically, which are based on existing reports such as the EU Sales List, Intrastat and Tax Reporting. You can then reformat generic reports to meet your local requirements.

**Epicor Tax Connect:** Epicor Tax Connect, which uses the Avalara® AvaTax® a leading on-demand sales tax management cloud service, eliminates the tedious work and complexity of determining sales tax jurisdictions of ship-to addresses, maintaining tax codes and rates, and dealing with jurisdiction-specific and commodity-specific taxation rules. Epicor Tax Connect provides on-demand address validation, sales tax calculation, and sales tax reporting and automated returns generation. The Epicor Tax Connect service provides these capabilities for the United States and Canada, however country or regional specific tax services providing similar functionality could be integrated as well.

- **Activation:** Activation and subscription fees are required for this service and are determined based on the number of AR invoices you process and on the number of sales tax returns you submit to taxing authorities.
- **Notifications:** When the AR invoice is posted to GL, the service is notified for sales tax reporting purposes and for subscription accounting of the transaction.
- **Real-Time Tax Calculations:** When generating an AR invoice, the verified address and line item information is passed to the service in real-time to calculate sales tax based on jurisdiction and any applicable taxability rules. The resulting tax information is stored with the invoice in the Epicor database.

- **Tax Solution Integration:** Use the integration to Avalara AvaTax, both on-demand and on-premise, which includes real-time address validation, tax rate lookup, and tax calculation.
- **Verify Customer Addresses:** Verify customer addresses against a CASS-certified database. This is necessary to determine exactly which tax jurisdictions apply to that address. When entering or updating an address, the service will verify the address in real-time. It is capable of correcting spelling errors and adding ZIP code and ZIP + 4 if they are missing. The complete and correct address gets saved to the database.

**Future-Dated Payments:** Additional payment and receipt options including AR and AP future-dated payment instruments, which allow you to handle and transact in Bills of Exchange.

**General Ledger Interface:** Automatically create and post general ledger entries from accounts receivable transactions.

**History:** Retain payment history, invoice history and sales detail indefinitely.

**Invoice Entry:** Enter multiple shipments for an order on a single invoice, and write unlimited comments. Invoice entry supports advance/progress billing deposits, credit memos and standard invoices.

**Invoice Logging:** Allows you to capture and record the details of an invoice and the input tax (with an option turned on) within your accounts while that invoice is in the process of circulating the company for review and approval. This allows you to reclaim the input tax in a timely fashion, where such practices are allowed.

**Invoice Tracker:** View customer invoices and payments in either summarized or detailed format.

**Invoice/Statement Forms:** Customize, preview, fax, and print individually or in batches.

**Manual Selection of Shipments and Invoices:** A Manual Selection button is available on the Get Shipments, Get Invoices, and Get Recurring Invoices windows accessible from the AR Invoice Entry program. This button allows the selection of particular or multiple shipments, invoices, or recurring invoices for posting instead of selecting all available items in these windows.

**National Accounts:** The management, monitoring and control of national accounts hierarchies is particularly important within the Distribution and Manufacturing sectors where more and more local operations are distribution centers or production plant/subsidiaries of a larger organizations. The National Account features provides the ability to create customer relationships, either hierarchical or the more traditional parent/child type, within Accounts Receivable. This functionality allows customers within a National Account group to accept invoice payments from any customer within the relationship. It also permits extensive credit checking and risk management across the National Account group with credit available to be split across levels with or without variable pooling. In parallel to the addition of the new functionality the reporting has also been enhanced to provide appropriate information to support these new features.

**Sales Analysis:** Access sales history in a variety of report formats.

**Sales Commission Report:** Display outstanding and earned commission amounts.

**Sales Commissions:** Pay sales commissions at time of invoicing or on receipt of payment. Establish up to five sales representatives per order line.

**Sales Tax Register:** Lists invoice totals and tax amounts by customer for codes on file.

**Settlement Discounts:** Apply a credit to an account, due to a negotiated discount for settlement, and charge it back to selected invoices to impact the original sales accounts. Recalculate taxes when this is an early settlement of an AR invoice.

**Tax Regimes:** Tax tables include the ability to define or override rate effective dates.

**Taxes:** Enter taxable and nontaxable lines. Accounts Receivable allows an unlimited number of sales taxes per order line.

**Void Invoices and Cash Receipts:** Void invoices and cash receipts in AR, as required.

## Accounts Payable

Accounts Payable (AP) allows you to enter supplier invoices for purchases that you make, then create payments for the invoices you want to pay. The system can generate payments for all invoices due, those for a particular supplier or only for specific invoices. If a supplier calls you to discuss an invoice, you will have complete information at your fingertips and that history can be kept indefinitely.

Accounts Payable allows you to update both purchase orders in Purchase Management as well as actual job costs. Adjustments are created if the purchase price does not match the invoiced price. With Accounts Payable, you will know how much you owe and when it is due.

**AP Terms and Conditions:** Supports all of the most common business practice terms and conditions within Accounts Payable and Receivable. This feature also affords great flexibility for the definition of creative receipt and payments terms within countries where this functionality is not necessarily demanded but may offer a competitive advantage. As Terms and Conditions are user defined anything is possible but, typical types of terms include for example: End of month plus n days, End of following month, Specific due dates in a month, 2% 10 days and Net 20 days.

**Checks:** Print checks for select payments, or create manual checks.

**Exchange Rate and Payment Entry:** Purchases may be made in any currency and goods received in any currency with support for the entry of an exchange rate at the point of payment entry.

**Future-Dated Payments:** Additional payment and receipt options including AR and AP future-dated payments allow you to handle and transact in Bills of Exchange.

**General Ledger Interface:** Automatically create and post general ledger entries from accounts payable transactions.

**History:** Keep accounts payable transactions and supplier history files indefinitely.

**Invoice Matching:** Match invoice, receipt and purchase order online.

**Online Cost Updates:** Update jobs created in Job Management directly by material and subcontract costs entered through Accounts Payable.

**Purchasing Variance:** View variances between planned and actual purchase price to allow cost adjustments and analysis.

**Recurring Entries:** Create standard accounts payable invoices.

**Supplier Tracker:** Show online inquiries for open invoices, outstanding balances and payment detail.

## Cash Management

**Bank Statement Upload and Reconciliation:** You can automatically upload electronic bank statements and then reconcile these statements with the manual reconciliation of unmatched items. Through this functionality, you combine several items in the application to match against one or more items on the statement. You enter the statement number, date, and full historical statement reconciliation success records. You can also perform manual allocation, enter ad-hoc, non-AR,

or non-AP statement amounts while in the reconciliation routine. Lastly, you generate an item list and a report.

**Bank Reconciliation:** The reconciliation functionality allows users to reconcile and post bank fees, bank charges and other miscellaneous transactions alongside AP payments, AR cash receipts and payroll transactions, as they appear on the bank statements.

**AP Cash Management:** Improve cash management through the automatic handling and reporting of discounts available, payment due dates and payment selection methods.

## Currency Management

Currency Management automates the process of both buying and selling in foreign currencies. With tracking of default currencies as well as extensive exchange rate tables, manual transactions are reduced. Lock transactions in at a specified contract rate with automatic gain or loss reporting, reducing the guesswork from handling foreign transactions. Throughout Epicor 9, the currency symbol is displayed notifying the user of the currency being used.

**Accounts Payable:** Print checks in the supplier's currency, with amounts automatically converted from the base currency.

**Bank Accounts:** Specify the currency used by the bank for each of your accounts.

**Base Check Box:** Throughout the application, you can automatically convert amounts to your company's currency by selecting the Base check box.

**Cash Receipts:** Automatically convert cash received in the customer's currency back to base currency upon receipt.

**Currency Tables:** Optionally define multiple currency tables per company.

**Customer Orders:** Automatically default a customer's order to the customer's base currency, but may be changed at any time.

**Customer Price Lists:** Assign a default currency to each price list when price lists are defined for various customers.

**Exchange Rates:** Update exchange rates as frequently as daily to support last minute exchange rate changes.

**Gain/Loss:** Create and post gain or loss calculations automatically to the general ledger.

**Invoicing:** Automatically default invoices to the customer's base currency, or change at any time.

**Purchase Orders:** Automatically default supplier purchase orders to the supplier's base currency, or change at any time.

**Quotations:** Send quotations calculated in your prospect or customer's base currency.

**Reporting:** Conveniently convert reports to base currency so there is no need for recalculations when determining profitability or cash requirements.

**Revaluation Options:** Epicor 9 provides 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.

**Service Contracts:** Designate the appropriate currency for each service contract.

**Streamline Data Entry:** Streamline data entry by specifying a default currency per country, which will then default to all customers and suppliers associated with each country.



**Supplier Price Breaks:** Support the supplier's currency structure with price break tables.

## Asset Management

Asset Management is useful for tracking assets and their depreciation. Examples are office furniture, computers, copiers and so forth.

**Asset Addition Entry:** Add assets as they are needed.

**Asset Disposal Entry:** Dispose of assets.

**Asset Year End Process:** Calculate values and depreciations for assets at the end of a fiscal year.

**Depreciation Recalculation:** Determine by how much assets have been depreciated.

**Manage Mid-Year Changes:** Control under- and over-charges by choosing how additions or changes to an asset's depreciation charge are treated—even when the change occurs part-way through a fiscal year.

**Flexible Charging:** Decide how to charge the opening book value of an asset when it is less than the annual depreciation charge. Charge it on a periodic basis until the book value equals zero, or spread the reduced annual charge across all periods in your fiscal year.

**General Ledger:** Keep your general ledger in sync with asset management through the comprehensive array of asset management accounts, such as: Asset provision account; Depreciation charge account; Addition control account; Disposal control account; Disposal provision account; Disposal profit/loss account.

**Comprehensive Asset Definition:** Quickly answer detailed questions regarding the location, source, and maintenance of your assets.

- **Location:** Identify the location of your assets.
- **History:** Document asset source, original purchase order and invoice number, manufacturer, manufacturing job number, and serial and/or model number.
- **Insurance:** Capture and reference insurance information including insurer, asset policy number, monthly premium information and renewal date.
- **Lease:** If the asset is leased, document lease information like monthly lease cost, mileage, and lease end date.

## Multiple Books

One of the key requirements for many of our customers is the ability to have multiple General Ledgers and multiple Budgets. Very often there is a need to prepare a General Ledger for a parent company in the format they require while your local requirements are different. Alternatively the reverse can be true, and you have subsidiaries that need to report locally in compliance with local requirements but need to report to you as the parent for management purposes.

**Chart of Accounts:** Create different charts of accounts and post transactions via the Posting Engine to different accounts within different books with specific validation rules for each.

**Reporting Currency:** Have a different reporting currency tied to each book and even, if ever needed, assign a different period calendar to each book. This flexibility allows the users with a single journal to process both the management accounts and the statutory accounts at the same time without the need for multiple transaction entry.

**Multiple Reporting Budgets:** Multiple books can also be used to create multiple budgets, which have the ability to be imported and exported. This means companies will be able to create a budget in one book, a revision in another book and a forecast in a third book. Reporting across multiple books can tie this together for analysis and comparative purposes.

**Multiple Closing Calendars:** As businesses acquire new businesses there is often a need to maintain different calendars for “stub” periods or for example up to 18 months to bring the acquired company in line with the fiscal calendar of the acquiring business. Multiple books provide the ability to have different calendars per book which will meet this business need. In addition to this, if a company wanted to maintain a separate book and calendar for Management Accounts and Statutory Accounts this could be accomplished with multiple books. Coupled with the new Apply Date functionality throughout the application, this would ensure that the Posting Engine applied the transactions to the correct period without the need for the user to make multiple different entries. The Epicor financial applications have built in support for a 13<sup>th</sup> period to be defined as a part of your calendar that will be used for year-end adjusting entries.

## Rebate Management

The Rebates module provides you with a way to enter, update, and review any rebate program that your company runs with your customers. The module lets you accumulate rebates and pay a designated sold to customer, bill to customer, or another designated customer. These rebate amounts are based on part and product group sales during a specified date range. Use this module to define the active rebate programs for your company. You can then generate the rebate transactions. Lastly, this functionality lets you pay the rebate amounts to your customers through either an invoice check or a credit memo.

**Generate Rebate Transaction Process:** Use this program to generate all the rebate transactions that occur within a defined date range.

**Get Rebates:** This Actions Menu command is found both in AR Invoice Entry and AP Invoice Entry. Use this command to turn the rebate transactions into AP invoices or credit memos.

**Rebate Contract Entry:** This program lets you enter rebate information for a single customer or a group of customers. You define the product groups or specific parts that will be included during the rebate offer as well as the rebate break that the customer or customer group will receive.

**Rebate Transaction Adjustment:** The Rebate Transaction Adjustment program lets you review all rebate transactions.

**Tracker programs:** There are two tracker programs, Rebate Contract Tracker and Rebate Contract Status Tracker that you can use to follow the progress of the rebate programs.

# Customer Relationship Management

Customer Relationship Management (CRM) equips you with the tools you need to find more prospects and efficiently convert them to satisfied customers. Your sales people can manage the complete prospect-to-customer lifecycle, give accurate revenue forecasts to management and automate many administrative tasks. The bottom line is better qualified prospects, shorter sales cycles, reduced lead-time, and more revenue. With CRM you can manage and analyze the effectiveness of marketing campaigns and events. Marketers can pinpoint targets, capture highly qualified leads, and perform cost/benefit and return on investment (ROI) analyses on promotional activities. The campaign manager can track the number of leads, opportunities, orders, and costs per campaign. Once you have the lead, the CRM functionality helps manage the entire sales process more effectively, with features such as workflow and forecasting.

**Account Information:** Track and report on customers, prospects and suspects.

**National Accounts:** The management, monitoring and control of national accounts hierarchies are a key requirement across all types of business. This feature provides the ability to create customer relationships, either hierarchical or the more traditional parent/child type. A Parent Customer Tracker provides the consolidated view of customer data across multiple customers and the Site/Ship-to tracker is similar in format.

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

**Call History:** Maintain detailed call history regarding new opportunities with prospects or existing jobs with customers and share with the entire organization.

**Call Log:** Link attachments to each call record using the Call Log.

**Graphical Icons:** Graphical icons can be found throughout the CRM module with a consistent representation to identify information found against menu trees, sheet headings, grids, and drop downs. Through personalization, users have control over how these icons are used (similar to Windows or Internet Explorer).

**Mobile Connect:** CRM gives you control over your customer interactions—generating leads, developing opportunities and monitoring orders. CRM functionality is available from anywhere in the world. The Mobile Connect series incorporates a disconnected database, enabling you to work anywhere you can take your laptop. Epicor Mobile Connect is comprised of three components: Sales mConnect, Sales Engineer mConnect and Hub mConnect. Epicor Mobile Connect helps your sales representatives and sales engineers stay connected with their customers without requiring network connections.

**Synchronization:** mConnect provides full and light options for synchronizing your remote database with your primary Epicor database, ensuring data integrity and consistency, and fast and easy updates.

**Hub mConnect:** Configure your remote sales office server with Hub mConnect, and multiple mConnect users can access its database simultaneously. Individual mConnect users don't need to synchronize, because Hub mConnect does it all. And there is no downtime due to lost connections to a remote database.

## Epicor Information Worker

How can you connect all your people, your business processes and the business application data they need? Epicor Information Worker (IW) is an innovative productivity tool that works seamlessly within a familiar Microsoft Office environment to enable business users to get all the information they need, in context, in real time when they need it and where they want it. It does this by blurring the lines between enterprise software and desktop productivity software to create a single immersive solution.

Many business workers simply don't need to utilize all the powerful features of your Epicor enterprise application, but they do need access to the data it stores. Epicor Information Worker combines with Microsoft Outlook, Word, and Excel to allow qualified users to retrieve, view, and modify Epicor data. Epicor application licenses are only required when users are capturing or synchronizing data, which allows your business to extend the reach of your Epicor information to a broader community of users.

Information Worker is an Epicor application that lets Microsoft® Outlook® users view and update data to and from the application. Users can do this during both online and offline (disconnected) modes. Although this application is primarily designed to allow employees direct access to application data from inside Outlook, this data can also be viewed in other applications.

**Integration with E-Mail:** E-mail customer or prospect contacts from within the solution. E-mail is automatically stored as a call with the account.

## Marketing Management

**Campaign Creation:** Rapidly build sophisticated, personalized messages and newsletters.

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

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

**Complete Editing Tools:** Use standard editing tools like spell check and formatting to draft professional customer e-mail and letter communication. Use Microsoft standard cut-and-paste technology to easily manipulate text.

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

**Data Management:** Extract marketing lists based on any criteria such as customer type (such as, suspect, prospect, customer) and other attributes including standard industrial classification (SIC) code, location, contact type, territory, and so forth. Automatically create telemarketing or sales follow ups. Automatically log an entry for customers when they are included in a marketing list. Marketing list import allows customer and contact information to be imported from external sources. De-duping capabilities allow the management of imported lists and the tidying up of the marketing database.

**Segmentation:** Utilize the power of your existing systems to generate more effective campaigns. By responding to previous purchases, requests or general demographics, you can generate targeted campaigns and optimize profits.

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

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

**Campaign Connect:** Campaign Connect is a comprehensive tool that helps you design and distribute e-mail communication to customers, suppliers, and business partners. Whether developing a marketing campaign or creating a company statement to business partners, Campaign Connect ensures your company is professional, takes advantage of its e-mail marketing opportunities, properly responds to market requirements for opt-out controls, and analyzes the campaign results for better effectiveness in the future. Campaign Connect makes marketing easy. Campaign Connect manages the entire campaign cycle - from identifying and importing contacts, to creating targeted e-mails and a corresponding Web landing page. It delivers thorough reporting and analysis tools to help you build more targeted campaigns. Its user-friendly environment enables you to quickly and easily implement focused e-mail campaigns with minimal training. An extension to the full CRM application, Campaign Connect helps drive efficiency and gain true ROI for your campaigns. By simplifying and automating campaign processes, Campaign Connect shortens campaign cycles, allowing you to produce more campaigns, more often. And Campaign Connect dramatically reduces overhead by eliminating the need for postage, printing and shipping required for traditional direct mail campaigns.

**Import Wizard:** Use a simple flat file import from a standard CSV or text file format for easy campaign generation. Open database connectivity (ODBC) import offers flexibility in data sources.

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

**Web Micro site Design:** Build a micro site to Web-enable your campaign, and then gather detailed campaign analysis by monitoring the footprint of your audience as they step through the site.

## Contact Management

Contact Management makes keeping in touch with your customers and prospects easy. It provides a basic component of CRM and promotes responsive and proactive communication. Contact Management enhances your customer service by documenting and sharing customer communication with the entire organization. Improve overall responsiveness to customer inquiries with simple user task management. Use Contact Management to actively analyze your most compelling opportunities and assign them to sales representatives.

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

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

**Contact Related Information:** This provides a visual indication that more data exists against a particular record or form behind calls, notes, comments, etc, the system will proactively let people know that more options exist. Typical data indicators would include icons (which link to the data) for events, holds, attachments and links.

## Lead and Opportunity Management

**Convert quotes to orders:** Easily convert an entire quotation to a sales order in one step.

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

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

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

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

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

**Sales Engineer mConnect:** All the functionality of Sales mConnect is included, plus the ability to engineer entire BOMs. Use drag-and-drop functionality to add subassemblies, operations and materials, or incorporate parts on-the-fly.

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

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

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

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

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

## Case Management

From initial call to resolution and follow-up, Case Management provides a customer focused solution for personalized, high-quality service. This comprehensive one-stop solution enables your service team to manage current case load and respond quickly to customers for industry leading customer satisfaction.

Case Management includes a case workbench equipped with time saving links to customer focused activities (for example, new quotes, orders, RMA requests, or service calls). In addition, there is a search-driven knowledgebase and case driven workflow for standardizing case resolution.

Case Management is fully integrated with the Field Service application for easy access to dispatching field activities and enable field service representatives access to online knowledgebase's, existing customer field service calls, warranty information, and service contracts.

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

**Case Categories:** Inquire and report cases by user-defined categories.

**Case Context:** Use case specific details (for example, part number, order number, service call reference or warranty reference) to inquire on and link directly to related information, optionally generating new transactions.

**Case Management Workbench:** Manage open case load by status (for example, open or under review) and allow support managers to assign outstanding cases. Review customers, quotes, orders, outstanding return material authorization requests, field service calls, warranties, service contracts, and helpdesk cases from a single case workbench.

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

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

**Convert Case:** Easily generate a quote, order, field service order, repair order, job and RMA from a case, bringing the detail of the case into the new document.

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

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

**Workflow:** Monitor every stage of the support process. Manage processes using user-defined workflow that is case or issue specific, ensuring standardization of process and that nothing slips through the cracks.

# Sales Management

Quoting and managing sales orders enables the vital coordination of activities between your sales, plant, shipping and accounting groups. It facilitates efficient management of accounts, pricing, shipping, invoicing and commissions. Sales management provides you with the tools to produce accurate estimates, streamline your order-to-cash cycle, and calculate reliable estimates and improve customer service.

Quote Management and Order Management enable you to capture orders and seamlessly integrate the information with supply chain, production, fulfillment, and accounting systems. By streamlining the sales process centralizing access to product, pricing, and customer information - orders can be generated with a minimal number of steps. It automates and improves labor-intensive processes for quoting, proposal generation, configuration and order entry. You can increase sales productivity by increasing accuracy during the quote and order processes, and identify the right solution to meet your customer's needs.

## Estimate and Quote Management

Quote Management is often the starting point for the supply chain cycle. When a quote is entered, manufacturing details can be entered for the record, giving a good head start for job management, scheduling, purchasing, and other parts of the system. The result is greater efficiency.

**Manufacturing Details:** You can get details for a part, configure the part, and determine the applicable pricing of the part, directly from Quote Entry.

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

**Quote Order Wizard:** Quickly generate appropriate orders from new quotes. Along with the Order Job Wizard, you can quickly create, plan, schedule and release jobs against multiple lines and multiple releases.

**Quote Tracker:** As a single source for all activity about an order, use the Quote Tracker to see a summarized view of the quote; then drill down on selected items to see greater details. Based on technology used in the Dashboard you can optionally use real-time data to link to other parts of the system.

**Searches:** You can search by Quote Number, Customer Name, Salesperson, Part Number, and Customer Part Number. You can filter by All, Quoted, Lead, Opportunity, Quote, and Not Quoted. You can search only within a particular territory. The result is a very powerful search for quotes.

**What-If Scheduling:** You can perform a what-if schedule on a quote line, for better understanding and communicating when a part might be done.

## Order Management

Order Management drives the Epicor system. From the time an order is entered, its progress is tracked through final shipment, producing timely reports on demand. With Order Management, all orders and change orders are effectively managed online, reducing your chance for error and smoothing out the entire order-to-delivery process for maximum customer satisfaction.

**Backorders:** Orders automatically create backorders for lines shipped incomplete. Backorder flexibility enables customer specific backorder parameters for complete order lines or complete orders to be set.



**Bill To, Ship To, and Sold To:** Update the Ship To at the time of shipping in Customer Shipment Entry. Use the one-time Ship To capability in Order Entry to do a one-time shipment to an address, if the customer record is flagged to allow these shipments. Bill third-parties such as a customer of your distributor.

**Bill-To Customer Logic:** Provides the ability for a Customer to maintain a list of allowed Alternate Bill-to (Alt-BT) customers, optionally with one set as a default. This will default onto the Quote/Order/Direct Invoice and can be changed by the user to a different authorized bill-to customer prior to posting the invoice. If no alternates have been set up, then the Alt-BT customer is the Sold-to customer (but using the 'Bill-to address' on that customer).

- Customer table holds a flag for which customers can be used as an alternate bill-to for other customers.
- Customer table holds, against a customer, a list of authorized alternative bill-to customers with one customer optionally setup as the default.
- Invoices store the sold-to customer information.
- Default currency, terms and other fields are generated from the sold-to customer.
- Credit limit checking is performed against the bill-to customer.
- The invoice is posted to the ledger of the bill-to customer and subsequently tracked against that customer.
- Priority Override by Order.

**Blanket Orders:** Establish multiple releases (set up as either firm or not firm) for each sales order line and pull parts directly from inventory, or seamlessly integrate with Job Management to generate production orders.

**Build Order From History:** See previous orders and enter the quantity on the order form, or copy an earlier order.

**Calculations at the Order, Line, and Release Levels:** Tax calculations and fields are available at the sales order, line, and release levels.

**Contact Tracker:** This tracker lets users follow contact activity throughout the application. This is a display-only version of consolidated contact-related functionality found within Customer Maintenance, Sales Order Entry, and Quote Entry and so on.

**Credit Card Authorization and Encryption:** With the increased use of credit cards to purchase products, it is necessary to have an integrated system to record and encrypt credit card information as well as process the payment.

**Credit Checks:** Check customer credit status online at quote entry, order entry and shipment entry.

**Cross-Docking:** In conjunction with the Fulfillment process, cross-docking provides the ability to directly link future inbound supply of items from Purchase Orders or Jobs directly to demand from Sales Orders, Transfer Orders or Jobs. When the cross-docked items are received they are immediately directed to the demand they are linked to minimizing the time and task to fulfill the order or job.

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

**Customer Buffers:** Customer.EarlyBuffer and Customer.LateBuffer are on time calculations to OrderTracker and VBI datamarts. This mirrors the functionality in the Supplier master. Action menu enables user to view customers that use alternate bill-to customers.

**Customer Portal Content Pack:** The Epicor Portal Customer Content Pack provides interactive customer facing content that supports strategic goals for improved customer communication and direct collaboration on day to day business, right from your website. Additionally, customers enjoy 24 X 7 self-service and can access, review, and make online requests for quotations. The Epicor Portal Customer Content Pack is designed to deliver the information your customers are looking for; open and closed orders, shipments, return material authorizations (RMA's), invoices and credit memos along with payment history and service calls.

**Drop Ship and Buy to Order:** The Drop Ship and Buy to Order feature allows for sales orders to be taken and for a purchase order to be created directly for the sales order item. These items can then be shipped either directly from the supplier to the end customer or they can be delivered to your facility, but in both cases the purchase order is directly linked to the sales order.

**Flexibility:** Relate orders to jobs using one-to-one, many-to-one, one-to-many and many-to-many production strategies.

**Freight Estimation:** Estimate freight during the order entry process. Note: Requires 3<sup>rd</sup> Party Freight/Manifest system to be installed. Use the Customer Accounts for Carriers program to store account codes for your customers for use in the shipping process.

**Fulfillment Workbench – Reservation and Allocation Processing:** Use the Fulfillment Workbench for allocation or reservation and distribution processing sales, transfers and job order types. Reserve Parts at the warehouse level or fully allocate at a Bin level the specific Lot, Lot Attribute or Serial Number desired for the specific Order, Line, and Release. Various fulfillment techniques, such as pick and pack and console-driven handheld processes may be performed through the use of templates to automate the fulfillment process for each.

**Fulfillment Queue Management:** Manage your work queues from the shop floor to assign tasks that are created by, but not limited to, the Fulfillment Allocation process. Choose whether the shop floor operates based on paper, or becomes a paperless operation with automatic user-assignments driven by the Material Queue. Available transaction types are:

- **Put Transaction Types** - This transaction type is for all directed Put-Away transactions, including purchase order receipts, transfer receipts, RMA receipts and job receipts.
- **Pick Transaction Types** - This transaction type is for all directed Pick transactions. This includes sales order picks, issues to jobs, transfer picks, cross docking, and any bin to bin movements.
- **Pack Transaction Types** - This transaction type tracks Pack Out station task loads. During the pick process, the application calculates which suggested Pack station should pack the order based on task load.
- **Queue Tracker** - Use the Queue Tracker to view the status of Put, Pick, and Pack transaction types, and set the data to automatically refresh. Managers can view shop floor activity without having to filter on the various queue transaction types, which have unique identifiers. Warehouses and Bins use attributes to identify what specific transactions need special equipment, and the Queue Tracker assigns only those resources or groups with the ability to operate the specialized machinery. Managers also create resources and groups and assign them transaction types and the priorities in which the transactions should be executed.

**Lock Order Line Quantity:** The ability to define a Sales Order line as a blanket order for a fixed quantity with the following options and features:

- A logical field on the Order Line keeps line quantity constant.
- Total quantity for the blanket order and the final delivery date are held at the line level.
- New releases decrement the final delivery quantity on the final delivery date, keeping the total line quantity in balance with the release.

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

**Multiple Ship-To Addresses:** Track multiple ship-to addresses per order release.

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

**Order Tracker:** As a single source for all activity about an order, use the Order Tracker to see a summarized view of the order then drill down on selected items to see greater details (for example, lines, releases, shipments, charges, bookings, audit, and payment information). Based on technology used in the dashboard, optionally use real-time data to link to other parts of the system.

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

**Price Lists:** Generate customer, product group, and warehouse and product specific pricing hierarchies at a UOM level while matching the end user currency with flexibility. For global enterprises that share and distribute pricing, company, plant, and warehouse specific pricing offers further flexibility in pricing products.

**Sales Commission:** Manage sales commission calculations for both direct and indirect sales teams. Optionally allocate commission percentage over multiple sales entities per order line.

**Sales Kits - Customer Shipments:** Customer Shipments has been enhanced to determine the configuration of the sales kit. Based on the configuration, the following actions occur:

- If the kit is flagged as ship complete and auto issue then the quantity of the kit parent item being shipped is entered. The quantity for each of the kit components to meet the kit parent item shipment is calculated and all of the kit children order detail lines are processed and added as shipped lines.
- If the kit is flagged as ship complete but not backflush then the quantity of the kit parent item is entered, the children lines will be added and the picking location entered. The quantities for the kit components cannot be changed.
- If the kit is flagged as NOT ship complete then the individual kit components can be selected and added as shipment lines and the picking location as well as the quantity shipped, are entered.

**Sales Kits - Packing Slip and Invoice Print:** Packing slip and invoice printing can be configured to either print the individual kit items or just the kit parent item.

**Sales Kits - Parent Parts:** Order Entry will determine if the part is a kit parent item. The kit parent item's bill of materials, associated with the most recently approved revision, will be exploded. Each of the items on the bill of materials, along with the quantity required, will be stored as an order detail record linked to the parent sales order line that contains the kit.

**Sales Kits - Part Type:** To facilitate the use of phantom-type items, the concept of Sales Kits is incorporated into the application. To allow parts to be identified as sales kit items, an Inventory Type called "Sales Kit" is included.

**Sales Kits - Capable to Promise:** The Capable to Promise logic works with Sales Kits. The kit components are accessible from the context menu of the Job Number field.

**Sales Order Entry - Copy Order:** A Copy Order feature is available from the Actions menu within Sales Order Entry. The feature copies the current sales order to create another sales order. Everything from the original order is copied except the Quote Number and Job Number values. Multiple releases are not copied either. Only one detail line and one release will be created for the copied sales order.

**Ship from Multiple Locations:** Ship an order from multiple plants and multiple warehouses.

## Demand Management

The Demand Management module lets you more efficiently manage short and long term contracts, turning the demand from these contracts into sales orders and MRP forecasts. You can enter this demand information manually, electronically through EDI, or both. This module's features allow electronic communication of information both to and from your customers. Demand Management handles creation, analysis, editing, and reconciliation of cumulative records for releases from your customers.

**Automated Shipping:** Automatically process the shipping schedules that have no lead time warnings, immediately allowing quantity or date changes. Only transactions that have errors will then be displayed within Demand Entry.

**Contract Changes:** Provides the ability to view the impact of incoming contract changes before accepting them. The system also allows you to accept, revise, or reject these changes and provides you with the appropriate response to the trading partner. If you accept the changes, the program automatically processes all changes on the sales order.

**Contract Quantities:** Is the ability to review the contract quantities with the actual incoming quantities.

**Contract Structure:** Contract structure allows you to have many sales orders, lines, or releases attached or subordinate to the contract.

**Contract Matching:** The Demand Contract Entry program now has matching functionality. Use the fields on the Matching sheet to define how to pair incoming sales orders to existing sales orders. This feature lets you define a pattern of matching for use with each demand contract. You can match sales orders through the following values: Reference, Ship By Date, Quantity, and Open.

**CUMs:** Added functionality to manage and reconcile the cumulative shipping quantity (CUMs) information that is provided by your customers.

**Demand Schedule:** When you have defined the demand you want, you can then schedule it through firm order releases, unfirm order releases, and MRP forecasts.

**Efficient Interface:** An efficient interface and process to manage the volume of data that is possible through long term contracts.

**Forecasts:** Enter forecasts from trading partners to interact with the application's MRP functionality.

**Manual Processing:** You can manually process demand, which means that you will review everything and accept or reject the demand within Demand Entry. You can also accept this demand through a mass review.

## Storefront

**Storefront:** Storefront combines with the Customer Content Pack of Epicor Portal to create a powerful customer-facing integrated commerce solution. The purchase process through the Storefront begins when a customer enters your online store. From there, they can browse a catalog, or check product descriptions, product pictures, graphics, links to additional comments or technical descriptions and prices. You are able to leverage the advanced functionality of Epicor back-office applications to provide customers with special pricing, including customer based discounting. When the customer decides to purchase an item, they simply add it to their shopping cart. Once the order has been placed, the customer receives an order confirmation via e-mail with their order number. Similarly, Epicor Portal serves as a gateway for your customers, sales representatives and partners to access information from your system—from anywhere.

- **Self-Service:** Create a self-service application for your customers to check online status of their shipments, orders, RMAs, field service and invoices.
- **Single Login:** Customers may purchase goods, review accounts, or locate shipments all with a single login.
- **One Process:** Orders placed through the Storefront are processed just like any other order within the enterprise - no new processes to learn.
- **Online Catalog:** Provide an online catalog for your customers to browse—including pictures and pricing.

## Electronic Data Interchange

Electronic Data Interchange (EDI) is the traditional form of exchanging information electronically and is utilized by many mid- to large-sized suppliers to manage their supply chains more efficiently. Epicor 9 EDI provides an interface for managing and exchanging electronic documents with your trading partners. It offers direct integration with your Epicor data, reducing the turnaround time on schedule changes, additions and eliminating potential data entry errors.

The Epicor solution development team is experienced in making EDI work in various environments and can offer enhanced functionality that is tailored to the EDI needs of your business.

**Audit:** Edit and print incoming and outgoing transactions.

**Documents:** Review incoming documents (830 and 850) online and compare to any current open orders.

**History:** Maintain a complete history of all transactions indefinitely.

**Net Change:** Maintain an audit of before and after transaction data with the EDI net change report.

**Trading Partners:** Set up any number of trading partners for both incoming and outgoing documents.

**Transactions:** Supports ANSI X12 and AIAG documents, including: 810 Invoice, 830 Planning Schedule, 850 Purchase Order, 856 Ship Notice/Manifest (ASN).

**Updates:** Ignore, add new or replace imported information into current system sites.

**TIE Commerce/Advanced EDI:** Leveraging our partnership with TIE Commerce, Epicor provides a complete turnkey approach to your EDI needs. TIE Commerce's eVision data mapper, transport and data sync capabilities extend the core Epicor EDI to the host of trading partners you may encounter, taking the guess work out of EDI.

# Production Management

The Epicor 9 suite of production management applications, comprised of Job Management, Manufacturing Execution, Lean Manufacturing and Quality Assurance, uses sophisticated technologies to model your best practices and empowers your shop floor personnel to make the decisions that will result in optimization of your production process.

Whether you are a global, multisite enterprise or a single-site manufacturer, the fundamental need for precise and flexible planning and scheduling exists. Specific functionality (e.g., consolidated purchasing, transfer functionality, and consolidated financials) helps global enterprises manage the complexity of their size and take advantage of the efficiencies that smaller organizations enjoy.

## Job Management

Job Management is a comprehensive manufacturing control solution, designed specifically for the routing, scheduling, costing, and tracking of either custom or repetitive parts manufactured on the shop floor.

Job entry for a repeat part takes minimal effort. Analysis tools provide the quick and accurate reference necessary for re-quoting a part or identifying the types of work at which your company is most profitable.

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

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

**Burden Rates:** Set up burden as a fixed rate or a percentage of labor. Separate setup and production, projected labor and burden rates.

**Customized Views:** Create customized views of the job information relevant to each user.

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

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

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

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

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

**New/Change Order Notifications:** Verify that orders or changes don't fall through the cracks for viewing and selecting new orders and change orders from job entry.

**Online Cost Tracking:** Review estimated versus actual costs by overall job and individual material, subcontracting and operation sequence.

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

**Planned Overproduction of Assemblies:** Produce and auto-receive overproduction quantities to inventory on a job.

**Planning Workbench:** Access all job related actions in a single view - the creation of new jobs, changing job requirements to match changing demand, and allocating and reallocating jobs to satisfy changing customer demand.

**Productivity:** Extensively track and analyze efficiency and utilization figures by employee, operation, resource group, and department.

**Quality Control:** Extensively track and analyze scrap, rework and added operations.

**Scheduling:** Schedule jobs based on forward, backward, finite and infinite capacity.

## Lean Production

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

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

Specific functionality has been developed in Epicor for plant floor operations that are adopting workorderless Kanban manufacturing strategies in part or fully to pull rather than push products through the manufacturing process. Epicor Lean Manufacturing Kanban functionality supports this.

**Manufacturing without work orders (Kanban Flow):** Epicor embedded Kanban functionality (i.e., a signal to manufacture or move product) offers the functionality required to manage several types of systems for Kanban control. As inventory levels or order demand requires additional product, Kanbans, such as manufacturing real-time Kanbans, manufacturing flow Kanbans, purchase real-time Kanbans, and stock replenishment Kanbans, are automatically requested. The Kanban manages the stocking and order demand for parts flagged as needing Kanban control. User-defined rules enable parts to be flagged for Kanban control at the part, warehouse, or individual bin or cell location level.

**Cell-based Inventory:** Manage, plan and replenish materials within a cell.

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

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

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

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

**Automated Material Flow:** Authorize supplying cells to make a predefined quantity of an item being “pulled” by using operations.

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

## Manufacturing Execution System (MES)

The MES or data collection module is useful for shop employees to enter their labor information directly on the manufacturing shop floor. As labor information is applied to jobs and as jobs are completed, the shop floor activity can be recorded and monitored in this module.

**Material Movement:** Different movement transactions are available for you to move a job to stock, move stocked material, or perform different returns to a job or stock.

**MES Access to User-Defined Tables:** You can customize the MES menu by accessing User-Defined Tables. These tables let you create a new custom maintenance form that you can then launch from the MES menu.

**MES Menu:** The MES menu can be accessed via touch screen, by employees on the shop floor, so that they can enter information as work is performed.

**MES Material Handling:** On the Handheld MES - Material Handling sub-menu, there is a Process by Queue ID option. When selected, users are asked to enter a Queue record identifier, which can be done by either typing or scanning it in. Users can then process this queue record.

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

**Work Queue:** The Work Queue is valuable for monitoring what work needs to be done, and who has which assignments for work so far.

## Quality Assurance

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

**Audit Trails:** Capture all the inventory transaction detail that occurs during inspection and DMR processing with the material transaction detail report.

**Corrective Action:** Create and track all preventive and corrective actions online. Complete with due dates, audit sign-offs and unlimited comments, corrective actions provide the detail for follow-up on all quality issues.

**Cost of Quality:** Generate cost of quality reports that show you how much quality problems are costing you. Whether parts are scrapped from inventory, a job or receipt inspection, there is a cost to you.



**Debit Memos:** Create a debit memo in DMR Processing and it is automatically tied to accounts payable.

**Discrepant Material Report Processing:** After failing inspection, create a DMR to provide the MRB with an online queue of parts that need to be dispositioned.

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

**Non-Conformant Records:** Create a non-conformant record (NCR) for all non-conformant parts. From a job, shop floor employees automatically create an NCR when they scrap an end part or raw material. Inventory personnel create an NCR when they scrap parts from inventory.

**Non-Nettable Bins:** Use non-nettable bins to keep parts undergoing inspection or review out of current on-hand quantities.

**Packing Slips:** Print a customizable packing slip to the supplier for all parts returned.

**Review Board:** Disposition parts to the Material Review Board after failing inspection. Online documentation provides a complete audit trail of actions taken by the MRB.

## Advanced Quality Management

Advanced Quality is powered by the IQS. This software is a third-party application useful for collating data that pertains to quality information on your products. Advanced Quality 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.

**Audit and Cost Monitoring:** Keep track of audits, audit results, quality costs, and cost categories using Advanced Quality.

**Customer Communications:** Manage customer contact and communications, such as complaints, questions, suggestions, surveys, and e-mails using the integration with Microsoft Outlook.

**Employee Database:** Manage employee-related items, such as job descriptions, skills, training, change requests, revision history, projects, injuries, infractions, and surveys all in one location.

**Manage Documentation:** Use Advanced Quality to manage documents, products, and processes, as well as equipment and devices, all in one application.

**Quality Management:** Track your data collection, nonconformance's and corrective actions using Advanced Quality.

**Supplier Communications:** Manage supplier contact and communications, such as complaints, questions, suggestions, audits, and e-mails using the integration with Microsoft Outlook.

# Supply Chain Management

Linking the trading partners, process 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 9 provides the most effective coordination from initial raw materials to the ultimate consumption of the finished product by providing the visibility you need throughout your value chain.

## Inventory Management

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

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

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

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

**Cost Tracking:** Separately track material cost, material burden, subcontracting, labor, and burden costing.

**Country of Origin:** Provides the ability, at a part level, to define and then report on the composition, by percent, the specific counties of origin for that part.

**Cycle Counting and Physical Inventory:** Management and control of inventory is critical for both manufacturers and distributors. Furthermore, in some regions such as Europe, the control and counting of inventory on a regular and scheduled basis helps significantly reduce annual audit costs. To meet the needs of these two requirements, the cycle counting module is extensive and contains the breath of functionality and features needed for users to provide:

- Detailed audit control over the selection of items to be counted,
- The frequency over the number of times these items are counted, and
- The tracking, recording, and review of variances for the items counted.

The system will allow for the definition of the number of cycles required, counting of zero quantity on-hand, etc., and the assignment/designation of the items with an appropriate ABC code. In addition, enhancements have been made to the Physical Count processes along with new functionality and associated reports to allow users better control over Slow Moving, Obsolete and Excess Inventory.

**Global Trade Standards:** For companies that are required to work within global trade frameworks, Epicor 9 ensures that you can meet the many international standards. At a part level the user can define the global trade standards for the part (UPC UCC-12, EAN UCC-13, EAN UCC-8, GTIN-14 etc). When codes are assigned to part, a global trade standard bar code can be scanned at any part number field which automatically relates the transaction to the correct inventory part.

**Lot Tracking and Lot Attributes:** Provides visibility for parts by lot throughout the system. Record material received by lot, keep traceable material on-hand by lot, and maintain detailed usage information by lot at every level of the process. In the support of more detailed and complete lot tracking needs Epicor has provided the ability to allow additional lot attributes to be stored for each part lot and the option to allow the system to generate lot numbers based on part specific rules.

Examples of the additional Lot attributes include; Batch, Manufacture Lot, Heat Number, Manufacture Date, Expiration Date, Firmware Version, Cure Date, Best Before Date, etc. For the user at the time of a creation of a new lot they will be asked to define the required Lot Attributes. Once the lot is in the system with the configured attributes they are stored with the lot and stay attached to that part lot throughout the system. This functionality provides competitive advantage to both Distributors and Manufacturers alike. For Distributors this functionality will be able to track additional lot specific attributes against their inventory and for Manufacturers who will also benefit from the new attribute fields they will also be able to rapidly and easily generate unique part specific lot numbers.

**Mass Issue:** Quickly issue all planned materials to a particular job instead of entering them individually.

**Material Backflush:** Backflush materials as quantities are reported complete at the job operation level.

**Multiple Warehouses/Bins:** Track parts stored in multiple locations through warehouse status inquiry and warehouse transfer audits.

**Online Part Tracker:** View parts, purchase orders, sales orders, quotes, and jobs to analyze current requirements and track pending receipts.

**Part Cross Referencing:** This functionality allows the user to create any number of cross-reference codes to a single inventory part. These cross-reference codes could be a Customer's Part Number, Supplier's Part Number, Manufacturer's Part Number, or just a simple internal shortcut. When the cross-reference is for a serial tracked part, then for each cross-reference created, a serial number format can be defined which will then be used when serial numbers are created using the cross-reference item number.

**Part Master Price Breaks:** Set up price breaks, including effectivity date, per inventory part/supplier.

**Physical and Perpetual Inventory:** Enter physical counts, print gain/loss reports and update on-hand inventory levels.

**RoHS:** Restrictions on use of certain Hazardous Substances (RoHS) EU directive instructs companies that sell electronic equipment in the European Union to reduce (under published threshold values) 6 Hazardous Substances from certain types of electronic equipment. The main aim of the RoHS Directive is to prevent hazardous materials entering waste landfill sites. Other legislative bodies in other regions outside the EU have similar restrictions or are planning to implement a similar system including China, Japan, and California. Within Epicor 9 we deliver the ability for parts to have a compliance status in accordance with various legislative requirements and to track the consumption and disposal of those targeted parts. This functionality is equally as applicable to Distributors as Manufacturers and of significant importance in today's green economy.

**Serial Documentation:** Print serial numbers on all outgoing communication with the customer such as the packing slip and invoice.

**Serial Number Tracker:** Serial Number Tracker provides an online view into the movement of the product after the serial number was assigned.

**Serial Number Assignment to Parts:** Assign serial numbers to finished parts and raw materials processed throughout the system.

**Serial Number Formatting:** Format serial numbers as either numeric or alphanumeric and assign the number of characters for the field as well as a prefix.

**Serial Tracking:** Serial Tracking ensures product traceability, allowing for greater control over how the user wishes to control serial tracked parts within the facility. These options range from no serial tracking through to full serial traceability when each move of a part is recorded, and a record is maintained of the lower level serial tracked components that were used in the manufacture of part. For manufacturing companies that have customers in the medical, aerospace or defense sectors, this is an essential requirement. For distributors, a further option with serial tracking is the ability to record serial numbers at the outbound stage only. This option is aimed specifically at the supply chain users that need to record what serial numbers have been shipped to which customers and when, but they do not want the overhead of having to record the serial numbers as the inventory moves around the warehouse or between the manufacturing plant and distribution warehouse where the products are produced in-house.

**Supplier Managed Inventory and Customer Managed Inventory:** Customer and Supplier managed inventory is the ability to hold, control, and record inventory items that are owned by either a customer or supplier. The customer managed inventory is primarily aimed at supply chain /distribution users that store inventory on behalf of their customers and then perform the logistics operation to get the items to their customer's customer. The supplier managed inventory allows for a supplier to store product in the host facility. Only when it is consumed is an actual purchase receipt produced for vendor payment. The facility to self-invoice on receipts will also be available, if required.

**Time-Phased Material Inquiry/Report:** Provide analysis within a user-defined time period on those parts where projected requirements exceed available quantities.

**Unit of Measure:** Base level UOM definitions with UOM Classes and conversions are just a few of the features found in Epicor 9 as well as the ability to allow the user to select the unit of measure in which they wish to hold their inventory. When a part is defined to be tracked in multiple UOMs, then the user will have visibility of how many items they have in the different units of measure. A distributor can stock items, for example, as each, in boxes of 10, in cases of 20 or in pallets of 40 boxes. A user will be able to see exactly how many of each UOM they have inventory and where they are located. This feature is also invaluable to manufacturers that use raw materials that they purchase in different sizes (i.e., 6 x 3 sheets or 8 x 4 sheets, etc.). Once a sheet has been partially used it can be returned to inventory as a half sheet, quarter sheet or in square feet, and within the inventory displays they have visibility of the quantities of each UOM. Both examples provide the user with much greater control over their warehouse and therefore their inventory levels, minimizing on-hand inventory and costs.

**Voided Serial:** Allows for the voiding of serial numbers to ensure they are no longer available in the assignment/selection browser.

## Advanced Material Management

Advanced Material Management (AMM) enables manufacturers 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.

**Advanced Shipping:** Pick and pack orders ahead of time, then relieve inventory when the order actually ships.

**Auto-Invoice:** Optionally create an invoice in Accounts Receivable following shipment to a customer.

**Bar Coding on Demand:** Print tags on demand enabling employees to properly label containers or to create custom labels (via BarTender) to meet customer requirements.

**Bill of Lading:** Print customizable bill of lading forms for your shipments.

**Customer Shipment Tracker:** Track shipments that have been sent to customers.

**Handheld and MES:** Allows for the transaction of work either on a Graphical Touch Screen station or via mobile Radio Frequency enabled device.

**Label Printing:** Labels can be automatically printed from any transaction that occurs within AMM. The Bartender will also assemble labels that originate from the Material Queue.

**Material Handler Interface:** Use an online queue of raw material and WIP parts to manage requests to locate and deliver the right parts to the correct resource at the appropriate time.

**Miscellaneous Shipment Tracker:** View information about miscellaneous shipments.

**Miscellaneous Receipts:** Enter online any miscellaneous receipts to a job or into inventory.

**Packing Slips:** Print packing slips to fill orders to customers or ship parts to subcontractors with general or detailed line comments.

**Part Identification:** Quickly and accurately identify WIP and inventory containers with system-generated bar codes.

**Payment Vouchers:** Create online payment vouchers in Accounts Payable from purchase order receipts.

**Pick Face:** Set up pick face inventories and manage inventory levels automatically for replenishment.

**Prioritizing Orders:** Lets you treat your best customers with the highest priority by automatically allocating inventory to the highest priority orders first. Reserve or allocate materials from stock or directly from a linked job to make certain that you ensure your highest priority customers the greatest care.

**Receipt Tracker:** Track receipts for goods that you have received.

**Reporting Scrap:** Report pieces to good, scrap and non-conforming product from one screen while still clocked into the job.

**Reserving Inventory:** Reserve specific parts in inventory for designated orders.

**Sales Order Allocation:** Manage sales order allocations with greater efficiency and create more effective picking and shipping.

**Scanning:** Eliminate data entry mistakes and increase transaction speed by simply scanning a bar code tag to complete an entire transaction.

**Security:** Ensure that only the right employees are able to update inventory information, including requesting material and reporting pieces.

## Shipping & Receiving

Shipping and Receiving provides a central application within Epicor 9 to monitor incoming and outgoing items, whether they are shipments against an order, subcontract parts being sent to a supplier, raw material being received from a purchase order to a job or into inventory, or filling an order from stock. All activity relating to shipments and receipts can be performed and tracked.

Online transaction processing promotes efficiency and ease of use, while online editing promotes accuracy. With Shipping/Receiving, a consistent interface processes all shipments and receipts in an efficient, accurate and cost-effective manner.

**Auto-Invoice:** Optionally create an invoice in Accounts Receivable following shipment to a customer.

**Bill of Lading:** Print customizable bill of lading forms for your shipments.

**Container Tracking:** Container Tracking provides the ability to track container shipments as well as update the status and due dates of all purchase orders along the way.

- **Container Shipment** - When a container is shipped from the supplier, a notification is received with the actual shipment date, the estimated arrival date, as well as the volume specification of the shipped goods. Based on this information the related purchase order releases can be updated with new due dates and quantities.
- **Container Receipt** - When a container is received, a PO receipt is automatically generated based on the information of the container entered at shipment. With the volume information the expected transport cost can be calculated, which can be used to populated the landed cost information.
- **Container Class** - A container class defines the characteristics of common containers including volume and default cost information.

**Customer Shipment Tracker:** Track shipments that have been sent to customers.

**Flexible:** Divert planned receipts into inventory to receive directly to a job, or vice versa.

**Landed Cost:** Landed cost processing offers significant benefits for those customers who import materials on a regular basis. The cost of freight, insurance and import duties can have a big impact on margins. This functionality will allow businesses to track those costs accurately against the parts to which they apply, ensuring that the selling or assembly price then reflects the true cost of the materials, parts or finished goods.

**Manifesting and Freight Management – AgileNetwork & InSite:** Epicor 9 leverages our relationships with AgileNetwork and InSite Software to provide the freight cost calculations and compliant package labeling for the majority of commercial carriers such as; UPS, FedEx, DHL, USPS as well as Less-Than-Truckload (LTL) and adhoc carriers. Both of these providers are fully integrated with the Epicor shipment process through embedded Service Connect orchestrations.

**Mass Ship:** Optionally mass release shipping lines from orders with same ship-to addresses.

**Miscellaneous Shipment Tracker:** View information about miscellaneous shipments.

**Miscellaneous Receipts:** Enter online any miscellaneous receipts to a job or into inventory.

**Pack and Ship/Pack Out Processing:** The Pack Out functionality adds greater flexibility and control to the shipping process by allowing carton level packing and grouping. Carton specific details such as carton weight and exact carton contents are captured with interfaces to allow manifesting (UPS, FedEx, etc.). The Pack Out screen allows for more of a "grocery store" packing system which requires very little mouse usage for distribution customers who require a very fast and accurate system of tracking carton contents.

**Pack IDs:** Pack ID replaces the term "packing slip" throughout this module. Print pack records to fill orders to customers or ship parts to subcontractors with general or detailed line comments. Pack IDs could be a single package, or carton or the contents for an order. It could also be a record for the contents of multiple orders. And Master Packs can hold more than one Pack ID.

**Pack Out:** The Pack out sheets throughout this module support barcode scanning into the system for easy packing of shipments.

**Payment Vouchers:** Create online payment vouchers in Accounts Payable from purchase order receipts.

**Phantom Packs:** A Phantom pack is a pack whose contents are not necessary to know at a part level. When a Phantom pack case is sent, the ID, weight, and recipient are important, but its contents are unimportant. This functionality uses the following logic:

- In order for a pack to be a Phantom pack, its status must be Closed.
- Phantom packs are not supported with international shipping.
- They cannot be entered as master packs or assigned to current master packs.
- Phantom pack shipments do not send order or part information to the freight Web service.
- Once a pack is freighted, no further changes can be made to it.

**Receipt Tracker:** Track receipts for goods that you have received.

**Seagull Scientific BarTender – Label Forms:** BarTender software is a product of Seagull Scientific. Within the BarTender design application, you create your label or form format in a WYSIWYG interface. These formats are then placed in a directory that is available to Epicor. Labels and Forms consist of fixed data or database variable data and can be human readable or barcode format or both.

- **Auto-Print Integration:** This functionality provides for automatically printing barcode labels upon the completion of defined transactions in the Business Activity Manager program.
- **Label Design:** Integrated label and form printing.
- **Label Printing:** Integrated label and form printing.

**Shipping Labels:** Optionally print customized shipping labels for each order. Labels include the customer's name and address. They can also include the purchase order number, sales order number, and ship via, number of packages, shipping comment and weight fields.

**Shipping Performance:** Generate executive summary of company trends regarding delivery performance, including number of shipments made, percentage of on-time delivery, and average daily variance between customer promise and delivery.

**Subcontract Parts:** Track shipments and receipts of subcontract items online.

**User-Defined Forms:** Create customizable packing slips and shipping labels.

## 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.

An online time-phased material requirements report provides a strategic planning tool to buy the right amount of material - at the right time. With Purchase Management, you can reduce inventory levels, improve on-time deliveries, enhance your cash flow, and increase your profit levels.

**Approved Suppliers:** Approve suppliers for general purposes before anything can be ordered from them. To accommodate customers that insist upon using specific suppliers, Epicor 9 allows you to set up those relationships, and it won't allow you to order from the wrong supplier.

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

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

**Flexible:** Optionally redirect purchases made for specific jobs into inventory at the time of receipt. This flexibility is also offered for items originally purchased for inventory.

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

**Multiple Location Receipts:** Receive individual lines or line releases to different locations for multisite organizations with centralized buyers.

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

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

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

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

**Purchase Order Tracker:** Immediately access all purchase order information via screen inquiry, with multiple search capabilities.

**Supplier Tracker:** Quickly display information about any supplier, including open and historical purchasing transactions.

**Supplier Portal Content Pack:** Leveraging the capabilities of Epicor Portal, the Supplier Portal Pack improves business efficiency by extending traditional boundaries for doing business with suppliers. The Epicor Portal Supplier Content Pack provides interactive supplier facing content that supports strategic goals for improved supplier communication and direct collaboration on day to day business, right from your Web site. Suppliers enjoy 24 X 7 self service and can access, review, approve purchase orders and changes and submit pricing in response to request for quote (RFQ's).



## Purchase Contracts

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

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

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

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

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

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

## Supplier Relationship Management

Supplier Relationship Management (SRM) provides a tool for purchasing agents, or those providing quotes, to request quotes for raw materials or subcontract services from one or multiple suppliers. Request for quotations (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 9 applications.

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

**Data Mining:** Extract data based on any supplier attribute, including ISO certification, location or quality rating.

**Epicor Sourcing:** Extend Epicor SRM with the Epicor Sourcing module providing full reverse auction bid processing with direct supplier participation. Define your criteria, weighting and required supply and let the bidding begin.

**E-mail Integration:** Send and store e-mails related to a supplier, including RFQs, POs and corrective action notices.

**Flexible:** Generate RFQs for raw materials or subcontract services. RFQs can include multiple lines or parts per RFQ with multiple suppliers per line.

**History Reports:** Print history reports and view supplier price or part price history.

**Part Price-Break Tables:** Supplier RFQ responses automatically build part price-break tables for use with other applications.

**Partial Job Quotes:** Pull all or selected parts from a quote or job into an RFQ.

**Review Worksheet:** Print an RFQ worksheet for easy review prior to supplier submission.

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

**Search Capability:** Perform a multiple-criteria search on open RFQs for instant tracking.

**Supplier's Workbench:** Give your supplier the ability to track RFQs and POs online.

**Supplier/Part:** Maintain unique contacts and due dates for each supplier or part.

# Planning and Scheduling

## Project Management

**Project Management:** The Project entry process has been enhanced to support the manufacturing of large capital projects. To achieve this, the Work Breakdown Structure (WBS) Phase has been introduced, which is the equivalent of a Microsoft Project Task. With this a WBS Phase can be created as a child of another WBS Phase thereby providing multilevel phases.

**Revenue Recognition Workbench:** This feature seamlessly integrates with the Project Management functionality to provide an automated revenue recognition process without the requirement for anything to be shipped. This functionality adds the ability for the user to recognize revenue based on the costs incurred and booked in the project analysis records, at any time in the project life cycle and on the agreed contractual revenue recognition processes within your company. Use the Revenue Recognition Workbench to automate revenue recognition and process the various milestones and contractually defined billing points on a project. You can generate journals for revenue recognition based on the costs produced from the Project Analysis during the life of the project. The journals can be reversed once the project is completed.

**Associate Multiple Internal Contacts with the Project:** Identify groups to automatically receive e-mail alerts when important project transactions occur (for example, when a particular project milestone is completed) in addition to identifying critical project personnel.

**Cost Analysis:** Begin cost analysis with the quote. Quoting allows project analysis of potential projects in the design stage, before the project even begins. The project tracker displays real-time costs for all associated transactions, at any stage in the project. Combined with VBI, you have a powerful engine for cost analysis as it offers user-defined costing buckets available per project, customer, and product group, as well as for each part, all materials and labor.

**Invoicing:** Generate progress and milestone billing, so you can invoice your customer and optionally defer the revenue and cost of sale, recognizing them at various stages in the project. Invoices can be generated based on a fixed date, fixed amount, user-defined stage of project completion, or user-defined cost-to-date.

**Microsoft Project Integration:** Epicor supports a bi-directional integration with Microsoft Project. Update Epicor schedules, phases and project tasks from Microsoft Project. Create phases or tasks in Microsoft Project using Epicor phases and tasks. And calculate percent complete. You can also update project and job links, job and phase links, and phase and task links based on information from the Microsoft Project file.

**Project Analysis:** With over 150 predefined project cost analytics, plus user-defined analysis codes, consolidate and extract any project cost metric - including complete rollups of all cost transactions related to the project (for example, job materials, job operations, quote estimates, and sales order information).

**Project Budgets:** Dynamically calculate quoted costs and current estimated costs based on the work breakdown structure. Alternatively, the project manager can enter a budget manually.

**Project Generation:** Define all project components as part of a logical, cohesive plan. A project can be generated at any time, both before and after the contract has been signed with the customer.

**Project Management:** Epicor Project Management integrates cost-effective management, tracking, revision, review, and analysis to simplify and streamline all aspects of project administration. Projects can be generated, modified, reviewed and analyzed - at any time. And project functionality is entirely embedded within Epicor, eliminating the need for additional project management software.

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

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

**Revenue Analysis:** Easily perform revenue analysis for progress/milestone billing. VBI streamlines the process with user-defined buckets for revenue analysis (for example, quoted revenue, current revenue, quoted margin, and current margin). VBI provides a thorough cash flow analysis in a straightforward view that is entirely user-defined.

## Forecasting, Scheduling and Resource Management

Several possibilities must be accounted for during the scheduling process. Each part can have a different method of manufacturing, which creates multiple methods by which operations are handled on the same resource groups. Planned and actual demand on resources can vary from one day to the next. And the availability of materials required on operations can cause scheduling estimates to generate unexpected results, causing jobs to be completed after their original due dates.

Because of these issues, you must estimate the demand required each day or week to make sure that there is enough supply of time or other capacity to complete production quantities by the date on which they are due. Some jobs are also more important than others. For example, a job for a good customer may take precedence over a job manufactured for inventory.

The scheduling engines uses several factors that affect production quantity, setup time, production time, capacity, priority, and so on to calculate how long it will take each job to complete. It then displays the schedule through the Job Scheduling Board, the Resource Scheduling Board, and the Multi-Resource Scheduling Board.

**Base Scheduling:** Multiple resource views and online scheduling tools such as Change Impact Informer offer the master scheduler and management the ability to visually locate overload problems and slack conditions and perform cost and throughput analysis on schedule changes before they are firmly committed.

**Advanced Scheduling:** An extension of scheduling, APS 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.

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

- **Calculate Global Scheduling Order:** This program is a setup process you must run before the Global Scheduling process. Each time this process is run, it will schedule any job that is a candidate for the Global Scheduling process. This process determines if each job will be early or late. This Early Days or Late Days value is then compared against the Priority code value on the job to determine a job priority sequence. The Global Scheduling process will then schedule these jobs in using this generated job priority sequence.
- **Adjust Global Scheduling Order (optional):** This is an optional component you can run. Launch this program to review the job priority sequence that was generated through the Calculate Global Scheduling Order process. You can use this program to manually change the sequence through which these jobs will be scheduled during Global Scheduling.
- **Global Scheduling:** Run this process to schedule the jobs. All the jobs selected by the Calculate Global Scheduling Order process will be placed within the schedule, either on the actual schedule or on a What-If schedule. The jobs will be scheduled in order using either the sequence generated by the Calculate Global Scheduling Order process or the modified sequence you changed within the Adjust Global Scheduling Order program.

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

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

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

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

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

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

**Dual Resource Constraints:** Use a secondary resource constraint (for example, a tool or employee) in finite capacity scheduling in addition to the primary resource.

**Finite Load Horizon:** Prevent the schedule from making adjustments too far into the future - potentially impacting material purchases and resource allocations - with finite load horizons (for example, time fences or cutoff dates) for finitely scheduling load on the resource.

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

**Finite Scheduling:** Schedule and reschedule with flexible, finite real-time schedule capabilities for a single job and plant-wide global finite capacity.

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

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

**Memos on Multi-Resource Scheduling Board:** Add memos to a schedule on the Multi-Resource Scheduling Board about any aspect of a current schedule.

**Minimize WIP:** The Minimize WIP feature lets the scheduling engine reduce the gaps that can occur between operations and assemblies during the Global Scheduling process. It causes this process to run the scheduling engine an additional time against the jobs that meet a specific condition.

**Multilevel Assemblies:** Manage complex assemblies by matching the schedule to actual production output.

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

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

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

**Reschedule Delta:** Optionally automate the software's response to parts that are planned to be early or late by a threshold number of days.

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

**Resource-Based Schedule:** Develop a schedule for each individual resource deployed in the schedule.

**Rough Cut Scheduling:** This lets you schedule a job that only creates dates on the job and operation records. It ignores resource and shop load records that are normally including within the scheduling calculation.

**Rough Cut Scheduling - Save Resource Load:** Use the Save Resource Load program to add load to jobs that have been scheduled using Rough Cut Scheduling. This scheduling method lets you infinitely or finitely schedule jobs without placing any load against your resources.

**Scheduling Technical Reference Guide:** The Scheduling Technical Reference Guide explores how the scheduling engine calculates the schedules for your jobs. The guide examines, in detail, the primary components that make up the scheduling engine, the base calculations that run the engine, and the modifiers that can be used to refine the scheduling results.

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

**Visual Alerts:** View indicators, such as late status as well as material availability, to proactively alert the master scheduler to potential problems in the schedule.

**Visual Production Scheduling Board:** Easily manipulate the schedule with drag-and-drop and drill-down techniques for multilevel assemblies and operation details.

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

## Material Requirements Planning

Material Requirements Planning (MRP) is a set of planning tools that lets you both estimate potential demand and propose the supply that will answer this demand. It does this by generating job, purchase, and transfer order suggestions. MRP is designed primarily for companies that manufacture make-to-stock quantities or mixed-mode manufacturers that run both custom and stock products. Regular use of MRP lets you anticipate the future demand for your company's products, ensuring that materials are in the right place at the right time.

**Available-to-Promise:** View running balances with the available-to-promise function. Enter a quantity, and the system will find the earliest date that quantity will be available. Enter a date, and see how many parts are available on that day.

**Bill of Material:** MRP checks the revision level and verifies approvals before pulling in a standard BOM and routing. For parts that do not have a current approved revision, a job suggestion is created in the new/change order queue, reducing the possibility of forgetting about a requirement.

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

**Forecast:** Enter general part forecasts or specific customer/part forecasts. MRP consumes the forecast with actual orders as they are received.

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

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

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

**Log File:** See what changes were made by MRP in the log file.

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

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

**Material Requirements Planning Technical Reference Guide:** The Material Requirements Planning Technical Reference Guide explores how the MRP engine calculates both job suggestions and purchase suggestions. The guide examines, in detail, the primary components that make up the MRP engine, the base calculations that run the engine, and the modifiers used to refine the suggestion results.

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

**Multilevel Pegging:** Analyze all the supply and demand in your system; then "peg" each supply against demand, prioritized by due date.

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

**Part Planning Tools:** Account for production prep, kit, and receipt and use this time to derive appropriate lead-time for manufacturing the product in addition to cycle times required to produce a product.

**Planning Horizon:** Review the planning horizon of a part or resource and only plan if not beyond the horizon, preventing premature planning.

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

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

- If that day is  $\leq$  Schedule Start Date + Short Horizon Days, then the Short Horizon Days of Supply value will be used for the materials.
- If the date is  $>$  Schedule Start Date + Short Horizon Days then the Standard Days of Supply value will be used.

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

**Sourcing by Plant:** Define a unique source per part or plant - whether its default sourcing is purchased, produced or transferred. What is produced in one location may be purchased - or transferred in - from another.



# Product Data Management

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

Epicor 9 offers a solution for manufacturers that manages the powerful information traditionally contained in engineering documents, plant floor routings, changes, orders and quality documentation, within a single online solution that is easily shared across the enterprise business.

## Bill of Materials

The software supports both traditional BOM management with single-level part formats that recognize the materials and components required to build end parts, and 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.

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

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

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

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

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

**Reference Designators:** Reference Designators are used by the electronics industry to match a schematic to a board layout. You can now create and link reference designators to a specific material within a method of manufacturing. Each reference designator can be added as a series using the Add Range button or entered manually. You can also add XYZ coordinates, rotation, and comment text for each reference designator. Run this functionality to provide explosion reports both by component and also by reference designator from quotes, jobs, and the Engineering Workbench.

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

## Engineering Change and Revision Control

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

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

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

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

## Routings

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

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

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

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

**Subcontracting Services:** Include outside services in routing steps for accurate planning of costs and lead-time.

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

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

## Product Costing

**Costing Workbench:** Manage part costs in a single location. Specialized tools pull in the most recent costs and automatically perform cost rollups.

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

**Cost Rollup:** Generate a new cost for a product with an automated cost rollup based on the existing routing for the product and current cost values for material, labor, burden, subcontracting, and material burden.

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

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

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

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

## Product Lifecycle Management

Product Lifecycle Management (PLM) includes storage, administration and supply of all product-related as well as all supplemental data during the entire operational order processing and thereafter.

PLM is the product data management system that supervises the entire process, the product life history. It interacts with project managers, engineers as well as employees in quality assurance. Foremost support is given to the design department. It provides all required functions for design management, including those for passing work results from the technical designers to the neighboring departments. Workflow management, scan and plot management as well as document viewing in large heterogeneous networks and over the Internet complete the range of powerful PLM features employed.

Most modern knowledge management solutions evolve from a comprehensive embedding of a consistent product data management. PLM meets all requirements for a comprehensive product life cycle management. PLM's modular structure makes it an extremely flexible instrument, which can easily be adapted to the respective requirements in an enterprise.

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

**Document Management:** Documents are usually drafted in a context that is specific to a project or design process. They are part of the product data or the project documentation. Epicor PLM connects product data management with the traditional document management.

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

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

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

## Product Configuration

Product configuration enables on-the-fly configuration of highly customizable and dimensional products via a straightforward question and answer evaluation. Product Configuration can be accessed from Quote Entry, Order Entry, and Job Entry. It is Web-enabled, and is also available to disconnected users employing Mobile Connect.

**Add Comments to Rules:** Within the Configurator there is the capability to add comments to document formulas used when creating the rules.

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

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

**Component Price Lists:** We provide the ability to use the component level price lists as the product is configured.

**Copy/Paste:** Allows users to copy Configurator rules from one module to another (copy/paste).

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

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

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

**Excel Interface:** Optionally interface to Microsoft Excel to map values to tables instead of building complex rules within the configurator.

**Generic Part / Multiple Rules:** Allow use of the same generic Part with multiple rules on multiple assemblies.

**Global Variables:** Provide the ability to hold and use Global Configurator variables.

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

**Keep When Rules:** Allow for a configuration at all levels of a part, but only for the subassemblies that are stored. Subassemblies have Keep When rules.

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

**Multicompany Configured Parts:** This feature enables the system to handle multicompany configured parts with the ability to be able to configure and sell in one company, with the configured assembly being produced in another.

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

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

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

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

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

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

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

# 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.

## Return Material Authorization

**RMA Processing:** Customer contacts may be specified on a return material authorization record.

**Returns:** Handle inventory or warranty returns with a simple transaction.

## Field Service

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

**Automated Dispatching:** Automatically dispatch technician and field engineer resources based on availability.

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

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

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

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

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

**Time and Material Billing:** Easily access online time and material cost data and generate an invoice.

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

## Contract Management

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

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

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

# Human Capital Management

Epicor Human Capital Management (HCM) encompasses a range of solutions that help manage an organization's most valued assets – its employees – in a strategic and coherent manner.

Today's HCM solutions demonstrate the progression beyond the confines of the HR department, core payroll services and human resource management systems (HRMS) to managing and developing talent and labor resources on a global scale, both strategically and cost effectively. Epicor HCM delivers the necessary software support for all employee-related functions whether distributed or centralized. This enables organizations to manage a geographically dispersed workforce in a global manner, ensuring support for various local payroll and legal reporting requirements.

## Payroll

Epicor Payroll handles the processing of all employees' paychecks, and provides necessary company and governmental reporting. Comprehensive employee information and memo fields allow you to track employee personnel information, like performance reviews and outside training. Because payroll is so tightly integrated with Job Management and Manufacturing Execution, you will normally only have to review your payroll entries, make adjustments, print your checks, and then post. With Payroll, there is no longer any need to have your payroll done with an outside service, when it is so easy to do yourself.

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

**Checks:** Preview, print on standard check forms, or reprint in the event of a forms jam.

**Check History:** Keep check history indefinitely to help audit unemployment or other claims.

**Departments/Shifts:** Establish home department and shift IDs for each employee.

**Direct Deposit:** Set up employees for direct deposit. Checks are then non-negotiable, and a direct deposit file is automatically created every time a payroll run is generated.

**Easy Entry:** Easily enter all payroll checks through the new interface.

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

**General Ledger Interface:** General ledger entries are automatically created through the payroll process.

**Magnetic Media Reporting:** Year-end reporting optionally creates an electronic W-2 file suitable for federal filing.

**Pay Types:** Maintain regular, overtime, double time, holiday, vacation and sick, plus unlimited user-defined pay types.

**Payroll Taxes:** Exclude certain deductions, including 401(k) and cafeteria plans.

**Personnel Information:** Track detailed personnel information in the extensive employee memo file.

**Tax Tables:** Set up federal, FICA, state, local, and other tax deductions.

**Transfers:** Transfer hours from Job Management or Manufacturing Execution.

**User-Defined:** Enter and track fields and unlimited memos for each employee.

**Voluntary Deduction:** Define any number of voluntary deductions.

**W-2 Forms:** Print at year-end and store indefinitely.

**UnicornHRO Payroll:** The OPEN4 Payroll and HR system is a product of UnicornHRO and is fully integrated with the Epicor payroll module. In addition to advanced payroll capabilities, this software provides the ability to coordinate hiring, termination, and employee change from within OPEN4; and then have that information propagated to the Epicor employee records. Data established in Employee Maintenance is in an OPEN4 category named Epicor. As a result, complete maintenance of employee data can be done from OPEN4. Note: Applicable to the United States market.

- **Epicor Integration:** With the OPEN4 integration, information about new hires, terminations, or employee changes can be passed to your Epicor application.
- **GL Information Extraction:** General Ledger information can be extracted from Epicor according to your specifications, for a generic general ledger transaction load.
- **Productive Time Extraction:** Shop floor productive time can be extracted from Epicor into the OPEN4 payroll transaction file.

## Human Resource Management

Epicor Human Resource Management (HR) is a comprehensive solution that streamlines your HR processes. It efficiently administers applicant tracking, benefit programs, workforce training and development, complex union dues calculations and benefits, and ever-changing governmental regulations such as EEO, VETS, OSHA, and Affirmative Action Program reporting (AAP).

Online communication via your company's intranet helps your employees stay up-to-date on their benefits, training, and life event changes. An add-on module, Epicor Employee Self-Service is designed for employee satisfaction as well as operational efficiency.

**Visual Display of Absences:** View a calendar of employee or departments to enable management to quickly see potential problems. Detailed record of absences along with reasons ensures a good audit trail needed for performance reviews and regulatory reporting.

**Applicant Tracking:** Control applicant information, interviews and matching to available job vacancies.

**Benefit Administration:** Post-date benefits changes and generate benefit groups to separate salaried, office and hourly paid employees (e.g., use flexible benefit rate tables to define benefit deductions, and manage eligibility).

**Statement of Benefits:** Generate benefit statements for employees using a standardized, modifiable form to accommodate your company's logo and other specific requirements.

**Performance Review:** Regulate performance reviews with user-defined review ratings and matrixes. A complete history of reviews is retained for historical analysis and support for pay increases.

**Skill/Job Management:** Manage jobs with skills, pay, and training requirements. Position control allows incumbent and vacancy reporting and provides a hierarchical view of the reporting structure.

**Employee Transfers:** Oversee employee transfers between departments and divisions in a single step, bringing historical employee information along with the transfer. A complete history of all transfers is maintained.

**Temporary Employees:** Single step termination and reactivation reduces the steps to deactivate employees and improves the lead time for bringing employees back into action.



**Compensation Management:** Manage pay changes and history for employees along with unlimited compensation tables that support grades and steps. Automatic periodic increases and license/ certification premium pay are supported. The system also supports mass pay changes and future dating of pay changes.

**COBRA and HIPAA Letters:** Use standard letters for COBRA and HIPAA which may be edited to your specific requirements using Microsoft® Office Word.

**Union Tracking:** Manage union requirements for merit increases and union dues and benefits. Standard reports for time of service ranking as well as seniority in job. The system easily accommodates custom seniority calculations.

**Robust Reporting:** Access critical HR information with over 150 standard, secure reports. From AAP and EEO to OSHA and VETS-100 reports, the system is packed with reports to better manage employee data "out-of-the-box."

**Payroll SERVICE INTEGRATION:** Choose from the standard ADP, Paychex, or Epicor interfaces, or configure integration with other payroll service providers.

**Employee Self-Service:** Make the most of your company's intranet by allowing real-time employee access to training history, benefits updates, and general employee information. Check history, an add-on to HR, may be available as well, depending on the payroll in use.

**Family Medical Leave Act (FMLA):** Determine eligibility, generate required documents, and track FMLA certifications. The FMLA add-on is an advanced feature set that supports Department of Labor FMLA forms such as WH-1420, WH-380, and WH-381, offering a visual calendar display of FMLA time taken.

## Training and Recruitment

Track your ongoing training and certification requirements online with Epicor Training and Recruitment. The Training module is used to schedule courses and instructors as well as record training history, reducing the pain of your next regulatory audit.

Any organization operating under the oversight of OSHA, EPA, FAA, FDA or similar federal or state agencies is required by those agencies to provide specific training to certain employees on a recurring basis, and to certify that the appropriate training took place. Records must be maintained of training taken and when it was completed.

Training information is integrated with all other aspects of each employee, providing a complete picture of an employee's lifecycle. It includes both internal and external classes, instructors, course outlines, and class scheduling – all captured and retained within the HCM database.

There are many advantages to an integrated approach to training. Epicor HCM already knows each employee's job assignment and therefore can specify the appropriate training for that job and in what sequence the courses should be taken. Employees may query the system through Employee Self-Service to read course descriptions and to see when classes are scheduled. An employee's request for enrollment may also be submitted via Employee Self-Service, and the employee can view his/her training history as well.

The training system automatically creates a record for each student upon completion of a training course. Over time, these records reflect a history of training taken by each employee, when it was taken, and the score or award earned.

As part of an integrated design, training history can also be used as one of the criteria on which to base promotion and succession planning decisions.

## Employee Self-Service

Epicor Employee Self-Service places the responsibility for employee and manager updates on their shoulders, freeing up the HR and payroll department personnel for more strategic activities.

Epicor Employee Self-Service allows access by employees and managers from a kiosk, your intranet, or the Internet. Both Manager and Employee Self-Service are designed to be extremely easy to use, so even individuals with little or no computer skills can easily navigate through the system with minimal effort.

Your self-service system can be customized, using your company's logo, desktop design, layout, colors, etc. A scrolling message board is included, so you can post news and company events, such as open enrollment notices, company picnic announcements, safety statistics, and so on.

**Employee Self-Service:** Your employees can make their own elections during open enrollment without assistance from HR personnel. They can update addresses, emergency contacts, change dependents, and reprint their own W-2. They can display check detail from history, print benefit statements, verify vacation as well as other paid-time-off balances, and more.

**Manager Self-Service:** Managers are able to view selected employee information, post requisitions, initiate pay changes, reassign jobs, and approve time off. A manager can monitor training, upcoming reviews and produce compensation reports covering only their employees. Furthermore Manager Self-Service falls under Epicor HCM security control so a manager can only access those employees who report to them and see just the data that you've approved.

# Epicor Enterprise Performance Management

## Management Reporter

Epicor 9 introduces the Microsoft Office PerformancePoint Professional 2007, Management Reporter application. This is essentially the new version of Microsoft FRx and will carry the same level of support that is currently available for other existing Epicor applications. Drilldown to sub-ledgers will remain an option to be added in a later release.

Management Reporter, a part of Microsoft Office PerformancePoint Server 2007, is a new report writer designed to help finance groups create and generate financial reports that can be distributed across the organization. Management Reporter works directly with Office PerformancePoint Server 2007, the platform on which Epicor is building Advanced Analytic applications, as well as with the Epicor 9 General Ledger ensuring real-time accurate data directly from the source.

Accurate and detailed financial reports can be created in as few as seven steps. A helpful wizard guides finance professionals through the creation and generation of trial balance reports, income statements and balance sheets. Additionally, flexible report templates are provided, which can be adapted to accommodate your organization's chart of accounts or dimensions, thereby accelerating the report design process. Finished reports can also be quickly updated to eliminate the need to create and format new reports each time a new one is needed.

Reports can be quickly organized into folders and multiple versions can be managed all from a single location - a SQL Server-based report library. Security can be defined at the report level which allows you to define access rights specific to each individual report. Users can quickly access the reports to view summarized data, or they can drill down into account or transaction-level details, allowing for immediate interactive analysis.

## Operational Data Store and Data Warehousing

**Epicor Cube Connect:** Epicor 9 introduces Epicor Cube Connect, which allows creation of and manipulation of Microsoft SQL Server Analysis Services (SSAS) standard Star Schemas and inserts a proper security model into on-line analytical processing (OLAP) cubes that are designed. This means that if a user is only allowed to see one company and a number of projects in the back office this can also be reflected in the OLAP cubes. This new capability also includes the uplift of current VBI DynaMarts to Epicor Cube Connect.

**Operational Data Store (ODS):** The ODS database provides read only access for operational reporting and provides data consolidation and cleansing operations to prepare data for use within the Epicor data warehouse, it acts as the sole source of data for the data warehouse. Data from external systems may be integrated into the ODS database to provide external system data into the warehouse. It is also a central read-only SQL Server data store for consolidation of data from multiple Epicor OLTP systems. ODS shares the same core database structure as the core Epicor OLTP Database. Data is provided by the Epicor Replication Server, a change-capture style data replication service, in near-real-time. One or more ODS servers may exist depending on scalability requirements and usage. We also provide a permanent record store in ODS for historical data an operational reporting data source which does not impact OLTP system performance, and a data staging and pre-processing location for the standard data warehouse.

## Epicor Replication Server

Epicor 9 introduces a Replication Server facility that can efficiently replicate all database transactions from the Application Server to single or multiple separate production servers. The Replication Server is designed to offload processing from the main Application Server in support of Enterprise Performance Management (EPM) requirements and will support the following functions: Offline reporting, Offline access to archived as well as live data, Offline Ad Hoc Queries (including those from Epicor Portal/Information Worker), Offload of external system processing (Mobile Connect, Sales Connect etc), Aggregated database holding records from multiple companies across multiple servers and Data transfer for additional business intelligence.

The architecture includes fast data capture based on file triggers, extraction and load into a Progress Sonic queue for transfer and unpack from Sonic and load to Replication databases. Epicor EPM will be supported as a listener to the Sonic queue.

## Scorecards and KPIs

**Epicor EPM Canvas** is natively a web and self-service enabling agile response to new and changing business problems and opportunities - not demanding the deep knowledge of BI professionals - but by business users without any knowledge, using only business terminology. Merging the two disciplines of Performance Management and Business Intelligence, Epicor EPM Canvas not only monitors but aligns and measures an organization against set goals. With Epicor Cube Connect, Published information can be delivered as Microsoft Office SharePoint Server (MOSS) web parts, Web 2.0 AJAX or HTML forms with search and for Mobile devices such as Blackberry and Cymbian.

**Epicor EPM Content Packs:** To give Epicor users an easy way of monitoring and analyzing their different business processes, we have built a number prepackaged content packs.

- **Sales Management EPM Content Pack:** This allows you to perform trend analysis and monitoring of the entire Sales Pipeline. The content pack includes supporting OLAP Cubes and dashboards such as Campaign Pipeline Analysis and Sales Quota Performance suitable for frequent operational performance monitoring as well as detailed trend analysis views of Quotes, Orders, and Sales by Territory, Plant, Customer, Campaign/Event, Salesperson, Part and more.
- **Production Management EPM Content Pack:** This allows you to perform trend analysis and monitoring of production management business processes. The content pack includes supporting OLAP Cubes and dashboards such as Quality Analysis, Plant Performance, and Open Job Analysis suitable for frequent operational performance monitoring as well as detailed trend analysis views of RMA, Non-Conformance, DMR, Projects, Jobs, Materials, and Manufacturing Lead Time by Plant, Warehouse, Customer, Campaign/Event, Salesperson, Work Center, Part and many more.
- **Material Management EPM Content Pack:** Allows you to perform analysis and monitoring of material management business processes including purchasing, shipping, and inventory control. The content pack includes supporting OLAP Cubes and dashboards such as Inventory On-Hand Analysis, Customer & Supplier Shipping Performance, and Inventory Turn suitable for frequent operational performance monitoring as well as detailed trend analysis views of Inventory Transactions by Buyer & Approver, Job & Assembly, Part, Plant, Warehouse and many more.

- **Financial Management EPM Content Pack:** Allows you to perform trend analysis and monitoring of key financial information. The content pack includes supporting OLAP Cubes and dashboards such as Open Accounts Payable, Open Accounts Receivable, and Cash flow Analysis suitable for operational performance monitoring as well as detailed historical analysis views of AP, AR, GL, and Cash flow information by Currency, Customer, Chart of Accounts, Control Code/Type, GL Code, Job & Assembly, Project, and many more.

## Budgeting, Planning and Forecasting

**Microsoft Performance Point Server:** is a comprehensive performance management solution that allows organizations to formulate strategy, drive execution and more effectively monitor performance through integrated monitoring, analytics, and planning capabilities. This also includes integration with Management Reporter so you can do more advanced analysis and forecasting.

Performance Point Server: contains web based analytics with many templates and wizards allows users to quickly build and share scorecards and dashboards. The application also supports Contextual KPIs and reports reflect changes of planning, budgeting and forecasting data.

## Business Activity Query Designer

Use the Business Activity Query (BAQ) Designer program to create personalized queries. You later view these queries through dashboards, quick searches, Epicor Portal Views and BAQ reports. You can also export these queries as .xml or ASCII files, which you can then view and edit in third party applications.

**BAQ from BPM:** Ability to call a BAQ from within a BPM and the ability to use temp tables in conjunction with the BPM.

**BAQ Printing:** Enabled printing of BAQ output through Crystal runtime engine. This effectively eliminates complications with ODBC access in the smart client environment and enables reports to be created directly from a BAQ.

**BAQ Searches:** Added the capability to make BAQ fields available for searches and provide a double-pass approach for additional filtering of data on the server.

**BAQ Wizard / Freeform:** The ability to define a BAQ multiple ways (free form or wizard) with calculated columns in free form, improved wizard performance and the ability to access the BAQ wizard or other BAQ components from other parts of the application (such as customization).

**BAQ to XML:** Ability to specify the BAQ to XML output location.

**Change BAQ Author:** Ability to change author for each business activity query (BAQ), which can only be edited by a single user. This Actions Menu command, however, lets you assign the current business activity query to another user. This new user can then edit the BAQ as needed.

**Custom Queries:** You can create custom queries from the ground up using the Business Activity Query program. This program contains multiple sheets through which you define the query criteria and indicate how the data displays through the executed query.

**Export and Import Queries:** Business Activity Queries (BAQs) may be exported from your application and saved on a personal directory, and then imported back into the application at any time. This is helpful for backup purposes or for BAQs still in progress.

**Generate ASP:** Once you have created or modified a Business Activity Query, you can use the Generate ASP program to turn a query into an .asp page. This page can then be displayed on your web site, and can be updated with current information from your database.

**Graphical Table Linkages:** Provides the graphical representation displaying the corresponding table linkages within the BAQ.

**Standard Queries:** There are many standard queries that Epicor develops and delivers with the application. These queries all begin with the letter "z", so that you can easily differentiate them from queries you create. You can use these queries for dashboards or reports, or copy and modify them to create custom queries.

## Business Activity Query Report Designer

The BAQ Report Designer lets you turn a Business Activity Query (BAQ) into a Crystal Report. You create these personalized queries through the Business Activity Query program; you design each query to pull in a customized set of information from your database. You then use the BAQ Report Designer to select this BAQ as the base for a report -- and also define the option fields, filters, and sort by options that will appear on the report interface. To finish the report, you use the Crystal Reports application to define its layout.

**BAQ Report Tools** Use the BAQ Report Designer to test the report form, generate sample data, design the report using Crystal Reports, and deploy the final report to the servers for general use. Access these tools from the Actions menu of the program's interface.

**Custom BAQ Report:** Create a new BAQ Report through the copy feature, and modify an existing report. Also create a new BAQ Report from scratch using standard or customized Business Activity Queries (BAQs). Design the reports interface components, including the report options, field labels, filters, and sorting criteria.

**Deploy Reports to the Main Menu:** After you design or modify a report, the final step is to deploy it to the Main Menu for general use. This is easily done through the Menu Maintenance program.

**Export and Import BAQ Report:** You can export the current BAQ Report out of the local reports directory to another location, or pull a BAQ Report back into the application when you use the export and import commands in the BAQ Report Designer.

**Standard BAQ Report:** There are several standard BAQ Reports that you may use in that system that were created with the BAQ Report Designer program. These are: Employee Efficiency Report, Rebate Transactions, Resource Group Efficiency and Rebate Contract Summary.

## Dashboards and Trackers

The Dashboard is your personalized information and command center. Much like your car's dashboard gives you current information and controls to run the car, the dashboard can display the current information and processes that you need to more efficiently perform your tasks. The data you choose to display is refreshed periodically, so you will be able to act on changes as they immediately occur. Set up the Dashboard to match your needs. You should spend some time thinking about what information would be really helpful to you, and set up these queries through one of the available views. Then link the processes that relate to this information. Your Dashboard will then become an efficient tool, as you will be able to both view information and then act on it from one location.

**Custom Dashboards:** Copy and modify an existing dashboard definition, or create a new dashboard in the Dashboard program. Pull in standard or customized queries to display the information you need on your custom dashboard.

**Dashboards as Forms:** Epicor ICE 2.0 Dashboards deliver a design environment that creates a definition that can then be used to create a standard UI or can be used to create a Win2Web application. With this model the Dashboard is only a designer and the runtime is generated "external" to the designer.

**Dashboard Tech and User Notes:** There are comments fields where you can document modified and custom Dashboards, or you can flag the Dashboard so the system, as well as the end user, knows which dashboards are delivered.

**Dashboard Charts:** The Dashboard Chart functionality uses the new Infragistics Chart Types. There are now over 40 types of charts that can be displayed through a dashboard. The charting functionality now also contains improvements for filtering, data building, labeling and scaling.

**Dashboard Crystal Reports:** You can link Crystal Reports to a dashboard. Within the Tools menu on a dashboard, there is a new Report Tools sub-menu. Here are the commands on this sub-menu that let you use Crystal Reports:

- Report Options - Select this command to display the Report Options window. Use this window to change the path to the Crystal Report executable (.exe) file. You can also change the Sample Data Directory path and the Local Reports Directory path.
- Design Crystal Report - Use this command to launch the Crystal Report Designer Tool.
- Download Report - Run this command to find and select a Crystal Report to download onto your system. You download files from a Server Reports Directory to a Local Reports Directory.
- Upload Report - Run this command to find and select a Crystal Report to upload to the Server Reports Directory on your system.

**Dashboard Image Column:** The Dashboard Grid Properties window now has an Image Column tab. Use this tab to create an image column within the current grid. You can assign a default image that will display in this column. You can also use the View Rules tab to create one or more rules that define when selected images will appear within this column.

**Dashboard Properties - Disable Refresh All:** The Dashboard Properties window has a check box called the Disable Refresh All check box. When you select this check box, the Refresh All button is removed from the current dashboard. In some situations, like dashboards with many queries and lots of data, the Refresh All button can cause performance issues while retrieving data from the server. Disabling this button improves performance of the dashboard.

**Dashboard Style Sheets:** You can link .xslt style sheets to a Dashboard. These style sheets are linked by using the New URL/XSLT View command from the New menu. When you have the Web Address field link to an .xslt file, you can then bind the Dashboard query to the style sheet.

**Deploy Dashboards to the Main Menu:** After you design or modify a dashboard, the final step is to deploy it to the Main Menu for general use. This is easily done through the Menu Maintenance program.

**Executive Dashboards:** If you have the Executive Dashboard module, you can display executive queries that show data through pie and other chart views, or bar and line graph formats.

**Export and Import Definitions:** Once you have created or modified a dashboard, you can export the dashboard to a local or network location to archive a copy of your work. You can then import a dashboard definition back into any database or company in the application.

**Grid, Chart, and Tracker Views:** Add a Grid, Chart, or Tracker view to customize how query results display data on a dashboard.

**Process Links:** Access process functionality by setting up a link to programs both internal and external to the application, such as Sales Order Entry or Microsoft Excel.

**Publish and Subscribe:** The unique framework of the dashboard publishes data from one query and subscribes to data from another query, which enables you to see related information when you select a record in the dashboard.

**Queries:** Add one or multiple queries to the dashboard to modify the information that appears.

**Report View and Report Link:** Display a report directly on the dashboard through the Report View, or set up a link to a report through Report Link.

**Standard Dashboards:** Many standard dashboards are provided with the application, and are typically in the General Operations folder of each module. The dashboard framework provides you with the opportunity to tailor the way information is presented. Additional features include:

- Totally customizable
- Dashboard components synchronize with system entry programs (publish and subscribe functionality)
- Copy and paste enabled
- Right-click and print enabled
- Display information in graphs and charts
- Conditional formatting based on user-defined rules
- Import and export dashboard definitions

**URL and XSLT View:** Use the URL/XSLT View to display a website in the dashboard using a URL address or attach an XSLT style sheet to customize how data displays on your dashboard.

**Trackers:** Enable users to drill into the finer details of the system. Whether looking for related job or quote information or the status of shipments, receipts or financial transactions, trackers are vehicles for drilling and moving throughout the system. The Dashboard enables businesses to generate their own views of information.



# Tools and Technology

## Epicor ICE 2.0 Business Architecture

Epicor 9 is built using Epicor ICE 2.0 business architecture, which incorporates Epicor *True SOA*™ a unique service-oriented architecture (SOA) that provides unprecedented choice and flexibility in how business solutions are deployed and used by all stakeholders inside and outside of a business.

**Separation of Epicor ICE 2.0 Framework from Epicor Applications:** This is a substantial advance in the way Epicor 9 applications are delivered compared to existing Epicor client-server or even SOA solutions. Epicor ICE 2.0 business architecture is separated from Epicor 9 applications, allowing each to be modified and updated in separation and potentially under differing release cycles. Epicor ICE 2.0 framework components are extracted from application source control and given their own build and delivery schedules resulting in a more robust application development environment that allows staged QA and delivery of Epicor ICE 2.0 to the application developers and to partners using the Epicor ICE software development kit (SDK). Since partners will be able to receive the SDK in advance of the delivery of Epicor 9 applications, they will be in a position to make their application changes in order to coordinate their product releases with those of Epicor.

**Extended Reporting Framework:** The reporting framework within Epicor ICE 2.0 has been extended to allow optional Server based printing. This is done via the creation of an Enterprise (or Server based) printing option for higher end users who want to pay for the associated Crystal Reports, SSRS or other enterprise software to support this.

**Tool Tips:** This feature provides for user controlled (on or off) fly-over text-based tool tips.

**Indication of Attachments, Memos, Audits, etc.:** This new feature makes it visible to users when memos or attachments are present. Attachments are now handled in the framework as they are maintained within the dataset.

**Date and Time (Using Server Time) and User Name for Auditing:** Epicor ICE 2.0 introduces a true date time field which involves the creation of a Microsoft SQL style date/time data type or data control that can then be used by application developers to easily render local time. All date fields are now of this date/time data type and are only stored in universal date format.

**Field Level Help:** Introduction of a “quick” viewer to display Field Level Help embedded in a Sheet but available to be docked or torn off as an independent window. If docked, then help can be setup with a pinned or un-pinned capability that allows it to slide out / slide back when the sheet is activated. The quick viewer also supports Links and provides Rich Text functionality (colors, variable fonts, bold, italics, etc).

**Embedded Customization Help:** Epicor ICE 2.0 adds a “help property” to each control available in UI customization. When field level help is requested, the text in the Help property is added or merged into the standard field level help prior to display. This also allows text to be run through standard translation logic before being merged into standard help, enabling customers and partners to create multilingual field level help. This feature also allows help to be customized and modified by Partners and end user Customers. Help customizations are “layered” in much the same way that UI customizations are layered. Epicor Help content is used as the base and then can be amended by a Partner (or Epicor Custom Programming) using the verticalization or productization layer, which can then be further updated by the end Customer.

**Multicompany Menu:** This is a new Epicor ICE 2.0 feature that provides access to multiple companies without having to close all forms when switching companies.

**Centralized Administration Console:** This combines all previous admin consoles into a single management area, which removes redundancy and in so doing boosts user productivity, accuracy and efficiency.

## Personalization

Each user has different needs. Some users want the columns on a grid placed in a different sequence. Others need different options available on a program's status bar. Still others need a program to verify data after they perform specific actions. You set up the Epicor application to reflect your individual needs. The Epicor Personalization Tools let you modify each program's interface. You can personalize every program that you use; this lets you refine the interface to better match the tasks you perform every day.

**Important:** Personalization's are saved with your User ID; they do not affect any other users on the system. If you wish to change every user's interface, you must customize the system.

**Favorite Groups:** All the shortcuts are organized by Favorite Groups. The system comes with some default groups, but you can add and remove the groups to reflect your needs.

**Interface Layouts:** Each Epicor program has an interface made up by sheets, toolbars, and grids. The personalization tools allow you to change the default positions of both sheets and toolbars. You can also modify what is displayed on each toolbar, and even create your own custom toolbars. You can also modify grids to display their information in the format that you need.

**Options Window:** The main center for creating and maintaining you personalization is the Options window. You save all your toolbar, sheet, tree view, and grid personalization's with this program. There are also several preferences within each program that you can define; you select these preferences on the Options window. To access this window, you first must launch the program you wish to personalize. Once the program appears, click on the Tools menu and select the Options command.

**Reset Layouts to Base:** What if you decide you do not want to keep your personalizations? Each program has a command that will undo all your modifications. To return the program the original interface, select the Tools menu and then the Reset Layouts to Base command.

**Save Personalization's:** To record your personalization's periodically, click on the Tools menu and select the Save Layouts command. Before you close the program, make sure the Save Settings on Exit check box is selected on the Options window. The next time you launch the program, your personalizations will appear.

**Shortcut Bar:** The Shortcut Bar is displayed on the left side of the main interface. This toolbar displays shortcut icons to both Epicor programs and external programs. When you double-click on the icon, the program is launched. You add and remove shortcuts on this bar.

**View Menu:** You personalize the main interface through the View menu. This menu lets you select what elements are displayed on the main interface when you first launch the system. You can hide various panes in the main window, as well as select different program icons.

## Styling and Themes

The Styling and Themes application gives you complete control over the look and feel of the entire user experience through its styling functionality. You can use this tool set to display a pre-built design, or theme, from the options installed with the application. These tools also let you edit an existing theme and create a new theme. The styling functionality works by letting you manipulate the look of each item, or component, within the interface – buttons, check boxes, fields, and so on. It gives you complete control over the look of each component, as you can update the different states in which they are displayed. For example, you can create multiple button states - normal, selected, pressed – in a graphics program and then add these various states as the default look for all buttons within the application. Since you are updating one user interface definition, or UI role, the changes you make are displayed globally throughout the interface.

Your updated or new theme can then be made available to everyone within your entire organization. This tool set contains export and import functions, letting you pass along your revised or new theme to whomever you want. Use the styling functionality to create a user interface that is unique to your company, departments, users, and so on. By refining the look of existing themes or creating new ones, you can transform the application to display an entirely different look and feel.

**Load Style Theme:** Use this program to quickly preview the look and feel of the interface by loading in any pre-built, new, or updated Theme during the current session of the application.

**RunTime Styler:** This is the primary tool of the Styling functionality. This tool lets you change the appearance of every component within the user interface. You can then see this change immediately, as the interface is updated while the application runs. This will help you decide if you like, or do not like, the change to the interface.

**Style Tracking:** This is a tracking mode you activate that lets you find out the details for a specific interface component. This tool will help you complete your new or updated theme.

**Theme Maintenance Wizard:** This tool lets you manage all the themes available for your client installation. Use this tool to add, activate, and delete themes. You can also select a specific theme to be the default for your client installation.

## Epicor Portal

Epicor Portal ends the game of relying on IT to anticipate, interpret and provide valuable business insight within an online Portal or reporting infrastructure. In short, Epicor Portal empowers the users who find value in the information they seek. Epicor Portal is not about delivering a new portal architecture. It is about rich, compelling content on the leading portal infrastructure—Microsoft® SharePoint® Technologies. SharePoint has effectively commoditized portal infrastructure in the marketplace and lowered associated IT overhead. Epicor Portal adds value by producing SharePoint compatible Web Parts with role-based security and easy end-user authoring. Roles + Access + Security + Personalization + SharePoint equals Epicor Portal.

Epicor Portal consists of two major components: the Epicor Administration Console, a Microsoft Management Console for maintaining roles and security settings for portal content consumers, and the Portal Server. These components interact with the application databases to create views, which can then be published to Microsoft SharePoint (either Windows SharePoint Services or SharePoint Portal Server), or exported to a variety of other formats, such as a Microsoft Excel® spreadsheet or XML. Secure portal access to information across Epicor applications is only the first step. Data discovery and data visualization within SharePoint Web Parts empower information workers to build and share key performance indicators in addition to ad-hoc online queries. Subsequent content

packs differentiate Epicor Portal further by encapsulating business processes, workflow, alerting, and transactions into specialized SharePoint Web Parts.

## Web 2.0

**Epicor Everywhere™ Framework:** Epicor ICE 2.0 will allow generation of asynchronous Java and extensible markup language (AJAX) web browser-based forms from XML metadata derived from existing Epicor 9 Windows forms (C#.NET). To do this, we have built a browser framework which allows web forms to be generated from meta-data of business logic. These web forms closely mirror Windows forms derived in the Epicor 9 application. AJAX Web forms will run in Microsoft Internet Explorer (IE) or Mozilla Firefox browsers. While it is our intention to deliver as much browser-based functionality as possible, there are a few functional areas that are particularly complex in nature and will not be supported by Web forms (e.g., Job Scheduling) with the first release of Epicor 9. This type of functionality will remain in the domain of the Windows smart client.

**Enterprise Content Management:** Epicor 9 introduces phase one of our Enterprise Content Management (ECM) strategy with attachment/document management capabilities extended to include use of Microsoft SharePoint (SQL Server) document repositories. This will mean that document versioning is also supported along with the option to integrate to other best-of-breed document management systems.

**Presence:** Epicor 9 forms support presence so that users can see who else is available to collaborate with from within the application, and will provide a variety of means to carry this out. Such collaboration, such as Instant Messaging (IM) between users with the ability to pass a Process ID and Key or Set of Keys along with the message supports the need for greater communication with audit trails, and so strengthens our governance risk and compliance (GRC) story. For example, a user may see that a co-worker is on-line and IM them as follows "Hey Joe, please take a look at this order [120938]. Can we engineer this by Friday," creating a response of "Yes, that is fine" and the complete conversation is recorded against the order as event history.

**Enterprise Search:** Enterprise Search creates tag clouds of Epicor information in order to support retrieval "Google-style" of both un-structured (Word documents) and structured (Epicor data) content in a secure manner. Epicor ICE 2.0 Enterprise Search will support extensible actions from search results including task specific actions, internal and external web service calls and direct links to applications or application forms in context.

**Composite Applications:** Epicor ICE 2.0 supports a business's needs for composite application development or "mash-ups." Unique Win2Web technology allows Web forms to be deployed alongside other web mechanisms via distinct URLs in containers such as Epicor Portal based on Microsoft SharePoint products and technologies. An example of this would be a composite application created by connecting transactional web parts from Epicor Portal with analytical web parts from Epicor EPM and with Epicor web or internally developed line of business web forms.

## Support for Software as a Service

Epicor ICE 2.0 delivers new capabilities to truly offer software as a service (SaaS) support within Epicor 9 applications. SaaS availability is not totally reliant on Epicor ICE 2.0 and specifically the Epicor Everywhere Framework, but it is believed essential to its success. With the release of Epicor 9 and its underlying foundation (ICE 2.0), Epicor expands and introduces key attributes necessary for SaaS.

**Extended Services Orientated Architecture (SOA):** ICE 2.0 fuses Web 2.0 concepts with next generation SOA capabilities to provide improved scalability, flexibility and end user experience.

**Multi-Tenancy:** With the introduction of ICE 2.0 the architecture supports multiple customers sharing a single shared instance of the application.

**Metadata Configuration:** Enables Epicor 9 applications to be customized to meet the different needs of customers on a single code base, including modifying the user interface, workflow/business rules and data model.

## Searches

Search programs are available throughout the software. Use these programs to find and select specific records to open within another program. Each search program lets you filter and organize the search results through record-specific criteria.

**Advanced Searches:** An Advanced Search is a dashboard that you can access to search for related data from a standard search window. This is similar to the "Like" fields in the BAQ Searches, but the data displays as a dashboard, and opens in a separate window on your workstation. Use the dashboard to search for specific data, select a record, and pull the record back into the original program from which you initiate the search.

**Business Activity Query Searches:** You can also use Business Activity Query (BAQ) Searches throughout the system to search for related data. These searches are created in the BAQ program by selecting "Like" columns. When fields in your query are "Like" column, and the same field is used for searching in various system programs, the BAQ displays as a search option within the search program.

**Named Searches:** You can create a series of pre-set search options using the Named Search functionality. You launch these searches manually from the Named Search drop-down list found within each search program, or set up a specific Named Search option as the default for the search program. You can also automatically populate data within either the search program or its parent entry or maintenance program using Named Searches.

**Quick Searches:** The Quick Search functionality is a dynamic tool useful in improving the productivity of searches. You create configurable searches that you can then use within your own user account, or share publicly with other users.

**Standard Searches:** Search programs are accessible throughout the application. Easily locate and organize records using filters and specific criteria in any available search program. Define sorting or starting values, as well as specific terms, when performing a basic search.

## Business Activity Management

The **Business Activity Management (BAM)** is a communication tool that you can use to track data changes by monitoring fields from selected tables within the database. As users enter and update data, an event is triggered. BAM's then communicate this data event through change logs, global alerts and automatically printed reports. You can also set parameters for when events are triggered, to limit the scenarios that generate the logs, alerts, or reports. Use the Change Log to view changes that were made to records throughout the database. These logs let you track a list of data updates that were made to pre-selected areas of sales orders, purchase orders, jobs, parts, and so on. You define which fields from these records you want to monitor, so only changes that are important to your business processes are tracked. Global Alerts are e-mail messages that are automatically sent to a specific user or a defined group of users when certain events occur within your company's database. For example, you can set up a global alert that sends an e-mail out to your sales staff when a sales order is placed on hold. Global Alerts can also create system memos when these events occur. Several default global alerts are provided by the application, but you can use the Business Activity Manager to create your own custom alerts.

**Auto-Print Reports or Labels:** The Auto-Print functionality lets you automatically print out reports and labels when changes you define occur within the table. This data is automatically sent to a printer – giving users either a preview or a hard copy print out of the labels or reports.

**BAM Rules:** You can define when these BAM events are triggered by setting up a series of rules. These rules define conditions that limit how often change logs are updated, global alerts are sent and auto-printing is activated.

**Change Logs:** Use the Change Log option to view changes that were made to records throughout the database. These logs let you track a list of data updates that were made to pre-selected areas of sales orders, purchase orders, jobs, parts, and so on. You define which fields from these records you want to monitor, so only changes that are important to your business processes are tracked.

**Custom Global Alerts:** Global Alerts are e-mail messages that are automatically sent to a specific user or a defined group of users when certain events occur within your company's database. For example, you can set up a global alert that sends an e-mail out to your sales staff when a sales order is placed on hold. Global Alerts can also create system memos when these events occur. Several default global alerts are provided by the application, but you can use BAM to create your own custom alerts.

**Custom Procedures:** You can extend BAM global alert functionality by creating procedure (.p) programs. These programs let you automatically generate tasks, create .xml files from the changed data, and update data within multiple records.

## Business Process Management

**Business Process Management (BPM)** allows you to create workflows that automate, execute and monitor business processes. The workflows extend your system's base functionality without requiring customizations or affecting your ability to take future releases of the software.

**Actions:** An action is an operation that is executed when the specified conditions have been met. Like the condition statements, actions are predefined templates that allow you to choose how the Method Directive affects the system.

**Condition Statements:** A condition statement is a template that tests for a certain condition, but allows you to fill in the blanks so that you can control when the system will execute the Method Directive. Next, you can add one or more pre-defined actions.

**Data Trigger Directives:** BPM has been extended to allow directives based on data triggers. This is a major enhancement of BPM that introduces a new UI and replaces the existing Business Activity Manager (BAM) processing. All functions of the BAM will be present in the new data trigger-based BPM.

**Holds:** Set a flag on a record. By itself, a hold does nothing. However, method directives can check for a hold on a record. If the hold is present, they can execute a variety of actions, including cancelling the execution of a base method.

**HTML E-mail Support:** Provides support for HTML e-mail formats.

**Informational Messages:** An action is now available for method directives. This action is "show informational message based on the designed template". When you use this action, it will display a message in a separate window. If an exception is raised, however, the informational message is not displayed.

**Method Directives:** Intercept methods. Add custom logic to perform actions before, after or in place of a method. Most of the power of BPM comes from Method Directives. You can create Method Directives using an interface that is similar to the Microsoft Outlook® Rules Wizard. As you create the Method Directive, you can add one or more pre-defined condition statements.

**Multilingual E-mail Templates:** Provide support for multilingual e-mail templates.

**.Net Action Content:** .NET Action Content The CallContext object is now extended to support these properties:

- string MfgSysType {get;}
- string PlantID {get;}
- string CompanyID {get;}
- string UserID {get;}
- string SessionID {get;}
- string LanguageID {get;}
- string DefaultUnitOfMeasure {get;}
- IPropertyBag PropertyBag {get;}

**Password Security Option:** Optionally, a password prompt can be initiated for security compliance.

**Property Bag Support:** This functionality is a collection of string values. Each value is identified with a string key, and can be leveraged to pass user-defined information among directives with the same business object method.

**Query Dialog Preset:** Allows for a BPM to conditionally present a query dialog to the client (or Web client) that may be used to direct further BPM actions and flow to the method call.

**Service Connect Integration:** Users can create an empty template Service Connect workflow to the client. To do this, users click the Create New button on the Select Workflow window.

**Simultaneous Row Update:** Epicor ICE 2.0 allows for the simultaneous update of changed (or “dirty”) rows and is in support of the new BPM method directives.

**Variable Storage of Data Element:** Provides a variable storage capability for property settings will be introduced that can be used to share data across different BPM conditions and actions. It will include the ability to pass global variables between pre- and post-processing.

**XML Data Node:** A new XML data node will be added to BPM messages would contain things like calling client, process ID, customization ID, and BPM prompt information. This new data area can be used for contextual information about the BPM message and extended by partners and customers using BPM.

## Epicor Service Connect

Service Connect provides a powerful and flexible environment to support specific collaborative processes, connecting different business entities, applications, or users. Service Connect harnesses the power of XML, electronic message transfer and transaction based processing environments to deliver reliability with ease of use. For example, EDI applications like TIE Commerce™ or a similar provider are linked to Epicor 9 through Service Connect, letting you pull in sales order demand from both customers and purchasing schedules from suppliers. This application improves your company's efficiency by reducing repetitive data entry and re-entry tasks. For example, processing sales orders typically involves multiple availability inquiries, reviews, inventory release decisions, and so on. Moving this process within Service Connect can eliminate many of these steps by routing processes to automated tasks, such as order-submit-direct-to-pick for specific inventory items or order fulfillment for your customers.

**Convert Data:** Create conversions to transform a set of data from a specific source format to a specific target format.

**Custom Workflows:** Use the Workflow Designer to define custom workflows, which allow employees to focus on value-added activities and management by exception, instead of repetitive data re-entry tasks.

**One-Stop Administration:** Work with the Administration Console to define the connectivity processing options for Epicor Service Connect (ESC).

**Transform Data:** Use the mapper tool to generate XSLT code used by the data conversion.

**Unified Processes:** Service Connect is built to support processes connecting different business entities, applications, and users. It also automates tasks and processes within the application to promote lean principles, continuous performance initiatives, and quality for an organization or across the supply-chain.

## Epicor Advanced Print Management

Advanced Print Management integrates doc-link software with the application, which is made by Altec. Advanced Print Management is an "out-of-the-box" efficiency tool that transforms paper documents, forms, and reports into electronic documents that can be delivered in a multitude of formats. Documents can be delivered via e-mail, fax, or FTP. Electronic deployment of quotes, invoices and purchase orders eliminates expensive administrative downtime.

**APM Plus Sub-Module:** Advanced Print Management Plus provides repository capabilities to index and easily locate previously distributed documents. Advanced Print Management also provides supplemental document linking to streamline distribution; for example, when a packet of documents - such as a job traveler and corresponding documentation - need to be distributed concurrently. Additional features include:

- **Archive Documents:** Electronically archive distributed documents for easy retrieval.
- **Document Links:** Link core documents together for easy distribution and printing of multiple docs at the same time. For example, a traveler or packing slip can be distributed with associated certifications and drawings. Additionally, the AR invoice can be e-mailed along with the associated packing slip.
- **Document Search:** Scan documents and link to existing records in the application. This provides the ability to easily place external documents such as certifications or vendor paperwork in the repository for searching or using as a supplemental document.

**Color Prints and Scans:** You can print both application documents and scanned documents in color.

**Document Distribution:** Dynamically distribute documents, as Advanced Print Management reads the e-mail or fax number directly from the virtual document to determine distribution method and delivery.

**Document Management:** Easily fulfill customer requirements for documentation by specifying per document receipt method.

**Document Splitting:** When printing multiple invoices at a time, let APM individually analyze and manage each invoice by preferred distribution method.

**Microsoft Office Integration:** More features from the Altec application are now supported. The Office Integration feature set can be leveraged for more document management efficiency.

**Multiple Data Formats:** Multiple data formats, including HTML, CSV, XML, text, and PCL.

**Multiple Image Formats:** Multiple image formats, including PDF and TIFF.

**Multiple Output Methods:** A variety of output methods, including fax, e-mail, FTP, print, and file.



## Customization

You can customize nearly every program within the application. A powerful tool, customizations can save you time and money, as these modifications let you directly match the application to your business needs. The application offers you a variety of customization tools. You can add controls like text boxes and lists – which are then linked to a data source you can select. You can also create new sheets that you can make available to all users, specific users, and even different companies. You can also activate your own customized code through events or new buttons; this feature lets you run processes that are unique for your company.

**Embedded Dashboard Panel Wizard:** The Sheet Wizard has a tool that lets you place a dashboard within a new sheet. This tool is the Embedded Dashboard Panel Wizard. Use this wizard to find and select the dashboard you want to place on your new sheet. When you switch your customization to Run Mode, the dashboard will be displayed on the new sheet.

**Export Customizations:** When you export customizations outside of the application, you make this customization available to anyone you want outside of your network. If you have a relationship with another company that uses Epicor that would like this customization, you can send it to them.

**Grid Customization:** Adjust grid sizes and turn on Snap to Grid functionality. These features are available in two locations:

- The Options program - These features are located on the Designer Grid tab. This is a personalization feature.
- The Customization Tools Dialog - These features are accessed by clicking on the Tools menu, highlighting the Options sub-menu, and selecting the Grid Settings command. This is a customization feature.

**Image Column Row Rule Wizard:** The Image Column Row Rule Wizard lets you both create an image column and then add the row rules you need to the column. This step by step tool can be used instead of the Image Column Wizard to add an image column to a selected grid. It is available both on the Rule Wizard and on the Tools menu.

**Image Column Wizard:** The Image Column Wizard allows you to add an image column to a selected grid. You will first create the column; give it a name and label, and then select the default image that will then be displayed on the grid.

**Multiple Customizations:** You can develop multiple customizations for the same program. This lets you create customizations for specific users; you later set up each user account so that the specific user can view and use this customization. For example, you have two users that purchase specific items. One user purchases spare parts, while the other user hires subcontractors. You can customize the Purchase Entry program so that one user will have a spare parts purchasing sheet, while the other user will have a subcontracting purchase sheet.

**Revert to Original Format:** If your customization does not work or if you no longer need it, you can always revert the program back to its original standard configuration. You and your consultant should spend some time analyzing the needs of your company and then customize the application to match these needs.

**Toolbox - New PictureBox Control:** Click this tool to create a frame that can then display a graphics file. You can then write custom code that will display the image you want within the picture box.

**Work in Process Stages:** You can save your customizations as Work in Process stages. This feature lets you save at different levels of development, so you can reload a previous stage if your customization is not working correctly. Your customizations are also initially available in a test environment, so you can make sure the customization works properly before you release it to users.

## Globalization and Localization

Global support is a key concept within Epicor ICE 2.0 and we are introducing a number of localization features including new toolbars and dropdown list boxes to facilitate user currency management and reporting. The Epicor ICE 2.0 customization engine has been extended to include a separate localization layer. Creating a separate framework localization layer makes version migration easier for customers and localization partners and provides an area within the framework and application for the development of local add-ons which go beyond the needs of the base application.

**Language Translation:** The application contains translation tools that allow you to select the language displayed throughout the interface. You can change the language that appears during each session. You can also assign a default language for a selected user or a specific program. This flexibility lets you use the language that best fits your personnel in specific locations and workstations.

**Language Maintenance:** Use the Language Maintenance program to install the language on your application server. You then deploy this language to your client installations. When the language is added to your application you can display it wherever you need.

**Translation Utility:** You can further update a translation through the Translation Utility. This tool allows you to translate selected strings or labels within the current program. This functionality is also where you can enter regional, localized terms that were not installed with the imported language file.

**User Entered Language Elements:** To accommodate multilingual countries, you may enter and maintain descriptions, such as part descriptions and terms and conditions, in multiple languages throughout the system.

## System Management

The System Management module is important for setting up system-wide information, such as configurations, processes, maintenance and other system administration tasks.

**/RPT Run Time Argument:** Use the /RPT argument to give the application multiple printer options. When active, the application first checks to see if a default printer is selected on a Crystal Report definition. If it is, this printer and its settings are automatically used to print out the report.

**Configuration:** Use this module to setup your system configuration information. Examples of configurations include accounts payable, accounts receivable, asset management, general ledger, company records, CRM, data collection, field service, help desk, internationalization, inventory, job, MRP, orders, payroll, purchasing, quality assurance, quote, shipping and receiving.

**Context Menu Maintenance:** The Context Menu Maintenance program lets you both personalize and customize context menus throughout the application. These menus appear when you right-click on specific fields; they are frequently used as a short cut to launch related entry programs, trackers, and search programs. With this customization tool you can:

- Add new program menu items to a selected context menu.
- Add new search menu items to a selected context menu.
- Initially the context menu changes are saved as personalizations to your user account. If you need, however, you can update this context menu throughout your application.
- Create new context menus that you can then attach to fields when you are in customization mode.

**Report Style and Report Data Definition:** The Report Style Maintenance program now lets you specify an Output Location. This location will override the default location for Bartender and EDI reports. If an Output Location is not defined, the reports are automatically printed to these locations:

- MfgSysData/Bartender
- MfgSysData/EDI

The Report Data Definition window now lets users specify a Report Style for a Rule, instead of the Report Template. This means that some Report Style parameters are applied when rules evaluate to TRUE - like the Report Template Location, the Output Location, and the Report Options.

**Customization/Personalization Maintenance:** The

Customization/Personalization Maintenance program lets you manage all the customizations and personalizations on your system. With this program you can:

- Review the details on each customization or personalization, including the Product ID, Version, Last Updated By, Form Name, and Parent Layer.
- Delete the customizations that you no longer need.
- Delete all the personalization's that were created for a specific employee. This feature is useful, for example, when an employee has left your company.
- Select a customization as being a Work in Progress. This prevents the customization from being used within the application before it is ready.
- Export a customization that you wish to use elsewhere.
- Import a customization that you want to incorporate into your application.

**Verify Customizations:** This functionality lets you test if your customizations and personalization's work properly. This verification tool can review all the custom fields and code within a selected customization/personalization or a group of customizations and personalizations. It then informs you whether or not the customization/personalization is valid.

**Run Mode/Developer Mode Access:** You can immediately launch a customization/personalization in both Run Mode and Developer Mode within Customization/Personalization Maintenance. You can use these functions, for example, to discover why a selected personalization or customization is not working properly.

**Verification Warning:** When users attempt to launch a customized or personalized program that is not compatible, an error message is displayed that prevents the user from launching the program. Customization/Personalization Maintenance can then be used to upgrade the program. If the customized or personalized program is compatible, however, no error message will appear and the user can run the program as expected.

**External Company Maintenance:** Functionality is available on the Actions menu within External Company Maintenance. This menu option is Initialize all Global Parts, Customers, and Suppliers. When you select this option, all global records are updated to display current information within the application.

**Implementation Checklist:** The Implementation Checklist program is enhanced to let you search for a specific form; you launch this search function from either a button or a context menu. When you define a form, the selected program (form) can then be launched directly from this section of the checklist. To previously set up this feature, users would need to directly enter the specific Form ID.

**Maintenance:** Use this module to maintain system-wide maintenance information. Examples of maintenance areas include custom field maps, database records, menus, process calling, report data, report styles, sub process menus, system agent and system monitor applications.

**Other System Tasks:** Use this module to view system-wide information, such as the Data Dictionary, Integrated Table Workbench, and the Implementation Checklist.

**Processes:** Use this module to setup system-wide server processes. Examples of processes include BAQ exports, credit card keys, fill shop capacity, generic integration, global alerts/e-mail server and multicompany server.

**Sales Connect:** Within the Sales Connect application, you can add Alternate Bill To locations to customer records.

**System Configuration:** The System Configuration program provides control at the plant level.

## Software Development Kit

Within the Epicor ICE 2.0 software development kit (SDK) users can make changes to underlying business processes via the Object Designer. This will allow users to tailor the system to meet their needs while at the same time tracking these changes as they represent a functional change to the software application that might need to be tracked for governance and compliance auditing. This is a significant addition to the customization options within the application framework.

The customization capabilities within the framework, all designed to improve the user experience and provide flexibility within the system, include the following features:

- A base method in all business objects called UpdateFullDS has been created that simplifies and improves performance on update actions for large datasets.
- A specific user interface for editing user-defined accounting rules is available through the use of a dropdown list in a grid. The grid provides a means for viewing and editing user-defined algorithms that are expressed in a sort of basic “programming” language. This approach uses a tree structure to navigate the hierarchical accounting rules.
- Additional UI customization wizards are available to streamline the use of the customization and personalization engine. The ability to allow “visual behavior” for a field or set of fields has also been developed. This capability will be extended to include the setting of behaviors for fields in any defined view based on complex comparisons.
- Enhanced support for Partners and Custom code in addition to visual hooks, partners have the ability to use their own controls in the Epicor customization framework. This also makes it easier to take an Epicor patch and run custom created UIs that have been compiled against the previous release.

# Epicor Documentation and Content Delivery

As with any investment in enterprise software the associated documentation and education content is as important as the delivery of the software itself. Epicor offers an approach to documentation and content delivery that puts relevant, context driven information in the hands of stakeholders and end users. This comprehensive solution set shortens your return on investment while maximizing utilization of your investment in Epicor.

Epicor deploys a worldwide team of dedicated content writers and trainers to bring together the feature summary, online help, technical reference user guides, online training courses, and online tutorials through a single-source technology. To ensure maximum utilization of the features of the Epicor suite we have deployed a number of features within the application giving you the tools and knowhow to succeed.

**XML-Based Content Delivery:** Built on XML DITA technologies, the team pulls information from a unified content library to create deliverables with consistent tone and structure. Creation of deliverables is more efficient, as one writer can seamlessly reuse content generated by another writer, making creation of deliverables more efficient and thus provide cost savings for both creation and translation.

**Feature Summary:** Understand the impact of updates to every line of the business. Feature summaries provide comprehensive role based help that explains business cases alongside impact topics for rapid adoption of new releases.

**Online Help/Field Help:** Comprehensive online help that is tied to the application function they are using reduces frustration from users and optimizes performance.

**Intuitive Field Level Help:** Epicor ICE offers a “quick” viewer to display Field Level Help embedded in a Sheet but available to be docked or torn off as an independent window. If docked, then help can be setup with a pinned or un-pinned capability that allows it to slide out / slide back when the sheet is activated. The quick viewer also supports Links and provides Rich Text functionality (colors, variable fonts, bold, italics, etc).

**Customizable Help:** Users have the option to display help for a specific field where field definitions, field specifications, or both can be added. Epicor ICE provides a “help property” for each control available in UI customization. When field level help is requested, the text in the Help property is added or merged into the standard field level help prior to display. This also allows text to be run through standard translation logic before being merged into standard help, enabling customers and partners to create multi-lingual field level help.

**Layered Help:** This feature also allows help to be customized and modified by partners and end user customers. Help customizations are “layered” in much the same way that UI customizations are layered. Epicor Help content is used as the base and then can be amended by a partner (or Epicor Custom Programming) using the verticalization or productization layers of the Epicor Layered Client Stack, which can then be further updated by the end customer.

**User Guides:** Epicor User Guides provides a complete overview of the major functions within Epicor. These printable documents offer full color explanations of system functions and walk users through the system, step-by-step. In addition to an application user guide, there are guides on Epicor Business Architecture, Epicor Business Architecture user experience and customization, and Epicor Service Connect.

**Technical Reference Guides:** The Technical Reference Guides provide detailed instructions focusing on technical audiences. Epicor offers technical reference guides on scheduling, material requirements planning (MRP), product configurator, job costing, and the posting engine.

**Embedded Courses:** Courses are embedded within the Epicor application to simplify role based learning and optimize deployment.

**Customization Toolkit:** The Customization Toolkit allows users to leverage standard content by editing according to their business processes. Users can add annotations to topics on the same tab as the help content. Course content can also be made available for larger deployments with advanced customization requirements.

# About Epicor

For over 20 years, Epicor has been a recognized leader dedicated to providing leading edge enterprise software solutions to midmarket companies around the world. With over 20,000 customers, Epicor delivers end-to-end, industry-specific solutions that enable companies to immediately improve business operations and build competitive advantage in today's real-time global economy. Epicor's comprehensive suite of integrated software solutions for Customer Relationship Management, Financials, Manufacturing, Supply Chain Management, and Services Execution and Control provide the scalability and flexibility to support long-term growth. Epicor's solutions are complemented by a full range of services, providing a single point of accountability to promote rapid return on investment and low total cost of ownership.

## **Disclaimer**

This document and its contents, including the viewpoints, dates and functional content expressed herein are believed to be accurate as of its date of publication, September 2008. However, Epicor Software Corporation makes no guarantee, representations or warranties with regard to the enclosed information and specifically disclaims the implied warranties of fitness for a particular purpose and merchantability. All information contained herein is subject to change without notice. The usage of any Epicor Software shall be pursuant to an Epicor end user license agreement and the performance of any consulting services by Epicor personnel shall be pursuant to Epicor's standard services terms and conditions. Epicor is a registered trademark of Epicor Software Corporation. All other trademarks acknowledged. This document and its contents are the property of Epicor Software Corporation. Recipients of this document should not distribute to any third parties without Epicor's prior written consent. Copyright © 2008 Epicor Software Corporation.



Worldwide Headquarters  
18200 Von Karman Avenue, Suite 1000  
Irvine, California 92612  
USA  
Toll Free: +800.449.6772 (US/Canada)  
Phone: +952.417.5207 (International)  
[www.epicor.com](http://www.epicor.com)