



MANUFACTURING

EPICOR



# Epicor Kinetic



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# CONTENT

**05**

Customer Relationship Management

**08**

Sales Management

**18**

Product Management

**23**

Project Management

**29**

Planning and Scheduling

**37**

Supply Chain Management

**44**

Production Management

**56**

Service and Asset Management

**59**

Epicor Financials

**77**

Business Intelligence and Analytics

**85**

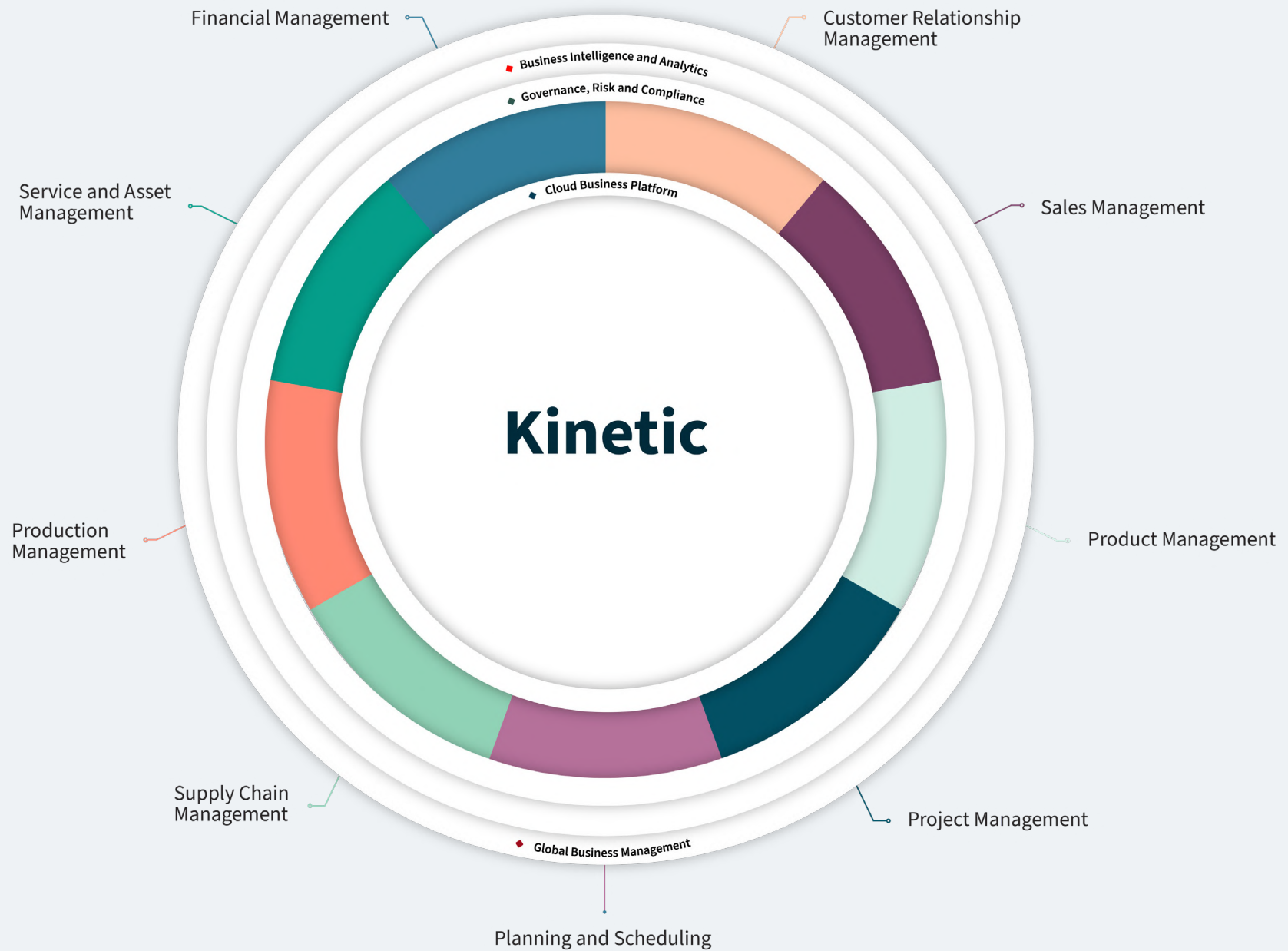
Global Business Management

**92**

Governance, Risk, and Compliance

**95**

Cloud Business Platform





## Financial Management

- Global Engines
- General Ledger
- Accounts Receivable
- Accounts Payable
- Tax Automation
- Financial Reporting
- Financial Planning and Analysis
- Credit Card Payments
- Cash Management
- Credit and Collections
- Asset Management

## Customer Relationship Management

- Epicor Contact Management
- Epicor Marketing Management
- Epicor Lead and Opportunity Management
- Epicor Case Management
- CRM Mobile
- Integration to Salesforce.com\*

## Supply Chain Management

- Purchase Management
- Supplier Relationship Management
- Supplier Portal
- Inventory Management
- Epicor Advanced Materials Management
- Advanced Unit of Measure
- Shipping and Receiving
- Epicor Quick Ship
- Epicor Warehouse Management System (WMS)
- Supplier EDI and B2B Integration

## ◆ Cloud Business Platform

- Mobile, Browser-Based Experience
- Epicor Automation Studio, Powered by Workato: iPaaS + Automations
- Epicor Virtual Agent
- Epicor Collaborate
- Enterprise Search
- Epicor Learning
- Epicor Business Process Management (BPM)
- Epicor Enterprise Content Management (ECM)
- Business Workflow Automation
- IoT and IIoT Applications
- Epicor Commerce
- Epicor ED and B2B Integration
- Electronic Reports Engine
- Epicor Application Studio Configuration
- REST Services and Epicor Functions
- Updatable Dashboards
- Epicor Integration Cloud
- Deployment Flexibility
- Microsoft Azure Cloud
- Security Management
- Data Fabric

## Sales Management

- Estimate and Quote Management
- Order Management
- Sales Order Automation
- Epicor EDI/Demand
- Management-Point of sale
- Epicor Commerce
- Dealer Portal
- Epicor CPQ

## Product Management

- Bill of Materials
- Routings
- Engineering Change and Revision Control
- Document Management
- CAD Integration
- Product Lifecycle Management
- Product Costing
- Product Configuration

## Production Management

- Epicor Job Management
- Advanced Production
- Kanban Lean Production
- Data Collection
- Epicor Advanced MES
- Quality Assurance
- Epicor Quality Management System (QMS)

## ◆ Business Intelligence and Analytics

- Operational Reports/Dashboards/IIOT/OEE
- Descriptive Analytics (Business and Financial User Reporting/Dashboards)
- Diagnostic Analytics (Scorecards/KPIs, Financial Planning)
- Predictive Analytics (Forecasting)
- Data Warehousing
- Role-Based Analytics and Business Intelligence
- Mobile Business Intelligence

## Project Management

- Project Planning and Analysis
- Project Generation
- Project Billing
- Resource Management
- Contract Management
- Planning Contract
- Time Management
- Expense Management
- Epicor Advanced Project Management (APM)

## Planning and Scheduling

- Forecasting
- Master Production Scheduling
- Smart Demand Planning
- Epicor Material Requirements Planning (MRP)
- Scheduling and Resource Management
- Advanced Planning and Scheduling

## Service and Asset Management

- Field Service
- Epicor Field Service Management (FSM)
- Returned Material Authorization
- Service Contract and Warranty Management
- Epicor Case Management
- Maintenance Management

## ◆ Governance, Risk and Compliance

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

## ◆ Global Business Management

- Multicompany Management
- Multicurrency Management
- Global Multisite Management
- Multilingual Data Management
- Master Data Management
- Scalable, Distributed Deployment
- Global Engines





## ○ Customer Relationship Management

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

CRM can control every aspect of a company's interaction with its customers and prospects including generating the lead, developing the opportunity, taking the order, producing

and shipping or supplying the goods or services, payment, and ongoing support of the customer. CRM helps provide a 360-degree view of the complete customer, supplier, or partner relationship. CRM broadens the scope of customer information to everyone within and across the organization and to stakeholders beyond.

Epicor Collaborate further enhances CRM, delivering up-to-date contextual information to key stakeholders for the life of the customer relationship. Customers, prospects, and partners can interact to share information to target high customer satisfaction

- Contact Management
- Marketing Management
- Lead and Opportunity Management
- Case Management
- CRM Mobile
- Integration to Salesforce®.com



## Contact Management

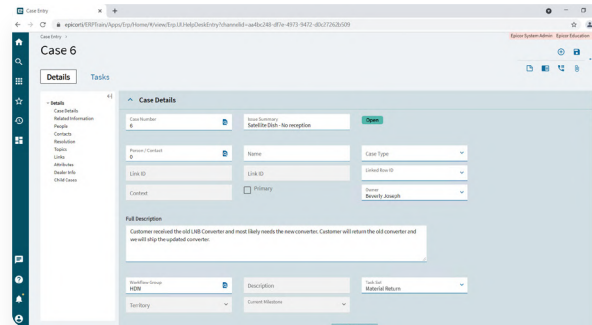
Keep in touch with your customers and prospects by promoting responsive, respectful, and proactive communications. Contact Management enhances your customer service by documenting and sharing customer communication with the entire organization, while helping to manage contact interactions through task management. You'll improve overall focus and responsiveness by putting your contacts at the center of your business.

## Marketing Management

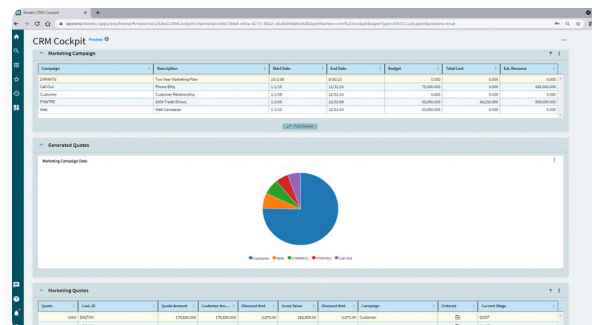
With eMarketing and Advanced Surveys by Sensorpro, you can effectively distribute important communications to your employees, partners, prospects, and customers. Manage the entire campaign cycle through a highly flexible, easy-to-use web user interface that integrates with CRM. You can import contacts, create targeted emails, and measure the success of your campaigns.

## Lead and Opportunity Management

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



*Case Management—Shorten service response time by collecting detailed product problem information and using integrated features to initiate requests to the appropriate resource.*



*Lead and Opportunity Management—Easily manage leads and opportunities for accurate sales forecasting and pipeline analysis.*

## Case Management

Improving the productivity and responsiveness of your support center is an essential component of building industry-leading customer satisfaction. From initial call to resolution and follow-up, Case Management helps provide a customer-focused solution for personalized, high-quality service. This comprehensive, one-stop solution comes equipped with time-saving links to customer-focused activities (e.g., new quotes, orders, RMA requests, or service calls), plus a search-driven knowledge base and case-driven workflow for standardizing case resolution. In addition, Case Management is integrated with the Service Management's Field Service module for easy access to dispatching field activities, online answer books, existing customer field service calls, warranty information, and service contracts.





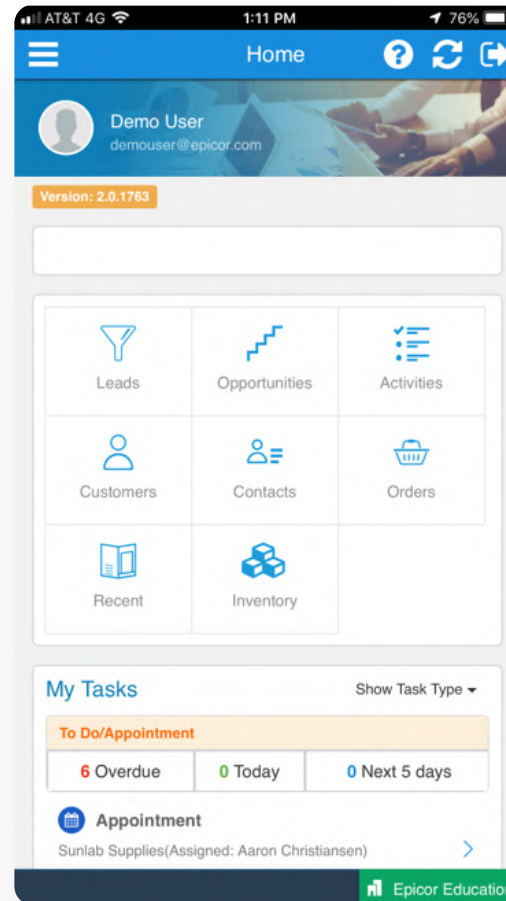
## CRM Mobile

Keeping your customers the focus of your business today means responding to their requests in a fast and efficient way. The CRM Mobile application empowers your salesforce by providing mobile access to the entire CRM suite of capabilities on iOS™ and Android™ devices. Through CRM Mobile, you can manage leads, customers, contacts, and quotes, from opportunity to order shipment. Generate activity-based workflows like call and email logging, notes, “to-do” lists and appointments, while implementing your back office task workflow. Access data related to competitors, cases, projects, and order history—even without internet connectivity. You can also, visualize your customers and prospects on a map while in the area, then get travel time and directions to the selected location.

Never miss a sales opportunity again. Search your inventory to verify product availability, create Sales Orders (even from Opportunities), and finally ship them to your customers—all from the mobile device of your choice.

## Integration to Salesforce.com®

Integrating Salesforce with Kinetic amplifies the value of each application by increasing data accuracy, allowing widespread automation, supporting new use cases, and enabling a more efficiently run business. Epicor offers a comprehensive and fully managed turn-key Salesforce integration solution, along with robust cloud integration solutions with pre-built connectors to accelerate interoperability between Salesforce CRM and Kinetic.



*With CRM mobile, you can manage the sales cycle from opportunity to order shipment—anytime, anywhere.*





## ○ Sales Management

The Epicor Sales Management module has a comprehensive suite that helps you produce accurate estimates, streamline your order-to-cash cycle, and fulfill orders, helping ensure world-class customer satisfaction. Epicor Sales Management automates and improves labor-intensive processes for quoting, proposal generation, configuration, and order entry—allowing you to improve sales productivity by increasing accuracy during the quote and order process while identifying the right solution to meet customers' needs.

- Epicor Estimating and Quotation Management
- Order Management
- Sales Order Automation
- Epicor EDI/Demand Management
- Point of Sale (POS) by Precise Business Solutions
- Epicor Commerce
- Dealer Portal
- Epicor CPQ







## Epicor Estimating and Quotation Management

Easily generate and track all customer or prospect requests for quotation (RFQs)—from the time of receipt until an order is placed. Prepare estimates and get quotes out quickly with more accurate pricing and lead times using a wide range of powerful tools.

### Estimating Management

Generate cost-based estimates easily using the tree interface to drag and drop components, operations, or materials from another quote, Bill of Materials (BOM), or previous job. Pull same-as-except-type parts into the estimate, then modify them quickly and easily to come up with a new estimate. Calculate material, subcontract, labor, and burden costs for multiple quantities of a part. Perform realistic cost estimating with the ability to add any special charges (e.g., tooling or design), minimum lot charges, price breaks, and scrap factors on materials and subcontracting. Specify and store individual markups for material class, subcontracting, operations, and special costs. Create RFQ requests to trigger buyers to solicit suppliers for pricing of materials required in the estimating process. Review responses once submitted for inclusion in the estimate. When the order arrives, punch a few keys and the detailed routing will be ready to go to the floor or to make additional changes.

### Collaborative Estimating

Connect with engineers and other subject matter experts from the field. Epicor Collaborate helps to drive more accurate and timely estimates by enabling engineers to be part of a group that sales and estimators can collaborate with electronically. Share knowledge

and discuss best options for customers leveraging up-to-date ERP information.

### Quotation Management

Manage the sales cycle with dynamic task lists that help ensure the right people are working on the quote at the right time. Use the Part Advisor to drill down into the quote/job/ part status and history to answer critical questions related to a part:

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

Instantly query summary and detailed information on an estimate/quote. Check inventory availability and easily cross- reference customer part numbers to your part numbers automatically during the quoting process. Send quotes to prospects, even if they don't exist in the customer file.

Quotation management capabilities include:

- Standard routings
- Drag-and-drop interface
- Realistic cost estimates with minimum lot charges, price breaks, and scrap factors on materials and subcontracting
- Inventory availability
- Request supplier RFQ
- Markups by category

## SecturaSOFT

Our partnership with SecturaSOFT offers SecturaFAB, an integrated metal fabrication estimating and quoting application that drastically speeds up turnaround times for estimates and quotes. It helps provide powerful nesting logic and data visualization tools that address historically labor-intensive and time-consuming processes. SecturaSOFT also offers a solution for printing and packaging organizations called SecturaPAQ.

## Pipeline Management

Accurately predict pipeline activity by tracking the confidence levels (e.g., best, worst, most likely) by quote line with the ability to perform management overrides to optimize forecast accuracy. Track all competitors to find out where you are winning and why you may be losing.

## Order/Job Integration

Increase efficiency and accuracy with the ability to quickly transfer quote information to a sales order or job. Built with tremendous flexibility, there are multiple ways to process an order and job from an existing quote such as:

- Push to an order by the line item
- Flag as won, automatically generating an order
- Pull from Order Management with the capability to define specific lines and quantities desired

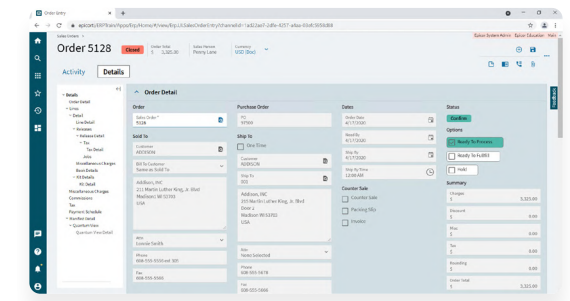
## Order Management

Order Management drives the Epicor system. From the time an order is entered, its progress is tracked through final shipment, producing order fulfillment on demand for maximum customer satisfaction. The Order Job Wizard generates 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. Effectively manage orders with the ability to apply order-based discounts on an order value or product quantity basis. Optionally override and lock pricing. Check customer credit status online at quote entry, order entry, and shipment entry. Using blanket orders establish multiple releases (either firm or not firm) for each sales order line and pull parts directly from inventory. Optionally lock the order line quantity allowing new releases to decrement the final delivery quantity on the final delivery date, keeping the total line quantity in balance with the release. Simplify repeat orders with the Copy Order function including the ability to optionally build a new order from history or see previous orders and enter the quantity on the order form. Use Available-To-Promise to view running balances during order entry. Enter a quantity, and the system will find the earliest date that quantity will be available. Enter a date, and see how many parts are available on that day.

Counter Sales allow you to automate the pick-up, shipment, and generation of sales invoices for walk-in customers. Additional capabilities include:

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

- Application for payment may be required from a different customer than the customer order/receiving the goods or bill third parties, such as a customer of your distributor.
- Manage sales commission calculations for direct and indirect sales teams.
- Allocate commission percentage over multiple sales entities per order line.
- Generate customer, product group, warehouse, and products specific pricing hierarchies, while matching the end-user currency. For global enterprises, company, plant, and warehouse pricing offers flexibility in pricing products.
- 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.
- Link sales orders to Projects.



*Order Management—Manage sophisticated sales requirements from the time an order is entered until final shipment*

## Sales Kits

Flexibility in selling items in kits includes configured item kits, optional price rollup and item substitution, mandatory ship complete, and optional printing of kit components on the packing slip and invoice. Use the answers from the kit master to “on the fly” configure individual kit components, automating kit instructions for features like style, color, and size.

Configure a Kit within a Kit functionality—this supports the ability to define multi-level configured sales kits that include non-stock components generated on a job or purchased direct for the kit, alongside stocked components.

## Selling Dimensional Products

Selling items with many dimensional attributes can be complex and make it difficult to implement ERP. For these manufacturers and distributors, the Epicor Advanced UOM module that lowers the complexity of implementation by reducing the amount of configuration needed to fit these unique needs. The Epicor Advanced UOM functionality gives users a simplified approach to finding the right inventory by segmenting inventory attributes such as hardness, strength, modulus of elasticity, or density. Because the inventory is segmented, it is easily located, physical counts are more meaningful, and the business can plan inventory needs at the attribute level, helping ensure accurate supply and demand are met.

## Upsell, Cross-Sell, and Downsell

Improve order accuracy and ability to enhance sales with upsell, cross-sell, and downsell capabilities.

At time of sales order entry, users are prompted with suggestions for “Upgrades,” “Downgrades,” “Substitutes,” and “Complements.” Whether substituting the original part with an upgrade or downgrade or adding complementary products, improved customer satisfaction alongside enhanced sales is the return.

## Capable-To-Promise

Help provide accurate, real-time delivery dates to customers when using APS. Furnish a realistic promise date to your customers by finding out how a quote would fit into your current schedule. For multilevel structured products, Capable-To-Promise can be configured to make the sublevel assembly structures in addition to the top-level assembly.

## Fulfillment and Allocation Processing

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

Fulfillment Workbench also allows a planner to manage make-to-order finished goods. Make-to-order line items will show the percentage complete and available to be reserved and released for picking, all in the Fulfillment Workbench dashboard.

## Order Shipment Parameters

Define order shipment parameters with Order Management, helping ensure all orders and changes are effectively managed online. This helps to perfect the order-to-delivery process for maximum customer satisfaction. Set up the appropriate shipping parameters including the ability to:

- Track multiple ship-to addresses per order release.
- Ship an order from multiple plants and multiple warehouses.
- Do a one-time shipment to an address in Order Entry.
- Drop ship and buy-to-order, providing the ability from within a sales order to define a part as being buy-to-order. This may or may not be defined as a drop ship item. In both cases, the purchase order will be linked to the sales order directly.
- Automatically generate backorders for lines that are shipped incomplete. Flexibility enables customer-specific backorder parameters for complete order lines or complete orders to be set.
- Validate ship-by and need-by dates in the shipping calendar.



## Epicor Payment Exchange

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

## Order Monitoring

Use order tracker to see a summarized view of the order, drill down on selected items to see greater details (e.g. lines, releases, shipments, charges, bookings, audit, and payment information). Monitor and track changes to orders using Epicor Collaborate. Easily subscribe to notifications about changes to orders without building BPM controls. View a summary of all the changes to the order in an activity stream inside or outside Kinetic, or receive social media style updates via email or directly in your browser.

## Sales Order Automation

Sales order entry is part of nearly all manufacturing operations, setting the tone if not the speed for the entire process. Too often, sales order entry is done manually, which is labor-intensive and time-consuming, costing valuable employee resources, depending on the complexity of the order. Differences in the way orders are received—whether via mail, fax, or email; as paper, PDFs, spreadsheet, or other electronic files—adds to the confusion and creates opportunities for errors. Since sales order entry is a critical part of the sales transaction, it makes sense to automate the process and eliminate many of the errors associated with manual sales order entry. A module in the Epicor ECM suite, Sales Order Automation (SOA), takes the extra work and worry out of sales order entry.

The process is as follows:

- **Capture**—Epicor Intelligent Data Capture (IDC) captures and extracts sales order data such as customer, order data and line items.

- **Validate**—SOA performs a data lookup in Kinetic to confirm customer, quote, and other validations. Data exceptions are passed to a worker to resolve.
- **Process**—If all conditions are met, the order is created in Kinetic.

**Note:** Refer to the [“Cloud Business Architecture”](#) chapter for more information about the Epicor ECM suite of products.

## Epicor EDI/Demand Management

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

A wide range of EDI implementation choices are available to match your company’s needs, making it possible to preserve much of your investment in Epicor EDI setup and existing staff.



## Demand Management

A component of the embedded Epicor EDI/Demand Management module, Demand Management starts with a “contract” setup per customer with such agreed-upon parameters as pricing, initial demand schedule, and contract end date. The contract is then linked to incoming purchase orders, forecasts, and shipping schedules. These contracts can be managed, and schedules produced, automatically with set periodicities or schedule constraints that match each customer’s unique shipping needs. Additionally, as changes happen, the schedules can be updated, with these recent changes matched to existing sales orders, which are then updated accordingly.

You can use Demand Management without Epicor EDI. If the solution is deployed, your customers’ electronic demand changes are brought in automatically for system review and acceptance into sales orders or to help with forecasts in your Kinetic system, according to parameters and tolerances you specify. This is especially important for companies doing business in automotive and other industries like industrial, consumer products, retail, and aerospace and defense.

Demand Management lets you streamline processes in a variety of ways:

- Attach many sales orders/lines to the contract using the Demand Contract structure.
- Use Demand Entry Management Console to support one inbound purchase order at a time, or your options can be tuned for more automated entry into the Kinetic system.
- Establish demand settings per trading partner to include tolerances, such as for allowable time windows when schedule lines can be added or deleted or changed, tolerances for price variations, parameters for matching changes against existing sales orders, and functions for reconciling shipped quantities between you and your trading partner. Automated Demand Management processing can be set to always process in spite of tolerance errors, process with warnings, or to stop when an error is encountered.
- Use Demand Mass Review to manually match incoming forecast and shipping schedule changes to existing forecasts and sales order lines in the Kinetic system. Configurable matching algorithms help to speed up the matching process.
- Manually generate sales order release schedules based on defaulted customer periodicity (interval setup) and release quantity. Automatically close rejected schedules from the customer record.
- Review balances as well as proposed quantity of proposed schedule.
- Manage and reconcile the cumulative shipped quantity. Validate cumulative quantity discrepancies by customer and choose to “Stop” or “Warn” and then allow the received demand to be turned into a valid sales order—this feature includes Cumulative Variances Reporting. The Demand Reconciliation screen helps in the cumulative matching process with the ability to easily make reconciled quantity adjustments. Cumulative quantities are tracked at the order and shipment levels over the life of the contract.
- Schedule forecasted deliveries that can be utilized with Epicor MRP to predict demand for resources and provide guidance on pending demand for materials.
- Periodicity (Interval Setup)—Specify rules by plant or plant/supplier for automatic purchase schedule suggestions. Periodicity rules can be specified as Daily, Monthly Forward, Weekly Forward, and Nth Day of Week.
- Capable-to-Promise—Set up the system to review open contracts and capacity requirements for a product and automatically adjust the new demand requirements after reviewing against open contracts as well as available capacity.
- Support for Allowance and Charge Codes—Optionally receive and process allowances and miscellaneous charges within EDI transmissions from trading partners. Both flat amounts and percentage based charges are available.
- Automated Order Match Validation—Automatically cancel demand releases received that are not matched to a specific order release.
- Close and Process Schedules—Use a single step to automatically close and process all schedules within Demand Management.
- Contract Start and End—Manage contracts effectively with contract start and end date.

## Epicor EDI Standard Transactions

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

**Note:** Refer to the “[Cloud Business Architecture](#)” chapter for more information about the Epicor EDI solution for EDI and B2B integration.



## Point of Sale (POS) by Precise Business Solutions

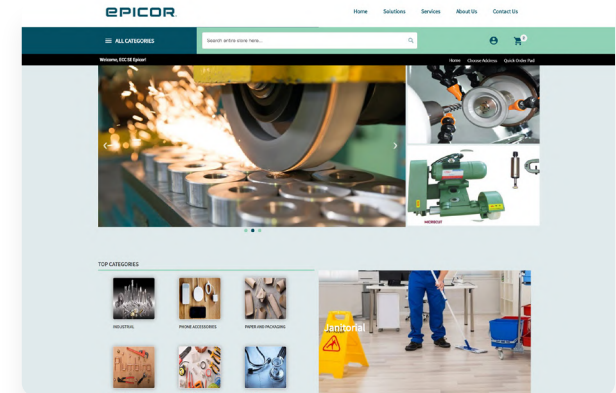
POS extends the power of your Kinetic solution to a customer-facing sales environment— whether you’re an organization with a single POS station or a large, multinational chain with hundreds of stores. POS helps provide a feature-rich system that empowers store personnel to provide an enhanced customer experience.

Comprehensive functionality includes electronic gift cards, gift receipting, customized receipt per transaction type, coupon redemption/issuance, layaways, special orders, suspend and resume, item marking for various functions, additional input fields, multicurrency, start/end of day functions, cash management, and more.

## Epicor Commerce

The increasing proliferation of eCommerce likely means that more of your customers are looking online to solve their business problems, which means that providing customers with the ability to buy online from you is just a start. Your website must provide an experience that truly does solve problems, or better yet, inspires them in some way to keep coming back.

Whether your website serves business-to-consumer (B2C), business-to-business (B2B), or both needs, it requires strong functionality and must use the latest technology to give customers the best possible online experience. Epicor Commerce helps provide everything your website needs to serve your customers throughout the buying process, from initial quote to fulfillment to service.



*Epicor Commerce is always a click away for a great customer experience and additional revenue potential.*

The key advantage of Epicor Commerce is its deep integration with Kinetic. Epicor Commerce negates much of the risk that goes with using a non-integrated eCommerce solution by getting all of its information directly from the ERP platform. All transactional data flows seamlessly between Epicor Commerce and Kinetic: product information, customer-specific pricing, inventory levels, and more, can be viewed online via Epicor Commerce.

Multiple Epicor Commerce offerings are available, giving you a choice of capabilities to match your current digital online strategy, as well as the ability to upgrade as your business grows.



- Express—Quick-to-implement B2B online customer self-service portal that enables buyers to view RFQs, invoices, and more.
- Base—B2B and B2C eCommerce functionality includes multiple themes, fixed payment options, standard implementation hours and “certified extensions”.
- Signature—B2B and B2C eCommerce functionality that speeds and simplifies site development while expressing your brand visually and memorably. Includes customized Mega Menu and enhanced categories for an improved user experience.
- Advanced—Develop custom functionality and/or themes. Requires in-house ability to perform quality checks on upgrades.

While many companies can provide eCommerce services, very few are able to deliver the value and rapid results the way that Epicor Commerce can.

### A Modular Approach to a Better Website

Whether you are selling to the general public, or to other businesses, Epicor Commerce has been designed to help you provide all visitors to your site(s) with the same high levels of user experience they have come to expect in today’s online environment.

Browsing tools such as configurable search, suggested items and automatically updated listings of popular products are able to help your customers very quickly get to the items they wish to purchase, while at the

same time showing them as much of your product range as possible—all in ways that are relevant and tailored to customer interests. You can also enhance the customer buying experience with convenient tools that allow them to:

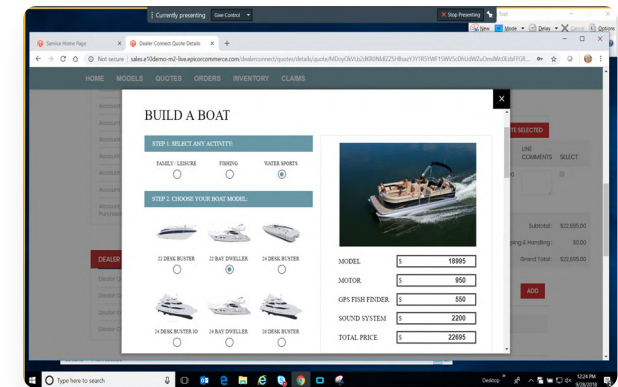
- View and compare different and related products
- Customize products
- View the product up close using the product image zoom-in capability

Tools such as these allow the customer to make better purchase decisions, which in turn lead to much higher levels of customer satisfaction and a lower rate of product returns.

### Dealer Portal

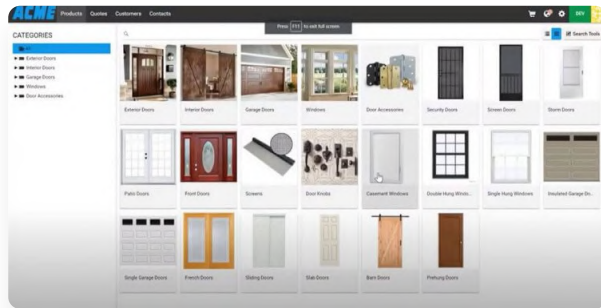
Dealer Portal is an innovative enterprise solution designed for manufacturers who sell or service products through dealers. Powered by Epicor Commerce and tightly integrated with your Kinetic platform, and now Epicor CPQ, Dealer Portal creates a modern online experience for your dealers to rapidly configure, price, and quote orders, as well as manage the service and warranty needs of your products. By capturing all dealer activity through a single easy-to-use portal, you establish a single thread of data that connects all transactions at the dealer with your back- end ERP.

You gain full visibility into the business, making it simpler for dealers— which in turns helps you drive business growth as a preferred innovative brand.



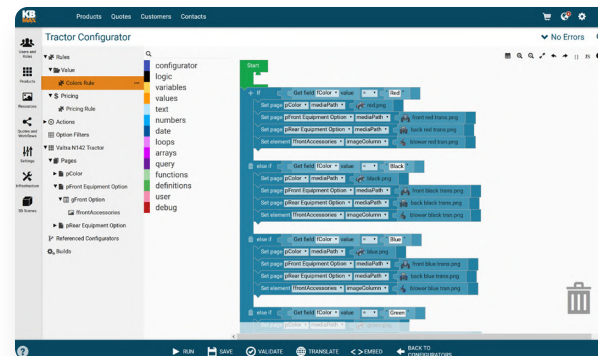
*Epicor Dealer Portal—Capture all dealer activity through a single, easy-to-use portal.*





With Epicor CPQ, manufacturers can help provide customers with a fully immersive buying experience and an endless variety of customization possibilities. At the same time, automated workflows reduce sales-to-manufacturing complexity on the back end.

Integrating with Epicor Commerce or directly with Kinetic—the backbone of your information system—lets you synchronize the complex relationships and data that determine supply, demand, and fulfillment. You can gather information from your mobile employees, eCommerce store, plant floor, and warehouse to get sales and manufacturing working together.



## Epicor CPQ Standout Features

### The Snap Rules Engine

Product and pricing rules—the logic that dictates how products can be configured, priced, and sold—are created using a low-code visual programming language called Snap. Rather than typing out long lines of code, users simply “snap” together interlocking blocks to form logic statements.

Having a centralized set of product and pricing rules gives your teams the confidence they need to configure products fast. Whether an experienced sales rep, a new hire, or an online customer is carrying out the configuring, outputs are guaranteed to be technically viable and optimized.

## Visual Product Configuration: Immerse Customers in the Buying Experience

Salespeople and online customers can configure products using a visual product configurator. They can drag and drop to change colors, dimensions, parts, and materials. Rather than imagining what their finished products might look like, they can see them on-screen before ordering, which boosts the conversion rate by an average of 40%.

Embedding a visual product configurator onto your website lets customers self-serve any time, any place, through any device.

## Generate Quotes Quickly and Accurately

Shorten the sales cycles and relieve pressure from engineering with the ability to build quotes quickly and easily, with a visual guided experience. Options chosen during configuration automatically make their way into the quote, along with auto-generated proposal drawings and other supporting documents.

## Give Real-Time Pricing

Help provide pricing to users immediately, while configuring products in real-time. Our controlled ordering experience helps ensure anyone can produce an accurate quote, no matter the complexity of the

## Epicor CPQ (Configure, Price, Quote)

Epicor CPQ is the configure, price, quote solution that makes it easy for manufacturers to sell complex, configurable products. It covers all the bases both on and offline:

- Visual Product Configuration enables digital self-service and brings buying experiences to life
- Dynamic Pricing slashes sales cycles to seconds and eliminates manual calculation errors
- Quote Automation frees sales teams from the burden of Excel, letting them concentrate on active selling

But Epicor CPQ does more than just configure, price, quote. Its functionality extends way beyond sales to engineering and the shop floor. It is a one-stop solution for manufacturers of custom products with a diverse range of advanced features, from CAD automation to augmented reality.

product being sold. Update pricing based on any factor, including complex pricing scenarios, discount, and approval workflows, while leveraging data from external sources like your databases, pricing tables, or ERP.

### **Automate Proposal Drawings and CAD files**

Allow Sales to sell, and Engineering to focus on design. Your product configurator can auto-generate proposal drawings for Sales, while also providing CAD file outputs for Engineering, relieving pressure for both teams. We work with the most popular CAD platforms, like SolidWorks, Autodesk, and PTC.

### **Auto-Generate Manufacturing Documents**

Our workflows can generate and send manufacturing documents like BOMs, cut sheets, inventory status, shipping, assembly, and other key outputs for your manufacturing process.

Since all outputs are autogenerated directly from product configuration output, you can be assured your shop floor has just what it needs to meet the exacting demands of your customers and distributors.

### **Integrate Buying with Core Processes and Systems**

Connect your configure, pricing, and quoting to your entire organization. Epicor CPQ Connector and MuleSoft integrations allow you to easily push and pull data from your Kinetic solution or Epicor Commerce, eCommerce, CRM/CPQ platforms, CAD systems, your PLM, or other apps, databases, and proprietary systems.

### **Gather Insights That Help All of Your Teams**

Collect key user experience data and push it to your preferred analytics platform, to answer your burning questions about your buyers and their engagement. Find out how your products are being configured to optimize your sales and manufacturing processes.







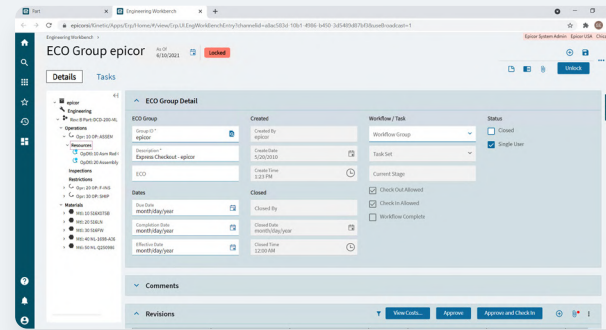
## ○ Product Management

Epicor Product Management serves as the central hub for your process and product data and history. It helps provide collaboration and data exchange among enterprise users who interact with your products— including product managers, engineers, salespeople, buyers, and quality assurance representatives. Product Lifecycle Management (PLM) from PRO.FILE by Revalize helps provide a comprehensive end-to-end solution to manage all aspects of a product's lifecycle, enabling enterprises to control the enormous number of electronic documents produced.

With Epicor Product Management, you can optimize the product lifecycle processes to increase the efficiency of your staff , create better quality products, launch new products in less time at a lower cost, and help maximize profits.

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





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

## Methods of Manufacturing

Manage product bill of materials (BOM) and routings in one central location. The part-specific method of manufacturing is controlled through engineering and offers drill-down functionality to lower level subcomponents—along with material and routing components required for each. Streamline engineering by modifying existing methods for same-as-except quotations and production runs. Enable engineers to begin with an existing method of manufacture from the methods master, a quote, or a job, and then easily modify it for the project at hand.

## Bill of Materials (BOM)

Epicor supports traditional BOM management with single-level part formats that recognize the materials and components required to build end parts. In addition, Epicor supports multilevel BOM management

that incorporates not only single-level components and material requirements, but also internal and external routing steps for complete end-to-end assembly visibility, planning, scheduling, and costing.

Epicor supports visual engineering technology with indented tree structures and drag-and-drop BOM management. Easily come up with new BOMs with functionality that enables the user to pull an existing method of manufacturing for a product and make modifications for future runs or similar products. Use alternate BOMs to predefine multiple BOM structures for the same part with material or component substitutions. In a multi-plant environment, BOMs at the plant level facilitate choices of where to build the part using plant-appropriate methods. Optionally have several BOMs within a plant, allowing the planner to choose the most cost-effective build. Gain the ability to store multiple reference designators on BOMs. You can also obtain explosion reports by component and by reference designator from quotes, jobs, and the engineering workbench.

## Routings

Detailed routings facilitate planning, scheduling, and costing of products more efficiently. Everything needed to produce a product is managed in one central location. Managing changes to routings is simplified. Changes are automatically communicated to the plant floor execution system and operators have online visibility of the latest routing production notes, as well as standards and resource requirements. Easily understand, navigate, and revise even the most complex, multilevel routing in the tree structure of the



engineering workbench. Free up engineers to focus on constructing the most cost-effective build. Quickly build new routings and easily modify existing routings using the Epicor drag-and-drop engineering tools. Alternate routings allow the definition and maintenance of multiple routings or material substitutions under a single part number. In a multi-plant environment, alternate routings at the plant level facilitate choosing where to build the part using plant appropriate methods. Manage and measure jobs with flexible production standards using traditional time-based production standards—including pieces per hour, hours per piece, pieces per minute, minutes per piece, operations per hour, fixed hours, and operations per minute. You also have the ability to allow planning by volume and quantity using dimensional planning that is not time constrained.

## 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, and engineering workflow management, offering detailed cost analysis of products during the engineering process.

The engineering workbench gives engineers an area to manage all engineering tasks related to the modification, review, and approval of assemblies—including full revision updating and control, check-out procedures, security, engineering change orders, BOM maintenance, what-if BOM maintenance, what-if cost rollups, adding parts, placing parts on hold, and product routing maintenance.

The engineering workbench also enables engineers to drill into all related information, like jobs, inventories, sales orders, and quotes.

## Document Management

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



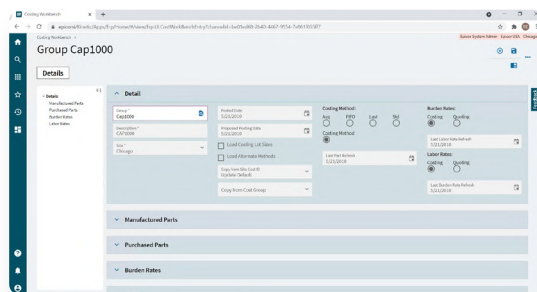


Epicor ECM offers a secure repository for documents. This solution also offers document versioning, check-out and check-in support. Other repositories are available including the PRO.FILE PLM vault, and other cloud repositories such as Google Drive™ and Dropbox.

Epicor ECM is also compatible with Government Cloud.

## CAD Integration

For companies who do not require the full product lifecycle management solution, CADLink by QBuild Software for Epicor increases the speed of engineering data flowing from the engineer's desktop to the rest of the business—in particular procurement and manufacturing. The CADLink for Epicor solution is designed to streamline the entire product development process, letting engineers push forward BOM revisions to Kinetic with a click of a button without leaving their familiar CAD environment. CADLink for Epicor eliminates all the burdens of disparate systems, allowing engineers to focus more on what they do best—engineering.



*Product Costing—Maintain and view costing by part type and cost type and access this information throughout the system.*

## Product Lifecycle Management (PLM) from PRO.FILE by Revalize

PRO.FILE is the PLM/PDM platform for the digitalization of all product engineering and product management processes and all document-based workflows in technical industries. Take your product engineering and product management to next level. Seamlessly manage your mechanics, electrical, electronics, and software disciplines on a single, unified platform.

Build a digital information twin to manage all of your product-related information—from inception to ongoing service delivery.

This will enable you to engage in true enterprise-wide digital engineering and product management along the entire lifecycle. PRO.FILE manages all documentation associated with a product throughout its product lifecycle and includes full integration with numerous computer-aided design (CAD) systems and various electronic design automation (EDA) systems.

It is particularly useful for companies that design what they manufacture, want standardized methodologies around workflow, use CAD or EDA systems, or use drawings to help produce a quote or an order. PRO.FILE builds a seamless experience that enables users from all business units to access the same data backbone for all of their different needs. This provides them with insight into the relationships between your product data, accompanying documents, and emails, which in turn results in transparent processes, satisfied customers, and compliance confidence.

PRO.FILE is integrated with Kinetic, eliminating the need for manual BOM data input and comparison. Also, you can access your purchased parts. PRO.FILE serves as a bi-directional gateway between CAD systems and Kinetic, giving you confidence that all your data is exchanged in a reliable way at all times.





## Product Costing

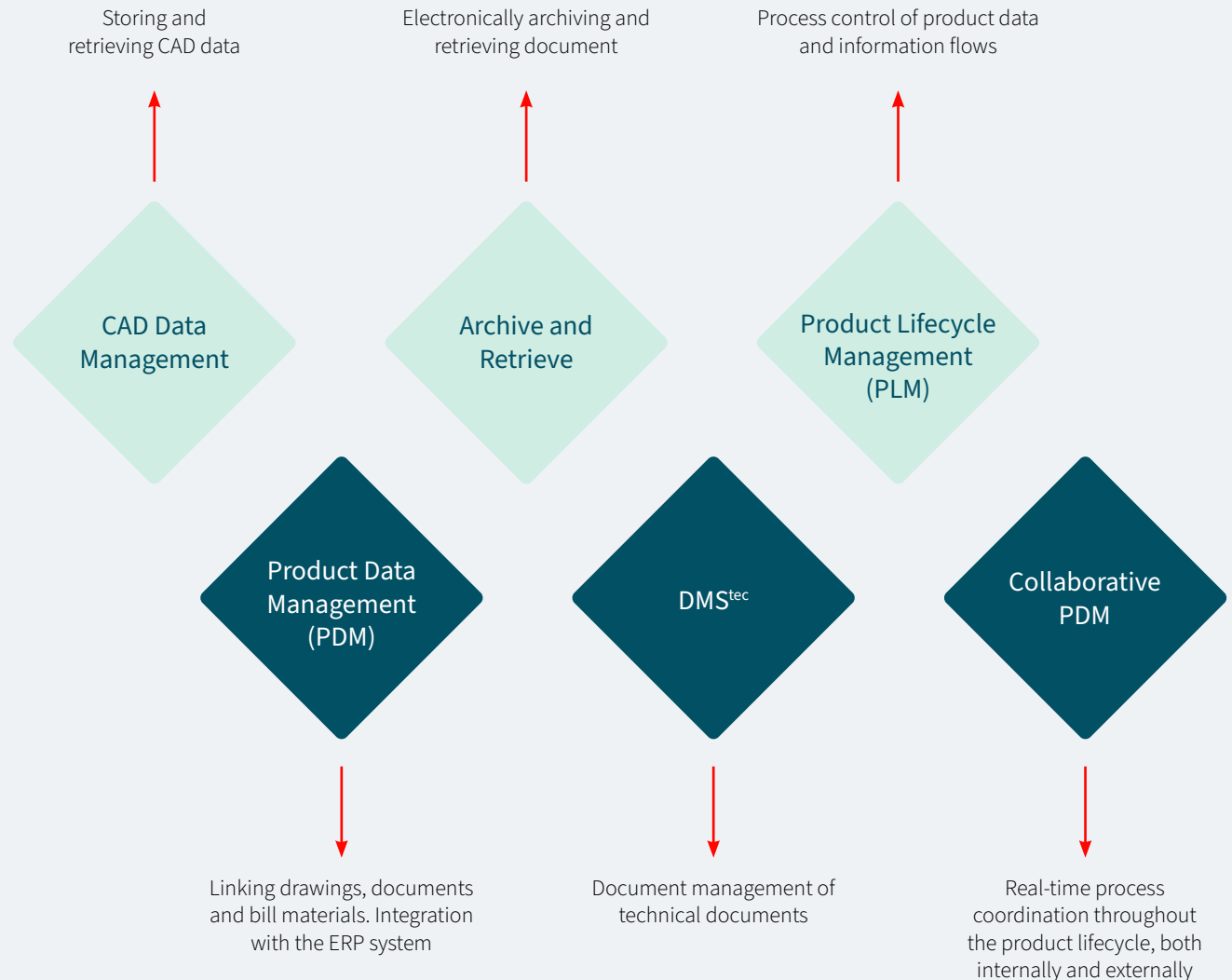
As a manufacturer or distributor, you consistently monitor product cost and analyze profitability as a way to pass cost savings on to customers while staying competitive. Epicor offers the flexibility and accuracy needed to analyze product cost on a customer-by-customer, part-by-part, and job-by-job basis. Maintain elements of product cost in separate buckets—including material, labor, burden, subcontracting, and material burden cost. Costing methods include average, lot, last, first in/first out, and standard. The costing workbench supports the management of part costs in a single location. Specialized tools pull in the most recent costs and automatically perform cost rollups. Designed with full audit capabilities, the workbench offers variance analysis prior to posting new cost tables along with the effective dates of the costing changes.

The costing workbench offers easy manipulation of resource, resource group, and operation cost.

## Product Configuration

Product Configurator enables on-the-fly configuration of highly customizable and dimensional products via a straightforward question and answer evaluation. It is web enabled and you can deploy them to the Web for use with your Kinetic application, including Epicor Commerce or the Dealer Portal.

Integrated with ERP, configurations are easily priced and once sold, manufacturing details flow to procurement and production, helping ensure accurate and timely manufacturing of highly-configurable products.



*PLM—Design to retire, PRO.FILE supplies mechanical and electrical CAD elements and is integrated to ERP to automate the flow of design information to the plant floor.*



## ○ Project Management

To be successful in a project environment, project management must permeate every aspect of your business solution. Companies that are able to efficiently meet the demands of managing their portfolio of projects have a distinct advantage over their competition—they have a better understanding of their costs, so they can bid and win business with confidence.

Project Management is a comprehensive solution for companies that plan and execute either simple or complex projects that may require intricate, multilevel phases, as well as strict costing or complex billing methods. Embedded within the robust Epicor capabilities, Project Management uses detailed

estimation, planning, scheduling, costing, and supply chain logistics for complete control and analysis of any project.

Resource Management helps provide a detailed representation of resource capabilities and availability. Time and Expense Management and Approval help ensure projects reflect accurate costs, and the comprehensive Billing and Revenue Recognition functionality helps guarantee compliance with contract requirements and accounting standards. At all times and throughout the entire process, embedded Project Analysis and reporting—combined with BPM—helps provide accurate and up-to-date status information and meaningful alerts.

- Project Planning and Analysis
- Project Generation
- Project Billing
- Resource Management
- Contract Management
- Planning Contract
- Time Management
- Expense Management
- Epicor APM







The screenshot shows a software interface for 'Project CP1000 - WBS Phase 1 - WBS Phase Costs'. It features a sidebar with navigation options like 'Project', 'Contract', 'Details', and 'Contract'. The main area displays a table with columns for 'Table', 'Quantity', 'Estimated', 'Actual', 'Manual Costs to Complete', 'Calculated Costs to Complete', 'Proposed Total', and 'Budget'. The table lists various project components such as 'Labor Hours', 'Material Hours', and 'Equipment Hours' across different phases and categories.

*Project Planning and Analysis—Effectively manage the project work breakdown structure no matter how complex. Ease the burden on project managers by providing access to everything relating to the project in a single place.*

## Project Planning and Analysis

Supporting the needs of industries with a project orientation, Project Management provides flexible Work Breakdown Structure (WBS) capabilities—including multilevel phases within a project. Fully embedded within Kinetic, Epicor Project Management offers the robust scheduling engine for complete visibility and management of the project schedule. The Epicor Project Management module also includes the ability to accumulate and roll up costs for a WBS Phase to the main project—supporting budgets, estimated completion values, and calculated, estimated, and actual costs accumulated at the WBS Phase or project level. For complete visibility, all costs are rolled up through the project structure, with added analysis capabilities offering cross-project scrutiny of material class, burden, or labor type.

## Project Generation

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

Define the work breakdown structure for the project. Automatically create jobs for the collection of costs and management of operations, and define the hierarchy for phase cost accumulation. Define multiple operations, their sequence, resource roles, and planned hours as required against each phase job. Optionally define workflow and approvals overrides at the phase level. Build a library of template project WBS structures to represent the various methodologies or requirements of recurring projects. Project structure and contract details can be manipulated in duplicated projects to reflect any nuances of a particular engagement. Bidirectional integration with Microsoft® Project® gives project managers an additional tool to use to easily manipulate the schedule and simplify the planning of any project.

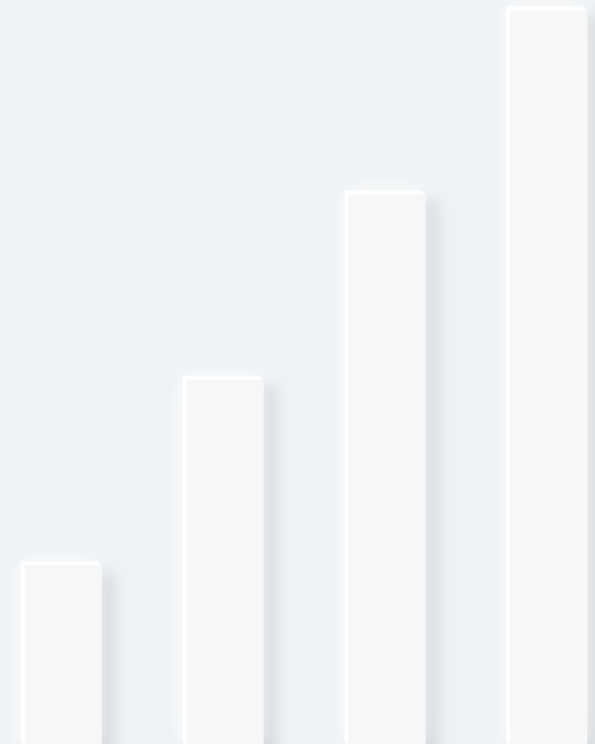
## Collaborative Project Management

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

Collaborate provides access to those involved with your projects to subscribe, follow, and trend what matters most to the team. Rather than relying on the

team alone, why not leverage the full expertise of an organization. Using MS Teams integration, project teams become collaborative entities—with unique connections and embedded in multiple networks both internal and external to the organization.

Collaborate allows the project team to tap into social networks for expertise and improved access to knowledge that can help complete their goals. It allows a project manager to see the social network of their team and leverage those connections to better collaborate with the greater project community.



## Contract Management

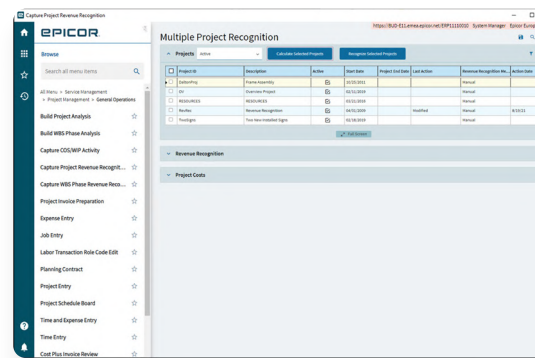
Maintain the contractual arrangements for a particular project with Contract Management. Record details of the customer together with key contract dates, values, currency definitions, project manager, and the appropriate revenue recognition method. Define source of costs rates to be applied to the project contract—hierarchical, project, employee, or role. Configuration settings can be used to help ensure that only resources with the specific role codes defined in the project contract are able to work and record time against a project.

This can be extended to record the specific resources that are approved to work on a particular project contract. Invoice ceilings can be established to limit the amount billed for a particular role code, resource, or supplier. The contract defines the system behavior when such ceilings are met—either to continue or cease invoicing for the defined resource. A BPM can be used to monitor as ceilings are approached. To cater to the needs of certain industries—notably contracts dealing with the U.S. Department of Defense—Burden Sets and the sequence in which they are applied may be maintained and defined against the project contract.

## Planning Contract

You can associate a planning contract with one or more projects. New sales orders, purchase orders, or jobs linked to a project will inherit the Contract ID. This supports the ability to link demand and supply to the project. The demand linked to a planning contract is filled by the supplies linked to the same planning contract.

As a result, the demand is fulfilled specifically from assigned Contract warehouse/ bin locations, excluding other non-planning contract warehouses/bins from the fulfillment process. You can link demand to a project, job, or sales order indicating where the demand will be consumed.

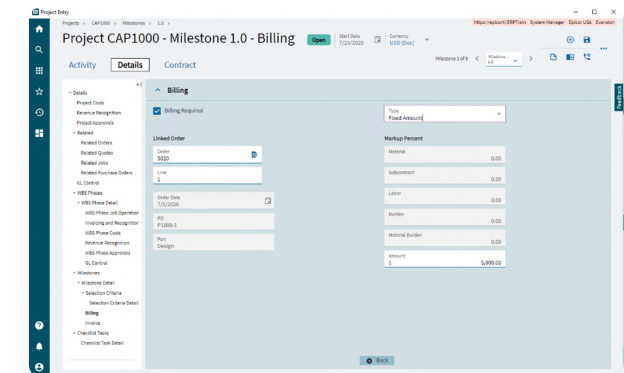


*From the Multiple Project Recognition Dashboard, you can monitor all your projects simultaneously. You can also run the Project Analysis, or the Revenue Recognition programs for multiple projects at the same time.*

## Revenue Recognition and Analysis

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. Easily perform revenue analysis for progress or milestone billing.

Kinetic allows you to process the revenue recognition for multiple projects at the same time, saving time for project managers and finance experts working on multiple projects. It improves efficiency and also helps eliminate tedious manual work.



*Project Billing—Comprehensive contract management helps provide a range of invoicing options for any billing situation.*

## Project Billing

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



The advanced invoicing methods available in Project Billing help provide the capability required to handle the commercial terms negotiated during the project bid process. This flexibility enables project managers to focus on managing project delivery in the most efficient way, while also handling accurate billing in accordance with a customer-defined schedule—including comprehensive contract management, multiple invoicing methods, time and materials billing, milestone billing, and more.

## Resource Management

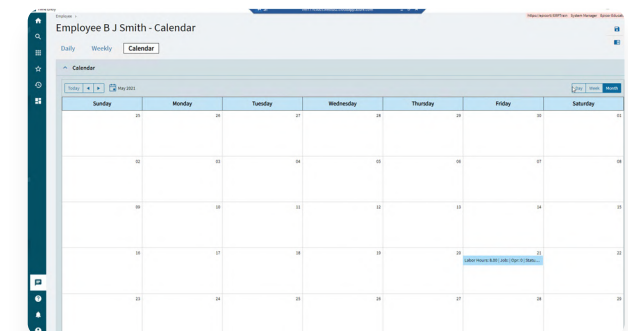
Resource Management helps provide the ability to define all resources available—whether they are employees, contractors, equipment, or machinery. Comprehensive calendars, resource capabilities, roles, and capacities can be defined, which are then referenced throughout Kinetic. Resource Management also helps provide the comprehensive costing and default burden and billing data used throughout the

application—from planning and scheduling to labor bookings. Contractual role requirements and a clear separation of direct and indirect labor are supported in accordance with the specifications of the most demanding contract requirements.

## Time Management

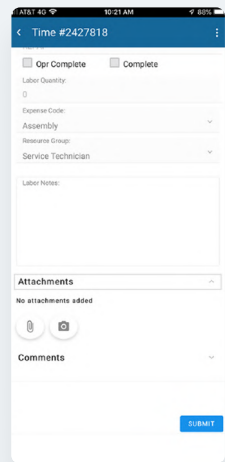
Time Management in Kinetic helps provide a highly configurable environment for the recording and management of time across projects, jobs, service orders, and internal codes. A range of entry options are available, each reflecting the nature of a particular transaction. Time can be entered via web browser when employees are on the go, on the shop floor, or in the office—resulting in quick and accurate recording. Time recording reliability is reinforced through an array of task-centric entry options, which focus on the critical data required in each context. Additional configuration options help ensure that users only have access to authorized jobs and booking codes, with

a clear separation between direct and indirect labor entry. Additionally, the flexible approvals process helps provide the security to help ensure that transactions are properly authorized and backed up by a comprehensive audit trail.

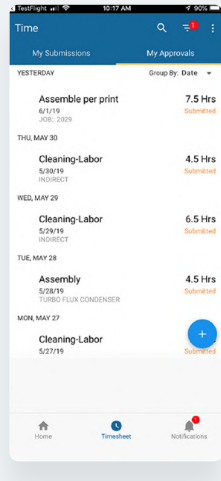


*Time Management—The calendar helps provide clear visibility of missing time sheet entries. The colored blocks indicate the approval status of each time transaction.*

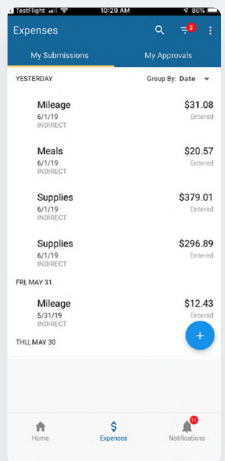




Go paperless by uploading photos and other attachments to the entries.



Take control of your expenses on the go.



Approvers can see and act on all submitted requests.

Track time and expenses anytime from your mobile device.

## Expense Management

Expense Management in Kinetic helps eliminate administrative effort and increase efficiency by providing a secure environment for recording and managing multicurrency expenses across projects, jobs, and service orders, as well as purely internal expenses. The flexible approval process of Expense Management also helps provide the security to help ensure expenses are properly authorized and backed up by a comprehensive audit trail, with approved transactions flowing directly into Accounts Payable for fast, efficient processing and reimbursement. Expenses can be entered on mobile devices via web browser when employees are on the go.

## Time and Expense Management Mobile Applications

Time and money are two key aspects that impact your business profitability. You need to help ensure you make proper payments to your employees or subcontractors and send accurate billing to your customers. Manual time and expense reporting processes can be time consuming and may often result in inaccurate data.

The Time and Expense mobile applications are available for both iOS and Android devices. Simply download them from your app store, and with minimal setup, you will be up and running in no time. With Time and Expense Management Mobile Applications, you get full control and visibility to make better decisions. Sync back the data in real time to Kinetic, as the applications are an extension of the system. Data flows seamlessly between the different modules like Epicor Financials into the mobile applications. They don't need a

separate license, as they are accessed through the Time and Expense Management licenses. Provide your project managers and their teams, sales personnel, field service technicians, and frequent travelers with modern and intuitive applications to enter, track, and approve time and expenses anytime from their mobile device.

Generate, view and edit expenses or time records when you're offline. These records are saved as drafts in the offline storage; once your Internet connection is restored, the apps automatically synchronize and submit the changes to Kinetic. The built-in dynamic dimensions functionality in the General Ledger Chart of Accounts setup links all approved and posted time and expense transactions to codes such as projects, cost centers, sales territories, salespersons, customers, product lines, and more.

## Management (APM)

APM extends the functionality and flexibility of the Project Management module. It helps address the challenges of contract management and multifaceted projects with an integrated solution that helps provide complete functionality to manage projects, contracts, claims, subcontractors, variations, and revenue recognition. Generate efficiencies in your business, improve cash flow and help with forecasting through effective management, and eliminate manual entries from your revenue recognition process to keep mistakes to a minimum.

The APM Suite has three modules that can be used individually or together, depending on your business' needs:







## ○ Planning and Scheduling

Performance-driven companies have mastered the art of predicting and responding quickly to changes in customer demand with minimal business interruption. Whether you are a global, multisite enterprise or a single-site manufacturer or distributor, precise and flexible planning and scheduling is imperative for efficient and profitable operation. Epicor offers a comprehensive solution for helping with forecasting, material requirements planning (MRP), scheduling, and advanced planning and scheduling to meet the needs of today's agile businesses.

- Helping With Forecasting
- Master Production Scheduling
- Epicor Smart Demand Planner
- Material Requirements Planning (MRP)
- Scheduling and Resource Management
- Epicor Advanced Planning and Scheduling (APS)
- Infinite, Finite, and Constraint-Based Scheduling





## Forecasting and Master Production Scheduling

Helping with Forecasting and Master Production Scheduling (MPS) in Kinetic are included with the Epicor MRP module and are designed to assist manufacturers and distributors with both day-to-day control and longrange planning and decision making. Forecasting and MPS support businesses that operate multiple, mixed mode strategies simultaneously.

Forecasting and Master Production Scheduling functionality includes:

### Forecasting

Forecasts can be generated from multiple historical sources (e.g., sales, invoice, and inventory usage history). Users can also manually enter forecasts for companies, plants, customers, dates, and parts, cut-and-paste from other applications into the forecast system, or generate forecasts from multiple historical sources (e.g., sales, invoice, and inventory usage history).

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

### Forecast Buckets

Bucket forecasts for variable periods: daily, weekly, monthly, yearly, etc.

### Forecast Analysis

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

### Inter-Company Trading

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

### 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. Manually enter or cut-and-paste MPS from other applications or automatically generate the MPS from the forecast.

### Driving Capacity and Raw Material Procurement

Make and alter MPS decisions based on constraints. Both forecasting and MPS can independently drive future demand.

### Planning Bill of Materials

Planning Bill of Materials is an unbuildable BOM that allows the user to express the lower-level parts as a percentage of the total number to be sold. This is the traditional way for manufacturers to forecast lower level parts .

## Smart Demand Planner

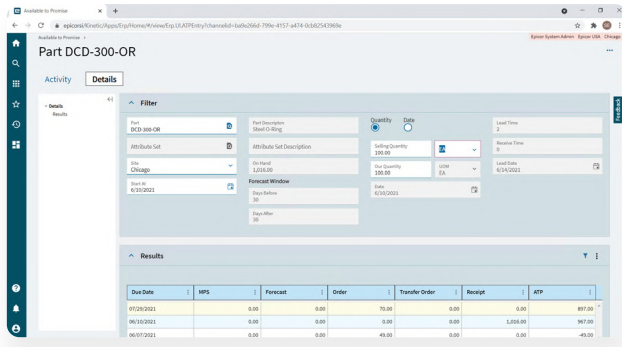
Smart Demand Planner helps provide cloud-based statistical forecasting that automatically selects the right forecast model for each item—accounting for trend, seasonality, and promotion/event-driven demand. For companies that manage many items like component parts, service parts, material requirements planning, or high-tech equipment, it includes an intermittent demand model so you can accurately forecast the inventory needed to hit desired service levels. Once the baseline forecast is produced, it is available for collaborative review and consensus planning by authorized stakeholders. In addition, forecast accuracy can be measured to help ensure the best possible forecast is delivered to the business at both the aggregate and item-mix levels.

Smart Demand Planner seamlessly integrates with Kinetic software using an “out of the box” connector that simplifies implementation and support.

**Note:** Learn more about related Smart products in the [“Supply Chain Management”](#) chapter.

## Material Requirements Planning (MRP)

Built for the needs of a single site as well as for the extended enterprise, MRP offers cross-plant and cross-company planning. Enhanced to off er plant source as well as product group sourcing of materials and assemblies, Epicor MRP automatically and visually extends the enterprise to efficiently manage supply and demand, from forecasting and MPS to MRP generation, and more. Epicor MRP functionality includes:



| Due Date   | MRP  | Forecast | Order | Transfer Order | Receipt | ATP    |
|------------|------|----------|-------|----------------|---------|--------|
| 01/01/2021 | 0.00 | 0.00     | 0.00  | 0.00           | 0.00    | 997.00 |
| 06/01/2021 | 0.00 | 0.00     | 0.00  | 0.00           | 0.00    | 997.00 |
| 06/01/2021 | 0.00 | 0.00     | 40.00 | 0.00           | 0.00    | 40.00  |

*MRP—Check supply and demand of a part with Available-to-Promise functionality*

## Planning Contracts

There are instances where parts need to be manufactured or purchased to satisfy a future requirement for a product or job that has yet to be fully developed from an engineering standpoint, or there are long lead items that need to be purchased or built before the upper level orders are ready to be released. The Planning Contract gives you the ability to manage long lead-time items before a trigger appears for demand. Best of all, it allows you to earmark these items for specific needs even if a Job or Sales Order has not been generated yet. The planning contract concept is used specifically in a situation where the supply generated to fulfill a contract is consumed by the actual demand linked to the same part in the same planning contract. Supply for contract materials is kept distinct from other general supply.

The Multi-Level Pegging Process pegs demand and supply, if they are linked to the same planning contract, allowing you to link Planning Contracts to demand and supply. The demand you link to a planning contract is filled by the supply you link to the same planning contract. As a result, the demand is fulfilled specifically from the assigned contract warehouse/bin locations, and excludes other non-planning contract warehouses/bins from the fulfillment process. You can link a planning contract to a job, project, purchase order, sales order, transfer order, or quote.

## 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.

## 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, Epicor MRP automatically adjusts corresponding jobs so you are in balance. MRP even reschedules by your plant or part for you.

## Material Planning

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



**Part Planning Tools**

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

**Plan as Assembly**

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

**Planning by Revision (PBR)**

PBR allows Epicor MRP to consider revisions in future planning and demand. It gives users visibility of inventory down to the revision level, allowing the ability to realize quantities for each revision of an item.

**Planning Horizon**

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

**Auto Job Firm Process**

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

**Multisite**

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

**Multilevel Pegging**

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

**Sourcing By Site**

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

**Available-to-Promise**

View running balances with the available-to-promise function. Enter a quantity, and the system will find the earliest date that quantity will be available.

Enter a date, and see how many parts are available on that day. MPS, forecast, order, and planned receipt quantities are visible to help you in your production planning tasks.

**Planning Types**

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

**Rough Cut Horizon**

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



### Recycle Jobs

Epicor MRP reuses un-firm jobs for optimum MRP performance.

### Short Horizon Days of Supply

To optimize Epicor 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 Epicor MRP determines that the needed materials fall within the Short Horizon.

### Calculate Manufacturing Lead Time

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

### Start Minimum Quantity

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

### Bill of Materials Check

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

## Scheduling and Resource Management

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

before they are firmly committed. Scheduling and Resource Management functionality includes:

### Production Scheduling Board

Easily manipulate the schedule with drag-and-drop and drill-down techniques for multilevel assemblies and operation details. A main control center for scheduling resources graphically displays schedules by job, resource, resource group, or entire plant.

Dynamically change the timeline of the view to see short-run operations and quickly analyze the impact of long running operations.

### Alerts

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

### Finite Scheduling

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

Features include job locking for key operations or jobs, user-defined priority, and capacity load leveling by resource and resource group.

### Drag-and-Drop

Drag-and-drop scheduled load hours forward or backward to effectively alleviate fall overload conditions at critical resources or resource groups.

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

### Overload Informer

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

### Multilevel Assemblies

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

### Schedule Multi-Job

The Scheduling Multi-Job option allows you to schedule a group of associated jobs as if it were a single job. Jobs are associated via make-to-job relationships. This makes it possible to schedule and rearrange manufacturing jobs for a parent assembly and its child

subassemblies (called predecessor and successor jobs) all at the same time. This allows the scheduling planner to easily manage linked jobs to help ensure they are scheduled together, meeting customer requirements.

### **What-If and Change Impact**

Schedule jobs in a what-if mode, with the ability to analyze potential bottlenecks before finalizing the actual schedule. View the potential changes for cost and throughput to the schedule after creating what-if scenarios.

### **Setup Grouping**

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

### **Capabilities With Zero Priority**

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

### **Dual Resource Constraints**

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

**Note:** The Epicor APS module helps provide the ability to use more than two resource constraints.

### **Conditional Forward Schedule**

If you're performing a backward schedule and encounter a current date, you have the option to allow the system to perform a forward schedule based on a start date of today.

### **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, as well as values for hourly/daily capacity, queue- and move-time.

### **Finite Load Horizon**

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

### **Resource-Based Schedule**

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

### **Reschedule Delta**

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

### **Rough Cut Scheduling**

Keep an eye on the future with Rough Cut Scheduling, which shows future production without taxing system resources.

### **Scheduling Factor Send Ahead**

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

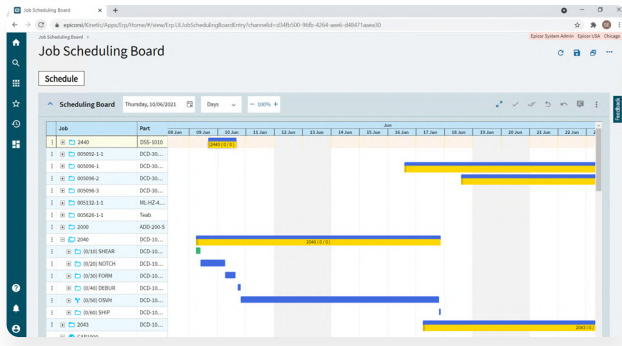
### **Scheduling Blocks**

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

### **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 contains 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.





*Scheduling and Resource Management—Manipulate the schedule directly from a sophisticated, drag-and-drop visual scheduling board.*

## Epicor Advanced Planning and Scheduling (APS)

Available as an extension to Scheduling, Epicor 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.

### Capable-to-Promise

Easily manage customer expectations with real-time capable-to-promise functionality in Order Management. Epicor capable-to-promise uses the scheduling engine to determine accurate promise dates and offers order processing single-click confirmation or order cancellation based on the projected due date.

### Multiple Resource Scheduling Board

Easily manipulate the schedule with drag- and-drop manipulation and drill-down techniques for multilevel assemblies and operation details. A main control center for scheduling resources graphically displays schedules for a group of resources in one screen.

Dynamically change the timeline of the view to see minute operations and quickly analyze the impact of long running operations. Add memos to a schedule on the Multi-Resource Scheduling Board about any aspect of a current schedule.

### Multiple Constraints

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

### Resource Eligibility

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

### Automated Scheduling by Capability

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

### Dependent Capabilities

Link dependent capabilities that the scheduling engine schedules along with the primary capability when

operations require dependent skills to perform the operation.

### Finite or Infinite Capacity

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

### Minimum WIP Scheduling

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

### Dimensional Planning

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

### Rate-Based Scheduling

Schedule cells based on production throughput rates rather than time.

### Material Constraints

Consider material availability as a scheduling constraint.

Integrated directly with Inventory and Purchasing, the Epicor APS system knows when material is due and schedules accordingly.

### Advanced Material Planning

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





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

### **Change Impact Analysis**

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

### **Time Adjustment**

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

### **Optimization Rules**

Generate a schedule based on rules assigned to individual resources.

### **Balanced Optimization**

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

### **Single Cell Scheduling**

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

### **Unlimited What-If**

Generate unlimited what-if scenarios to view the effect of changes on your shop floor.

### **Multi-Plant Communication**

Help to ensure that interdependent plant schedules are coordinated.

## **Multisite Management**

Not only are manufacturers and distributors looking for new tools to oversee multi-plant operations, they're also looking to maximize the use of existing resources. Alternative production methods management helps optimize the production processes for specific parts in each plant, based on the resources available.

Another optimization tool includes the transfer of material or semifinished components to another plant for completion.

**Note:** Learn more about Multisite Management in the [“Global Business Management”](#) chapter.



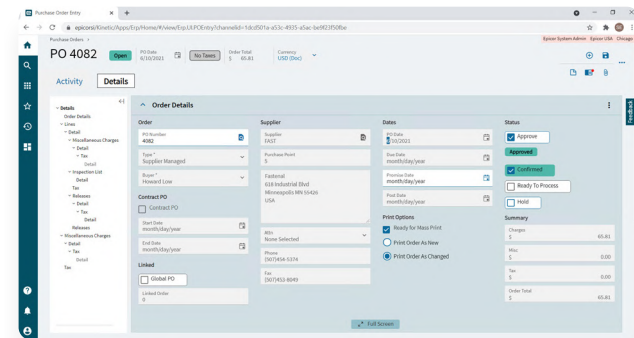
## ○ Supply Chain Management

A highly effective supply chain is critical to the success of your strategic growth initiatives. Top-performing manufacturers are empowering supply chain processes with innovative technology that is best-fit for unique operational needs, easy to use, and informed by industry best practices. Drive out costs, increase velocity, and enhance your customer experience with a strong supply chain that is ready for the future of manufacturing. Offering rich visibility and digital prowess, Epicor helps provide effective coordination from initial raw materials to the ultimate delivery of the finished product, transforming your supply chain into a results-driven value chain.

Epicor Supply Chain Management (SCM) is a full suite of enterprise application capabilities—including purchase management, sourcing and procurement, inventory management, advanced material management, shipping and receiving, and warehouse management— and is complemented by forecasting, order management, and analytics capabilities. Combined, you have the solution you need to meet— and even exceed—customer expectations in today's increasingly global market place.

- Purchase Management
- Epicor Advanced Requisition Management (ARM)
- Supplier Connect
- Supplier Relationship Management
- Inventory Management
- Advanced Materials Management
- Advanced Unit of Measure (UOM)
- Shipping and Receiving
- Epicor Quick Ship
- Warehouse Management
- Supplier EDI and B2B Integration





*Purchase Management—Enter, approve, and confirm purchase orders with multiple line items and releases.*

## Purchase Management

Purchase Management handles purchase order writing and the tracking of supplier performance to optimize results and improve negotiations. Multiple detailed line items indicate planned receipts to inventory or a job, direct receipts to a sales order, or direct receipts to a manufacturing 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 you with continual reference to aid in making purchasing decisions.

With Purchase Management, you can reduce inventory levels, improve on-time deliveries, enhance your cash flow, and help increase your profit levels.

Purchase Management capabilities include:

- Automated purchasing tools
- Supplier cross-referencing
- Supplier approval capability
- Mass purchase order receipt
- Multiple location receipts
- Part master price breaks
- Purchase requisition
- Purchase history
- Purchase order tracker
- Supplier tracker

## Epicor Purchase Contracts

Epicor Purchase Contracts is designed to automate the process of purchasing inventory items on a recurring basis—including the establishment of recurring delivery schedules. Contract line items can be assigned to purchase orders, which automates your delivery schedules with delivery dates, prices, and corresponding quantities. Automatic requirement calculations—based on generated PO suggestions—are factored into delivery schedules, which you can adjust automatically to conform to supplier requirements or help with inventory control, production efficiency, and business expediency. Complete functionality includes part schedule maintenance for establishing

the combination of part, plant, and calendar that makes up the part schedule, as well as periodicity code maintenance to establish the rules and terms under which orders periodically arrive from suppliers.

## Epicor Advanced Requisition Management (ARM)

High-performing supply chains maintain a budget and control over items requisitioned for each stocking location for greater efficiency. Epicor ARM enables organizations to gain visibility and regulate procurement spending by providing an online workflow and purchase requisition tool. It gains information on spending to support negotiation of bulk purchase discounts from suppliers, assigns preferred suppliers for particular products, sets the right spend limits for individuals, and assigns the chain of authority for approving purchase orders.

## Supplier Connect

Strengthen your competitiveness by offering customers and business partners the ability to interact with your brand online.

Supplier Connect is a supply-chain-focused feature of Epicor Commerce—a complete, connected, and customer-proven business solution for modern digital commerce and omnichannel enablement. By providing the means for customer and supplier self-service on a whole range of inquiries—such as open orders, part information, and access to old invoices—Epicor Commerce eliminates the need for inquiries to come in via email, phone, or fax, significantly reducing the amount of time staff need to spend answering them.



Supplier Connect is specifically tailored for suppliers to update their information via their own supplier portal, answer requests for information, and confirm changes to purchasing orders. It can deliver performance metrics and also allows user-defined fields to flexibly extend your data storage options and send custom messages between your online storefront and your centralized back office. This not only provides for a more seamless relationship between you and your suppliers, it also allows for your business to react much more quickly and accurately to any change of circumstances with supply.

## Supplier Relationship Management

Supplier Relationship Management (SRM) helps provide tools for buyers, procurement staff, and purchasing agents, to request quotes for raw materials or subcontract services from one or multiple suppliers. Request for quotes (RFQs) are generated with one or more lines, allowing you to evaluate the responses from suppliers to decide which businesses can provide your company with the quantities, price points, and delivery dates you need for your manufacturing and servicing business flow. Supplier RFQ responses automatically build or add to existing part price-break tables with current effectiveness dates to be used in other Epicor applications.

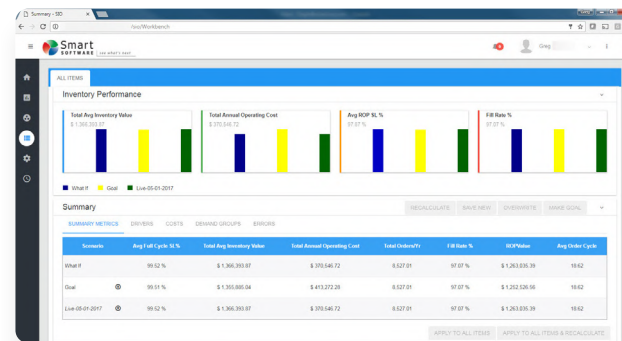
## Epicor Supplier Portal

Integrates your suppliers with your Kinetic solution quickly and seamlessly. It helps provide either an integration solution (for suppliers who can connect to you) or a web portal (for suppliers who can't) through which you and your suppliers can communicate in an easy-to-understand, human-readable format—not 'EDI

speak'. You can view documents and status information about sourcing requests and graphical charts that provide insights into EDI data.

These web-based analytics present supply chain activity and alert you to unexpected or non-compliant supplier actions. You'll have real-time visibility into orders, carriers, and warehouses so your team can respond to supply chain breaks immediately.

**Note:** Refer to the “[Cloud Business Architecture](#)” chapter for more information about the Epicor EDI solution for EDI and B2B integration.



Smart IP&O by Smart Software—Easily visualize your inventory performance reports and share with key stakeholders.

## Inventory Management

Epicor Inventory Management helps provide the key functions necessary to update and maintain raw materials, work in process (WIP), finished goods inventory quantities, costs, and on-hand requirements.

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

- Alternate parts maintenance
- Costing management
- Country of origin tracking
- Cycle counting
- Global trade standards
- Manufacturers part
- Part cross-referencing
- Part master price breaks
- Physical and perpetual inventory
- RoHS compliance
- Time-phased material inquiry/report
- Unit of measure definitions
- Track inventory by revision
- Lot and serial tracking

## Package Control

Package Control functionality allows you to track, manage, or transact a group of items via a unique identifier, the Package Control ID (PCID).

Track any item from receipt into a site, the movement of an item throughout the site, the shipment or transfer of that item to another site, and eventually the shipment of that item to the customer.

Also supporting the inbound generation of PCIDs, Kinetic allows you to reserve and allocate PCIDs for sales orders, issue material to jobs, produce PCIDs from jobs, transfer PCIDs from one site to another, and receive PCID finished goods in inventory to complete processing transactions. Perform pick and unpick transactions, shipping transactions, and job receipt to inventory transactions— among others—against a unique PCID. Shop floor users have the ability to report WIP at any operation or within the job into a PCID, and users can also report subassemblies into a PCID.

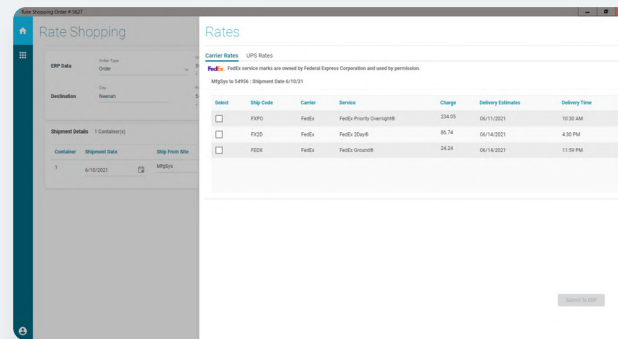
PCIDs have an associated set of predetermined or user-defined physical and controlling characteristics, which comprise the package itself (properties and contents) and the label. Each can have its own rules of control, process flow, and status to give you greater control and visibility into your supply chain.

## Epicor Shipping and Receiving

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

Complete functionality also includes:

- Mass ship
- Subcontract parts tracking
- Miscellaneous shipment tracking
- Miscellaneous receipts management
- Pack and ship/pack out processing
- Master pack tracking
- Phantom pack shipping
- Shipping performance reporting
- USB scale interface



*Epicor Quick Ship simplifies freighting and shipment to customer specifications.*

## Epicor Quick Ship

Today's customers have many different shipping options. Epicor Quick Ship, a multicarrier shipping software for Kinetic, streamlines domestic and international shipping processes to help you meet your customers' demands.

From rate shopping at order entry to manifesting your domestic or international shipments, Epicor Quick Ship

communicates with various carriers and helps provide the information about that shipment back to the ERP platform. As part of the shipping function, Epicor Quick Ship prints labels, bill of lading, and export documents to be included with your shipment.

Capabilities include:

- Support for multiple carriers/account numbers in one system
- Rate shopping
- Data mapping tool
- Bill of lading generation
- Automated blind shipping
- Automated email notification
- Automated hazmat paperwork
- Hazmat compliance software integration (DGIS)
- Best way and routing guide
- Consolidated shipments
- International shipments and documentation
- Print or email return labels
- Rate import tool for custom carriers
- Transfer orders
- Configurable handling fees

- Mass shipping
- EEI/ACE integration
- Navisphere integration for simplified carrier negotiation
- Language translations
- Currency conversion for freight charges
- Central storage of shipping documents
- ITAR and carrier compliance
- Automated drop shipments
- LTL and custom carriers

### Warehouse Management

Warehouse Management leverages Kinetic, mobile ID data collection, and wireless communications to seamlessly link your warehouse with your order processing and manufacturing operations—optimizing your pick, pack, ship, and receiving processes.

Functionality includes:

- Bin management
- Warehouse team creation
- Fulfillment workbench
- Allocation template
- Wave picking
- Cross-dock tracking
- Paperless picking
- Queue management

### Lot Tracking and Attributes

Help improve supply chain efficiency with full visibility of parts by lot throughout your system. Record material received, keep traceable material on-hand, and maintain detailed usage information by lot with the option to auto-generate lot numbers based on part-specific rules. Lot trace views offer a flow chart for lots.





Additional lot attributes can also be stored for each part lot, which include Batch, Manufacture Lot, Heat Number, Manufacture Date, Expiration Date, Firmware Version, Cure Date, Best Before Date, etc.

### **Serial Tracking**

Serial tracking helps to ensure product traceability, allowing for greater control over parts within the facility. Comprehensive functionality ranges from no serial tracking to full serial traceability of each recorded move of a part and its components. Optionally, you can record serial numbers at the outbound stage only. This is particularly useful for companies that must record what serial numbers have been shipped to which customers and when, but have no need to undertake the overhead costs of recording serial numbers as inventory moves around the warehouse or internal production facilities.

### **Serial Tracking for Revision and Attribute Tracked Parts**

Many inventory specialists need the ability to track serial numbered parts that are also revision tracked. This new feature brings the ability to set inventory-by-revision tracked and inventory-by-attribute tracked parts as serial tracked. This feature expands customers' usage of attribute-tracked parts. A customer can now serialize a part number that has specific attributes.

### **Customer-Managed Inventory**

Lower business risk by enhancing control over customer-managed inventory that you store but never own. These items can be used in the production of products for a customer or shipped by you directly to your customer's customer.

### **Supplier-Managed Inventory**

Epicor Supply Chain Management allows you to designate material purchased as inventory you are storing as consignment inventory from the supplier. You can also use these part quantities on jobs; once you consume the inventory, your company legally owns the items.

### **Smart Inventory Planning and Optimization**

Smart IP&O by Smart Software is a cloud-based reporting platform for demand planning, inventory optimization, and supply chain analytics that helps drive sales and inventory operations planning. The platform offers a convergence of robust forecasting methodologies, optimization techniques, and consensus demand and inventory planning, all delivered via an easy-to-use web interface accessible through any browser. For more details, check the Business Intelligence Section.

### **Advanced Unit of Measure (UOM)**

Selling items with many dimensional attributes can be complex and make it difficult to implement ERP. For these manufacturers and distributors, Epicor Advanced UOM reduces the complexity of implementation by reducing the amount of configuration needed to fit these unique needs. Advanced UOM takes a simplified approach to finding the right inventory by segmenting inventory with attributes such as hardness, strength, modulus of elasticity, or density. Because the inventory is segmented, it is easily located, physical counts are more meaningful, and the business can plan inventory needs at the attribute level, helping ensure accurate

supply and demand are met. Furthermore, Advanced UOM offers dynamic attributes to help businesses manage conversion between units of measure. For example, pounds or grams to feet, meters, or each. Both the theoretical size (4 meters length) and optional actual size (4.1 meters) can be converted to the accurate weight measures.

There is power and efficiency in purchasing and selling in one unit of measure while managing inventory and production in another. Epicor Advanced UOM produces these transactions in dual units of measure, giving greater visibility and accurate cost throughout with the simplicity of transacting in a number of pieces rather than counting out the weight or meters.

### **Advanced Materials Management**

Epicor Advanced Materials Management enables businesses to produce electronic requests for materials, dispatch those materials, and track inventory movements of all inventory—including raw materials and work in process. Using wireless terminals and bar coding technology, you are able to track inventory in real time with complete control and visibility of raw materials and work in process as it travels throughout the enterprise. Complete functionality includes:

- Bar coding on demand
- Material handler interface
- Material movement
- Order prioritization
- Sales order allocation
- Bar code tag scanning
- Handheld capability

## Automated Fulfillment

Automated fulfillment is the ability to develop fulfillment automation rules that are applied during the allocation process to automatically allocate sales orders. Customers can automate the fulfillment process, leading to less legwork for quicker fulfillment processes.

To greatly improve the ability of customers to expedite the shipping of a Sales Order, Job, or Transfer, they need the ability to automate the fulfillment process, reducing the time it takes to get the order (Sales Order, Job, or Transfer) to the floor for picking and shipping.

## Epicor Wireless Warehouse

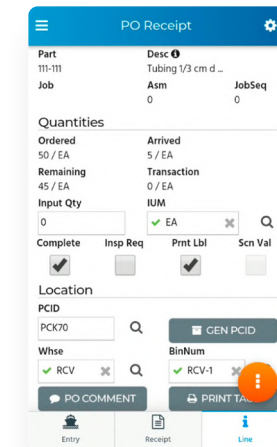
Epicor Wireless Warehouse is our handheld application which offers a modern, intuitive user interface for warehouse and distribution functions. The application optimizes workflow for fast and accurate scanning, improves time to process transactions, increases accuracy, and reduces errors. It is compatible with the latest scanning devices running on Android® 5 or higher from Honeywell® and Zebra®. Capabilities include:

- Receiving of inbound containers, purchase orders, intercompany and transfer order receipts.
- Core warehousing functions allowing users to initiate adjustments and movements from the warehouse floor, conduct cycle counts, and stock takes.
- Picking of items assigned to a material queue, grab items from the available queue, or return items back to the queue.

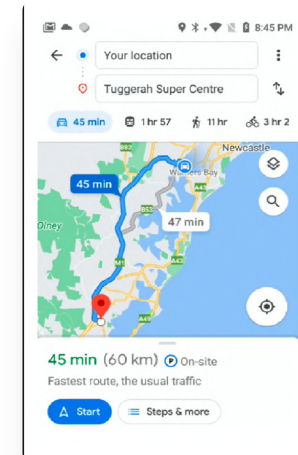
- Unpicking of sales or transfer orders
- Automated workflows triggered by scan events.
- Complex sort and filter options
- Part and bin level validation
- Configurable scan validation
- PCID management including builds, splits, and merging
- Processing of outbound shipments direct from the device.
- Paperless proof of delivery with sign-on glass signature and photo capture
- Delivery route optimization and navigation

## Epicor Proof of Delivery

For customers only requiring the paperless proof of delivery and delivery route navigation functions, an Epicor Proof of Delivery app is also available as a standalone subset of the Epicor Wireless Warehouse mobile app. In addition to Android devices, Epicor Proof of Delivery is also available for iOS devices and can be downloaded from both Google and Apple App stores.



*Epicor Wireless Warehouse application helps provide a modern and intuitive user experience on Android devices.*



*Productivity and Data Accuracy is increased for your delivery workforce with the Epicor Proof of Delivery mobile app.*



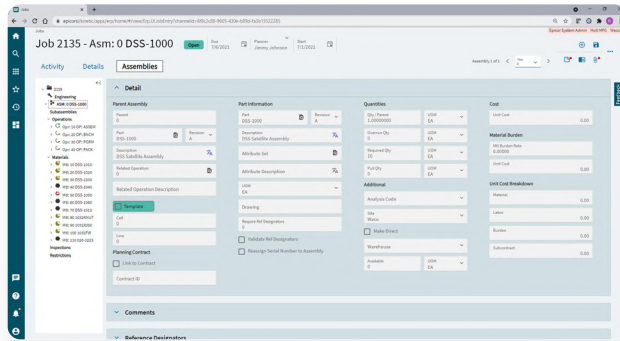
## ○ Production Management

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

- Job Management
- Advanced Production
- Kanban Lean Production
- Data Collection
- Epicor Advanced MES
- Quality Assurance
- Epicor Quality Management System (QMS)







*Job Management—Helps provide detailed information to the plant floor about every aspect of a job.*

## Job Management

The Job Management module, in the Operations Core Package, is a comprehensive production control solution designed specifically for the planning, routing, scheduling, costing, and tracking of goods—including assembled, manufactured, and semi-finished products.

It includes innovative tools for better planning and costing with historical run analysis that compares estimates to actuals on a run-by-run basis. Job Management functionality includes:

### Planning Workbench

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 needs. The planning workbench allows seamless access to the scheduling board for more detailed job management.

### Job Manager

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

### Production Planners Workbench

The Production Planners Workbench is a dashboard that helps provide an overview of the material shortages of the selected jobs.

Although this information is already available in each job, this overview gives the job planner a tool to quickly gather information for multiple jobs at once.

### Job Costing

Compare actuals to estimates online, review job costing for materials, material burden, subcontracting, operations (labor/burden), and compare projected and actual billings for profitability analysis.

Job costing can be performed on a job-by-job, customer, part product group, or overall company basis.

### Order-to-Job Linking

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

### New/Change Order Notifications

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

### Drag-and-Drop Interface

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

### Planned Overproduction of Assemblies

Produce and auto-receive overproduction quantities to inventory.

### Yield Scrap

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

### Assemblies

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

### Scheduling

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

### Backflush

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

### Job Tracker

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

**Productivity**

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

**Quality Control**

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

**Material Shortage Indicator**

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

**Advanced Production**

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

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

Advanced Production functionality includes:

**Support For Co-Product Production**

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

**Support for Nested Product Production**

Get simplified production of nested or products of the same material or process in the same production run. Integration to nesting software solutions is available with Epicor NestLink—a real-time, bi-directional, fully automated nesting job integration to Kinetic.

**Part and Operation Batching**

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

**Visibility of Production Batching**

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

**Accurate Cost Control**

Material and production costs can be applied accurately to multiple jobs as production is complete.

Simplified labor entry allows plant floor employees to enter quantities for multiple parts in a single step.

**Simplified Plant Floor Interface**

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

**Concurrent or Subsequent Flexibility**

The user can select to either link parts and operations subsequently (to be run one after another) or concurrently (at the same time).

## Single or Multiple Operations

The user can select either a single operation for linking or to link an entire job.

## Extend Co-Part Functionality for End Activity, Time Entry

For many production managers using the co-part functionality in the job application, the ability to address both the main part and the co-part as equals in all respects, including reporting of scrap and nonconformance, has been a desired capability for a few years. This use case is specific to co-parts being different part numbers.

This new feature gives managers the ability to report scrap and non-conformance against the co-part (secondary part), not just the primary part. For example, if something goes wrong with the tooling of the secondary part, customers can now scrap that part (i.e. part number) separately from the primary part.

## Kanban Lean Production

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

Lean Production functionality includes:

### Manufacturing Without Work Orders

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 demands require additional product, Kanbans—such as manufacturing real-time Kanbans, manufacturing flow Kanbans—purchase real-time Kanbans, and stock replenishment Kanbans, are automatically requested. The Kanban manages the stocking and order demand for parts flagged as needing Kanban control. User-defined rules enable parts to be flagged for Kanban control at the part, warehouse, or individual bin or cell location level.

### Cell-Based Inventory

Manage, plan, and replenish materials within a cell.

### Real-Time Manufacturing Kanban

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

### Manufacturing Flow Kanban

View future demand to dynamically calculate future replenishment Kanbans with the manufacturing flow Kanban. This gives downstream cells and suppliers visibility into 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. Realtime purchase Kanban automates the replenishment of material from vendors and helps provide for visibility of current supply requests.

### Automated Material Flow

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

### Measurement of Production Activity Against Lean Performance Metrics

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

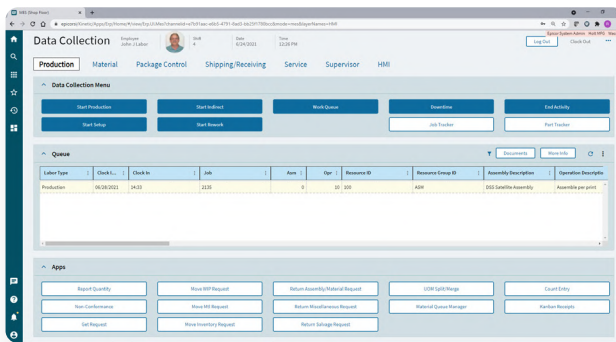


## Lean Metrics

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

## Support for Hybrid Approaches to Lean

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



*Data Collection simplifies collection of operator data and optimizes production with production queues*

## Data Collection

Data Collection (formerly known as Epicor MES) is an easy-to-use, online system for the plant floor that allows plant-based transactions real-time visibility throughout the Epicor solution.

Data Collection enables accurate labor reporting, as well as online transaction tracking, which helps provide management with a real-time picture of what is occurring on the plant floor by employee and job. It also allows users the flexibility to design their own forms to drive even further actions within Kinetic. Integration with Job Management, Scheduling, Quality Assurance, and Advanced Materials Management eliminates dual entry and helps provide online, real-time views of the latest plant floor scheduling priorities. In addition, an integration with the Epicor Document Attach Tool allows plant floor access to needed documentation, such as product drawings, process documents, and multimedia videos.

Complete module functionality includes:

## Flexible Data Entry Technology

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

## Work Queue

Provide employees with prioritized work schedules and make information directly available to the plant floor. Data Collection is optimized for use on the plant floor

with the ability to select multiple operations for work at the same time, full sheet views, views specific to current, available, or expected work, ability to target work based on TAKT, pieces, hours, and setup group designations, and advanced search capabilities.

## Multilingual Data Collection

Display the Data Collection screens in the employee's primary language.

## Distributed Hours

Automatically split labor hours across multiple jobs being worked on simultaneously by an employee.

Likewise, split resource or machine hours when two or more employees work on the same resource.

## Quality Reporting

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

## Shop Warnings

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

### Grace Periods/Multiple Shifts

Manage clock-in and clock-out periods with adjustments made for user-defined grace periods. Accommodate split and staggered shifts.

## Trackers in the Plant

Users can access online trackers on the plant floor from within Data Collection. Job Tracker, Order Tracker, Customer Tracker, Shipment Tracker, and more, available based on login and secure access. Shop Tracker shows who's here, who's not here, current work center activity, as well as user-defined alert conditions from the plant floor.

## Shipping and Receiving

In combination with the Advanced Materials Management module, maximize responsiveness in the warehouse with Shipping and Receiving functions from within the Data Collection module.

## Inventory Management

In combination with the Advanced Materials Management module, maximize responsiveness in the warehouse with Inventory functions such as adjustment, material issues, and physical inventory counts from within the Data Collection module.

## Material Handling

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



*Epicor Advanced MES—Automatically collect and report the status of Jobs on the plant floor in real time.*

## Epicor Advanced MES

Staying competitive isn't easy in today's evolving manufacturing space. How do you increase efficiency and reduce costs while still complying with your customers' requirements? That's where Epicor Advanced MES comes in. Epicor Advanced MES utilizes Industry 4.0 technology on the shop floor—such as cyber physical systems and Internet of Things (IoT) sensors—to help you gain the competitive advantage you need, both now and in the future. Kinetic manufacturers use Epicor Advanced MES to improve quality, reduce scrap, help ensure on-time performance, and boost production throughput.

It's all about improving production execution and performance efficiency to help you gain a competitive advantage. Epicor Advanced MES collects data directly from equipment on the shop floor in real

time, minimizing inaccurate and time-consuming manual data collection. With information instantly in your hands, you can anticipate and solve production problems before they happen. Real-time insight helps you pinpoint critical issues, reduce waste, and improve quality and customer service.



Epicor Advanced MES functionality includes:

### **Deploy Your Way**

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

### **Usability**

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

### **Monitoring, Data, and Communication**

The shop floor is a real-time environment—your MES should be too. Epicor Advanced MES has real-time automated alerts, notifications, escalation, and other communications, so the people who need to know are in the know when it matters the most—immediately, so they can take action to correct a problem, or improve performance on the spot. Automated alerts include machine conditions, cycle, process variations, efficiency, and scrap.

### **Ticketing and Workflow**

Next Gen Andon allows your team to capture issues and set priorities across any areas that are important to your organization. Common areas that our customers are tracking include non-conformance reporting (NCR), safety incident tracking, downtime, quality issue follow-up, and warehouse escalations. Issues can be either automatically triggered based on rules and parameters you have established, or can be manually initiated as desired. Emails and text messages can be triggered when new tickets are created.

### **Statistical Process Control and Statistical Quality Control**

Statistical process control (SPC) and statistical quality control (SQC) with Epicor Advanced MES use real-time, automatic data to help you respond to production conditions to prevent making bad parts. SPC and SQC use factual data to enable consistent results without constant oversight. They compare cycle time and process data to control the limits you set—providing rich, instant information to machine operators, quality and reliability engineers, and maintenance professionals.

Any machine that feeds production and process data into your Epicor Advanced MES system can benefit from the Epicor Advanced MES SPC and SQC capabilities. It's capable of receiving any kind of data from machines—cycle time, temperature, pressure, weight, dimensions, or any other kind of measurement. Set and record process parameter control limits for each attribute, and specify sampling criteria. The system automatically administers data samples and alerts for out-of-spec

conditions. It applies statistical analysis to process conditions, so operators get an alert—even before things run out-of-spec—that something is trending negatively.

### **Digital Twin**

Digital Twin is a versatile tool that pulls data from IoT devices to produce a visualization of all your shop floor data. A digital twin is a representation of a physical system, recreated in software. Our Digital Twin system for manufacturing is built on top of your Epicor Advanced MES solution and is used to monitor processes, detect downtime, and predict performance.

Using the Epicor Advanced MES ABLE Digital Twin application's replay mode, you can go back in history and visually review information to see what caused an issue that occurred earlier in the day. Armed with factual information, manufacturers will be in a better position to implement continuous improvement programs to help improve efficiency on their shop floor.

### **Visibility, Reporting, and Analysis**

From the top floor to the shop floor, it's important to know how your business is performing at all times. That's why Epicor built a powerful, out-of-the-box reporting and analytics system that produces important information in easy-to-digest dials, graphs, and charts. Epicor Advanced MES scoreboards and displays empower your employees to take action and make improvements instantly, without having to wait for days or weeks to find out how they're doing, or if they face machine or tool problems.





Whether it's regarding maintenance, quality, or other operations, stakeholders have facts in-hand to support their recommendations, and leaders have what they need to understand tradeoffs from every angle.

Epicor Advanced MES paints a comprehensive picture of production.



### Schedule Optimization

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

### Epicor Connected Process Control

Epicor Connected Process Control is a no-code/low-code process control system with embedded digital visual aids that has the ability to connect to almost any device with communication capability. With Epicor Connected Process Control, you'll benefit from a simple path to digital transformation that can help improve efficiency, increase quality, and empower employees on your shop floor. Our powerful, web-based solution enables process control, operator guidance, traceability, and data collection down to the task level.

Our Epicor Connected Process Control solution helps you maximize quality and throughput on the plant floor while reducing costs, giving you a competitive advantage in a crowded marketplace. At Epicor, we strive to empower manufacturers to join the Industry 4.0 movement with cost-effective, easy-to-use solutions, helping you become agile, data-driven, and best-in-class.

By delivering a combination of process control and guided digital operating instructions, Epicor Connected Process Control helps users produce a consistent quality product and improve operational efficiency by tracking each individual task along the way. Use Epicor Connected Process Control to help eliminate paper from your work cells, onboard new employees efficiently, and optimize growth potential with a flexible, scalable solution.

### Quality Assurance

Extending your solution with the Quality Assurance module helps ensure that you gain complete visibility into your quality operations from a top-down view to the individual item level.

This allows you to tie together all quality functions, whether it's scrapping end parts, rejecting raw materials, or tracking first article inspections. Accurate costing demands that products moved through quality accurately reflect their value and are removed from the appropriate work in progress.

Additionally, Quality Assurance includes processes for supplier returns, with links to Accounts Payable for automated debit processing—closing the loop on traceability of products in and out of quality within the plant. Inspectors have queues of items to inspect with full disposition and corrective action follow-up, while plant floor employees can easily flag parts as nonconformant.

Epicor Quality Assurance functionality includes:



### **Collaborative Quality**

Collaboration among the right resources to improve quality often means redundant communication and events. Using Epicor Collaborate with quality groups enables quality events to be resolved faster, and longterm quality improves as a result of this collaboration.

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

### **Inspection Workbench**

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

### **Nonconformant Records (NCR)**

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

### **Non-Netting Bins**

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

### **Discrepant Material Report (DMR) Processing**

Aft er failing inspection, generate a DMR to help provide the material review board (MRB) with an online queue of parts that need to be dispositioned.

### **Corrective Action**

Develop and track all preventive and corrective actions online. With due dates, audit sign-off s and unlimited comments, corrective actions help provide for followup of quality issues.

### **Material Review Board (MRB)**

Disposition parts by an MRB aft er they fail inspection. Online documentation helps provide an audit trail of MRB actions.

### **Cost of Quality**

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

### **Packing Slips**

Print a customizable packing slip for all parts returned.

### **Debit Memos**

When you generate a debit memo in DMR processing, it is automatically tied to accounts payable.

### **Audit Trails**

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



### Certificates of Compliance

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

### Enhanced Quality Assurance

Traceability and audit of quality data drives businesses to develop “systems,” many times paper-based, to support the collection and use of quality testing data. Enhanced Quality Assurance is designed to extend base Quality Assurance with support for the management of controlled test plans along with the results for products, groups of products, processes, and other testing.

It offers the ability to define testing elements or attributes, as well as lists of attributes to test which can be used to measure against testing results for pass/fail decision criteria. It includes the data used for Statistical Process Control (SPC) and is easily accessed to build SPC analysis. In essence, Enhanced Quality Assurance gathers the data and makes it available to help ensure that your next audit goes smoothly.

### Inspection Plan

Build inspection plans that utilize specification lists and inspection attributes. Define unique business inspection attributes or characteristics. Attributes can be numeric,

character, date, check box, combo box, or comments. Sets of attributes define test plan inputs with additional criteria including minimum and maximum values expected, as well as combo box choices and document attachments.

For optimum control, each specification list is revision controlled. Inspection plans use embedded configuration capabilities to build input screens tailored to each unique test plan, and lay out fields and data to match quality department expectations. Default documents can be tied to the inspection plan. For optimum control, each test plan is revision controlled.

### Flexible Inspection Plan Configuration

In addition to the dynamic nature of the inspection plan (i.e. results entry form is dynamically built based on the tied specifications list), multiple inspection plan/specification lists sets can be tied to a part, operation, or equipment.

This flexibility supports requirements for standardized test plans to sit alongside product or product-group-specific test plans, with results entry and collection of data for both during inspection.

### Flexible Results Collection

Collect and store results data for each sample alongside appropriate job, part, inspection plan, serial number, lot number, purchase order data, and more.

Results data can be used to produce compliance documentation and is available for audit purposes online through the Inspection Results Tracker.



### Support for Inspection Types

Make first article inspections and store results for audit and analysis. Tie inspection plan/specification combinations to an operation to trigger results entry for the operation during collection of data on the plant floor. Perform receiving inspections on parts subcontracted to a specific supplier. Track results and generate supplier performance metrics with data from sample results.

### Skip Lot Cycle Definitions

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

### Resource Calibration Test Plans

Used in conjunction with Maintenance Management, Enhanced Quality Assurance offers the ability to predefine inspection plans for resource (gauge) calibrations along with managing the last calibration date.

### Training Course Management

Manage employee training events for both onsite and offsite training, including management of training costs. Assign instructors and set schedules for courses. Employees can be assigned appropriate courses to attend or can request training themselves. Review employee training with the Training Course Tracker for proof of certification to perform work.

### Real-Time Quality Analysis

Whether responding to a bad test result immediately with Epicor BPM (alerting a quality manager about a critical result), performing trends analysis or responding to an auditor request with data pulled from a Business Activity Query, or reviewing supplier performance using analysis cubes and dashboards, all the data you need is available with a robust tool set supporting your unique business requirements.

Complete functionality includes:

- Statistical process control (SPC) data
- Returned material authorization (RMA) inspection
- Data collection enabled
- Serial and lot traceability
- Inspection collect results location
- Inspection data tracker

### Epicor Quality Management System (QMS)

Epicor QMS is a cloud-based adaptive quality system that enables manufacturers to optimize critical quality processes that deliver a clear business advantage for their organization. Epicor QMS enables customers to optimize the critical quality processes that drive product and service excellence and deliver a clear business advantage for their organization. The Epicor Base QMS Solution is foundational, and includes capabilities and processes that drive the most critical and fundamental quality management programs. The Base QMS Solution can be augmented with individual or multiple solutions that bring new functionality to meet specific QMS, EHS, and compliance needs.

Capabilities include:

- Nonconformance handling
- Delegation & escalation
- Corrective action (CAPA)
- Document control
- Training management
- Risk assessment
- Supplier, materials and chemicals
- Receiving and inspection
- Release management
- Change management
- Return material authorizations (RMAs)
- Complaints handling

In addition to the base quality essentials, there is also support with Epicor QMS for:

### Epicor Supply Chain Management

Help ensure finished product quality with automated control and visibility over all elements of your supply chain, from local manufacturers to global suppliers.

Track suppliers and materials, build qualitative and quantitative supplier ratings, and trigger actions to improve supplier quality and performance.

Using the Epicor QMS module, you can handle supplier related quality aspects such as:

- Supplier Corrective Actions (SCAR)
- Supplier and Material Qualification
- Supplier Ratings
- Production Part Approval Process (PPAP)

## Quality by Design

Build a culture of quality, starting with step one of the product and service design process. Analyze product and process plans, establish metrics and benchmarks, and track the most critical quality processes across an organization.

Capabilities include:

- Project control (APQP)
- Product specification management
- Failure modes and effects analysis (FMEA)
- Hazard analysis and critical control points (HACCP)
- Assets, calibration and maintenance

## Complaints Management for Life Sciences

Turn regulatory and compliance requirements from an obligation into a strategic advantage.

Automate complaints handling and regulatory submission in compliance with 21 CFR Part 11 and Annex 11 guidelines. Optional validation toolkits and services help support ongoing compliance needs for businesses in life sciences.

## Health and Safety

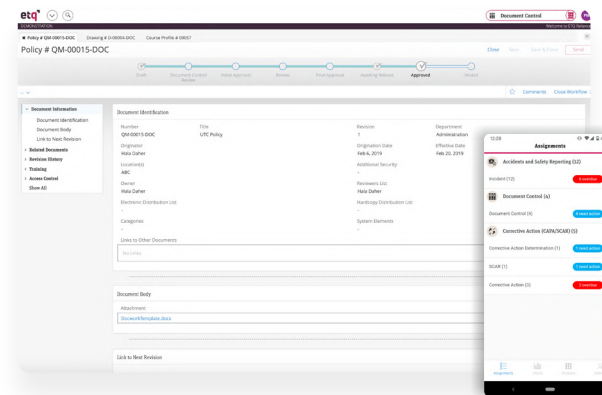
Move from a reactive problem-based approach and build a culture of workplace safety with a proactive, risk-based program that minimizes hazards in the workplace and helps ensure effectiveness of controls.

## Environmental Management

Make environmental management a strategic business priority. Identify environmental impact targets, log permit information, oversee waste water and emissions management, and track sustainability initiatives.

## Enterprise Risk Management

Automate several key quality processes that allow companies to incorporate risk-based thinking into organizational planning and operational monitoring. Identify and objectively assess risks companywide and leverage risk data to drive long-term mitigation and improvement.



*Optimize critical quality processes with Epicor QMS.*







## ○ Service and Asset Management

Service and Asset Management capabilities are designed to help manufacturers and service organizations maintain equipment, optimize customer service, and keep all technicians and customer support personnel informed. We understand that your business needs to provide quick responses to customer incidents, keep your field operations informed and productive, and process returns quickly. Service Management and Epicor FSM solutions help provide the visibility and accountability your business needs. Effective enterprise maintenance management solutions for monitoring and managing the deployment, performance, and maintenance of company and customer assets may be the most important tools for preventing operational surprises. Epicor solutions enable manufacturers, distributors, and service organizations to save time and money by optimizing maintenance resources—improving equipment uptime and maintenance as well as field staff productivity.

- Service Management
- Returned Material Authorization
- Service Contract and Warranty Management
- Case Management
- Maintenance Management
- Epicor Field Service Management (FSM)





## Field Service

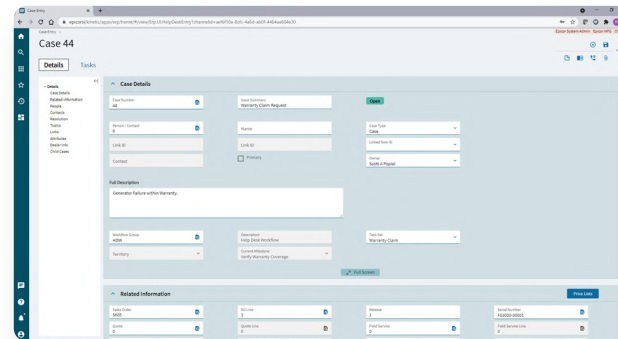
Field Service is primarily designed for manufacturers who bring customer assets in-house for repair, or have light requirements for service or installations offsite that do not require purpose-built mobile access for field technicians. You can centralize all processes related to dispatching technicians and reporting costs of service calls in the field with support for drop shipment of service parts directly to the customer site.

## Returned Material Authorization

Enhanced return processing of ers enterprise-wide tracking of pending returns and disposition of these parts by a unique returned materials authorization (RMA) number. Enter information about returns and transfer that information to the different groups that may need to take action—like inspection, billing, and order processing.

## Service Contract and Warranty Management

Contract Management—used in conjunction with Service Management—allows for the timely and accurate execution of service contracts—including the ability to generate service-level agreements with automatic billing options. Service contracts can be established for specific products, customers, and service-level agreements—each with an expiration date that is automatically tracked for easy manual look-up. The Service Call Center Workbench allows you to add or update service orders, schedule services, execute purchase and material planning, and manage warranty and service contracts.



*Case Management—Shorten service response time by collecting detailed product problem information and using integrated features to initiate requests to the appropriate resource.*

## Case Management

Fully integrated with Epicor FSM, Epicor Case Management lets you easily access dispatching field activities and help provide field service representatives with access to online knowledge bases, existing customer field service calls, warranty information, and service contracts. Comprehensive contact management, communication, and traceability capabilities allow you to efficiently manage and record all customer and staff interactions across the enterprise. You can also link documents and communication events like emails and calls.



## Maintenance Management

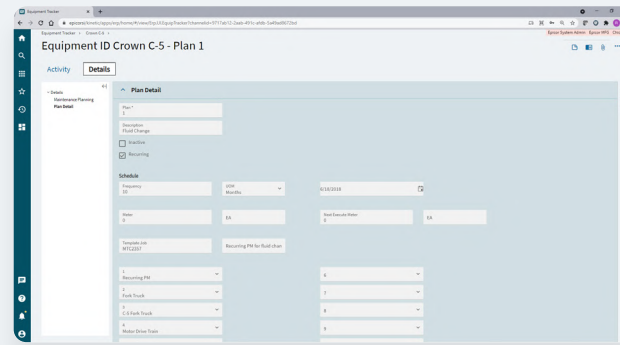
Epicor Maintenance Management helps provide a comprehensive toolset for critical production and facilities equipment maintenance. It was designed to address maintenance request processing, planned preventative maintenance—according to predefined schedules—and ad hoc break/fix maintenance processing for a single piece of equipment. Facilities and production equipment can be scheduled for maintenance based on a predefined service interval, usage, time, or via manual requests. This can include internal capital equipment, tools, gauges, and fixtures—such as air conditioning units, forklifts, shelving, and shop floor tools.

Eliminate manual input by creating maintenance work orders automatically from templates for routine maintenance—like oil changes, filter replacements, or belt changes—to eliminate, and then complete preventative maintenance work plans. Automatically create maintenance work orders when preventative maintenance is due. Create maintenance plans based on timing or meter frequencies. Once a preventative or regular maintenance work order is established, the maintenance planner can schedule equipment downtime and trade resources and materials as needed. Include scheduled maintenance events—such as resource requirements—in the production schedule for better capacity planning.

When maintenance has been performed on equipment, the operators can record their hours, materials used, and closing remarks regarding the repair or service. The Maintenance Management module maintains

all equipment, material, and work histories. You can produce complete repair histories for each piece of equipment—including parts and labor cost.

Standardized reports—such as the Maintenance Work Order Request Report, Maintenance Work Order Report, and Equipment List—help maintenance technicians and managers organize and communicate maintenance events and review histories.



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

## Epicor Field Service Management

Epicor Field Service Management (FSM) integrates directly with Kinetic and is designed for manufacturer that use mobile field resources. The tool allows companies to connect with their customers and their customers' equipment while automating and streamlining the service process. The solution allows

customers to save time and make better informed decisions with quick access to customer information, equipment service history, and technician availability and skill level.

FSM contains many crucial field service capabilities that go above and beyond those included within the core Kinetic offering.

These capabilities include:

- Scheduling and dispatching
- Equipment service history tracking
- Signature capture for end-of-service verification
- Off-line mobile capabilities
- User-defined checklist for technicians

Epicor FSM focuses on delivering both wholistic and microscopic views of field service operations, resources, technicians, and schedules. Usability of the mobile interface, seamless connection to data, and real-time updates allow customers to take field service activities to a higher level.



## ○ Epicor Financials

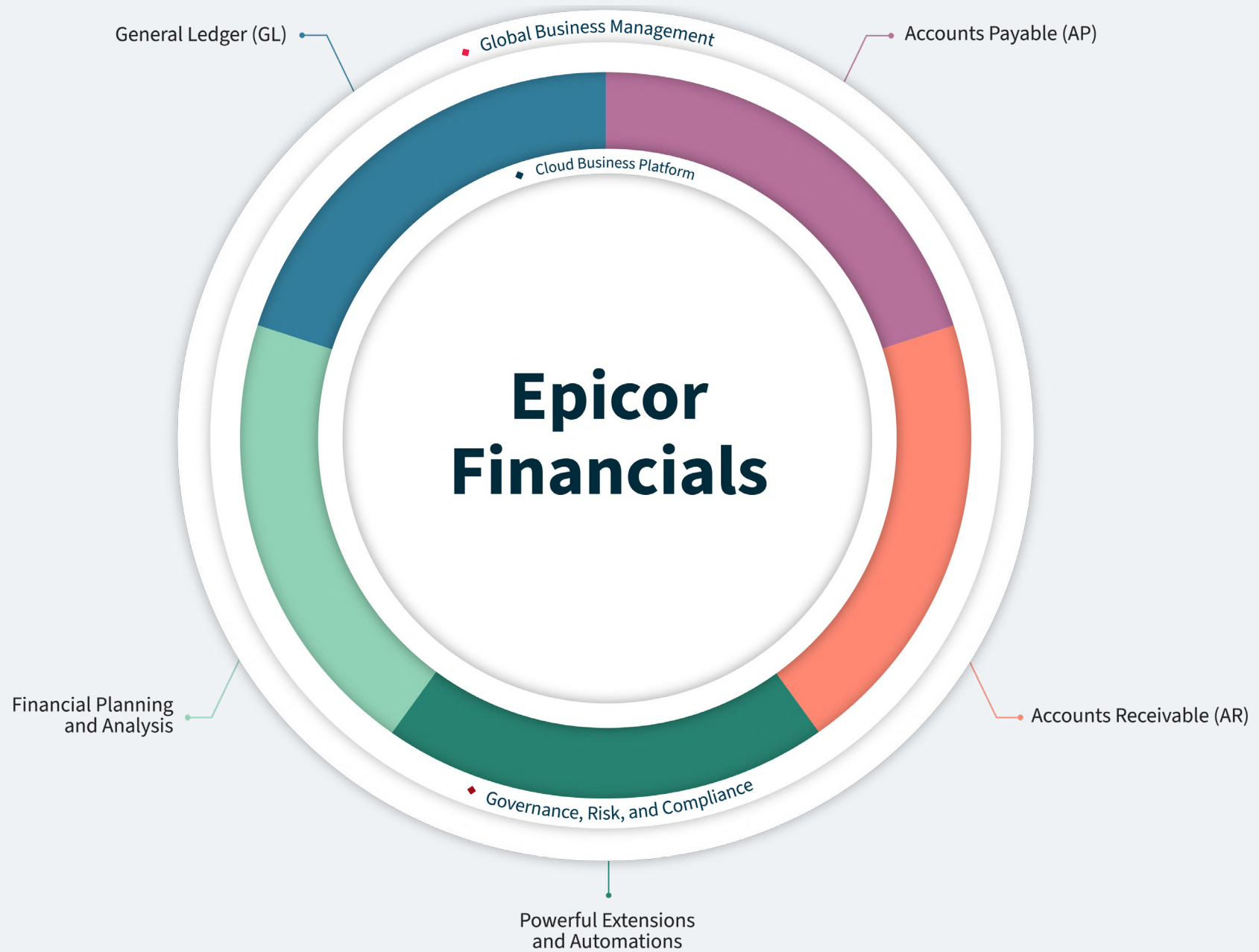
Epicor Financials offers a refreshing new approach to business. A suite of accounting applications built for insight, automation, and compliance in an increasingly global business world, it is built around a series of “global engines” that support effective financial management and control anywhere.

Our goal is to help every business go beyond sound financial management and control to efficiently deliver real value. Epicor Financials gives you access to real-time fiscal information and helps provide the modern platform you need to support business around the world.

- Global Engines
- General Ledger
- Accounts Receivable
- Accounts Payable
- ECM AP Automation
- Requisition Management
- Epicor Financial Planning and Analysis (FP&A)
- Epicor Data Discovery
- Epicor Electronic Reports
- Epicor Payments
- Credit and Collections
- Epicor Rebates
- Tax Automation
- Asset Management









### General Ledger (GL)

- Chart of Accounts
- Multiple Books
- Configurable Posting Engine
- Advanced Allocations
- Consolidations
- Reporting Currency

### Account Receivable (AR)

- AR Invoicing and Payments
- Electronic Interfaces
- Multiple Payment Instruments
- 1099 Forms
- AP/AR Netting
- Payment Centralization
- Lockbox
- Automated Clearing House (ACH) Payments
- Deferred Revenue Accounting
- Interest Invoices

### Financial Planning and Analysis

- Financial Statements
- Excel- and web-based Financial Reporting
- Consolidation
- Financial Budget Planning
- Machine Learning Supported Revenue Forecasting
- Role-based Analytics
- Dashboards and Drill-Down
- Mobile Business Intelligence

### Powerful Extensions and Automations

- Mobile Time and Expense Entry
- Project Management
- Asset Management
- Rebates
- Payroll
- E-Commerce
- Tax Compliance and Automation
- Credit Card Payments
- Credit and Collection Automation
- Automated Requisition Approvals
- AP Automation with OCR, AI Support
- Online Collaboration
- AI-driven Virtual Agent Mobile App
- UI Customization and Personalization
- Business Process Automation
- Automation with 1000+ External Services

### Account Payable (AP)

- AP Invoicing and Payments
- Petty Cash
- Multiple Payment Instruments
- Automated Clearing House (ACH) Payment
- Positive Pay
- MICR Check Printing

### ◆ Cloud Business Platform

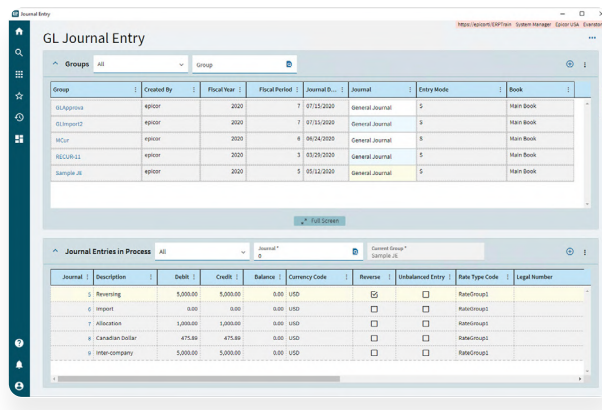
- Mobile, Browser-based Experience
- Enterprise Search
- Epicor Learning
- Updatable Dashboards
- REST API Services
- EDI and B2B Integrations
- Regularly Scheduled Upgrades
- Robust, Secure, Reliable Environment
- Global Coverage of Microsoft Azure Cloud Data Centers
- Multiple Mobile Applications

### ◆ Governance, Risk, and Compliance

- Corporate Governance
- Risk Management
- Security Management
- Global Trade Compliance
- Personal Data Protection PCI DSS Compliance
- ITAR and CMMC Compliance
- Epicor Identity Provider
- Multi-factor Authentication
- Quality Management
- Environmental Protection
- Energy Consumption Monitoring
- Sustainability

### ◆ Global Business Management

- Country Specific Functionality Packages
- Electronic Invoices
- Electronic Reports
- Master Data Management
- Multi-lingual Data Management
- Multi-company, Multi-currency Engines
- Intercompany Transactions
- Scalable, Distributed Deployment



*The General Ledger (GL) allows the entry of transactions manually with the GL Journal Entry program.*

## Global Engines

Epicor Financials is built around a series of unique global engines, which in turn support the global nature of business today, enabling effective operations in existing and new markets—as necessary.

At the heart of the Epicor solution, global engines are designed to add accounting agility and flexibility to your business, while simultaneously allowing you to meet the local financial and legal compliance requirements of individual markets.

- Complete functionality includes:
- Rules-based posting engine
- Configurable tax engine
- Legal numbering engine
- Multicurrency engine
- Rounding engine

## General Ledger (GL)

General Ledger is the heart of Epicor Financials, processing and posting all accounting transactions made throughout Epicor applications, as well as entries made directly within the ledger. The information and controls which flow from the General Ledger system enable an organization to operate efficiently, comply with fiscal regulations, underpin strong corporate governance, and drive enterprise performance.

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

## Multiple Books

At the core of the General Ledger, Epicor Financials helps provide flexible financial accounting representations through multiple book functionality, which flow all the way through to financial reports and statements. “Multiple Books” allows the establishment of unlimited financial books to support a wide variety of financial requirements, such as budgeting and forecasting, statutory and government accounting versus management accounting (for example, US GAAP and non- GAAP, etc.), and comprehensive consolidations. Epicor Financials helps provide the tools to seamlessly handle the accounting representations from your various subsidiaries while at the same time giving you a consolidated view of the one version of the financial truth for your organization.

Key highlights and benefits of using Multiple Books within your company:

**Chart of Accounts:** Generate different chart of accounts by book, post transactions to different accounts within different books simultaneously using the posting engine.

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

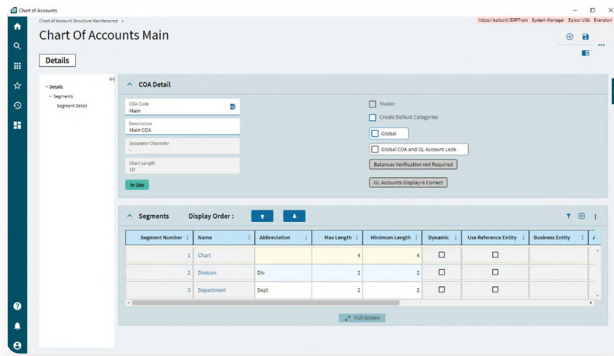
**Multiple Closing Calendars:** As businesses acquire new businesses there is often a need to maintain different calendars for “stub” periods, or for example, up to 18 months to bring the acquired company in line with the fiscal calendar of the acquiring business. Each established book can operate a completely independent fiscal calendar as applicable.

**Calendar Adjustment Period:** General Ledger has built-in support for an additional year-end period, to be defined as a part of your calendar that will be used for year-end adjusting entries.

## Chart of Accounts

Epicor Financials allows up to 20 user-definable segments within the Chart of Accounts. These can be used for accounting and reference purposes—giving you the ability to record, store, allocate and report on important financial data at a highly granular level. With a total of 200 characters available, Epicor allows you the flexibility to manage your financial operations exactly as you need.





The Chart of Accounts program allows you to have multiple charts of accounts, with dynamic accounting segments that are customizable in the system.



## Balance Controls

Epicor Financials allows users to define the frequency at which balances on accounts are captured and stored. Often used to facilitate the calculation of Average Daily Balances, this flexibility enables the user to update account balances as frequently as required by the organization: by hour, by day, by week, or by month.

## Consolidations and Eliminations

Epicor Financials meets the needs of businesses today through integral financial consolidation at either a summary or detailed transaction level, providing the flexibility to consolidate from different books and/or companies within a defined relationship.

- Merge balances (and underlying transactions) from one or more books into a single consolidated view of financial information, from which financial reports may be prepared, while at the same time creating the supporting elimination journal entries as a result of the process.
- Re-measure accounting transactions and financial results based on the differences in the consolidated currencies using differing rate types (e.g., spot, fixed, etc.).

## Advanced Allocations

Automation and control of repetitive processes is one of the major benefits of using the Epicor Financials Suite. Advanced Allocations automatically computes cost and revenue allocations along with the resulting journal calculations, streamlining processes, increasing relevance, and improving accuracy.

This results in shorter close cycles and more accurate financial statements.

Advanced Allocations allows for sophisticated allocation of cost and revenue to multiple projects or departments or locations—ultimately to any entity represented in your corporate financial accounting structure.

- Allocate balances or transactions using static or dynamic calculations.
- Base allocations on Business Activity Query (BAQ)-derived dynamic data such as monthly revenue, help desk service calls per month, etc.
- Structure hierarchical or tiered allocations to run sequentially in batches.
- Maintain allocation history for reuse, review, and analysis.
- Reverse allocations easily, when required.

## Cash Management

Improve cash management through the automatic handling and reporting of discounts available, payment due dates, and payment selection methods. This module also allows you to specify the number and type of bank for each of your accounts—including currency—and reconcile your bank statement with entries generated in AR, AP, and payroll. Upload electronic bank statements and automatically reconcile them with transactions in the Epicor Financials system as well as performing manual allocations.





### **Aging Information and Customer Reminder**

View aging information on the screen or print it in one of several formats. Accounts Receivable offers a Customer Reminder features that allow companies to track the history of their customers' AR balances, together with the option to issue them user-defined reminder letters.

### **Automatic Finance Charges**

Finance charge invoices can now 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.

### **Bill-To Customer**

Epicor Financials 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' for that customer).

### **Manual Selection of Invoices**

A manual selection option to get Invoices and Recurring Invoices is available within Invoice Entry. This allows the selection of particular or multiple invoices or recurring invoices for posting, instead of selecting all available items at once.

### **Credit Manager Workbench**

Easily view all credit-related information surrounding a customer. The credit manager workbench provides a single point from which to manage credit status, order credit status and account management, with drilldown to all associated information.

### **National Accounts**

The National Accounts (HQ Accounts) feature provides the ability to include customer relationships, either hierarchical or the more traditional parent/child type, within Accounts Receivable. This functionality allows customers within a National Account group to accept invoice payments from any customer within the relationship. The functionality also permits extensive credit checking across the National Account group with credit available to be split across levels with or without variable pooling.

### **Flexible Tax Engine**

Epicor Financials contains a feature-rich flexible Tax Engine which allows businesses to configure Epicor applications for local and international financial reporting standards, as well as unique local tax jurisdictions. Tax tables within the Tax Engine include the ability to define or override rate effective dates. The Sales Tax Register lists invoice totals and tax amounts by customer for codes on file.

### **Settlement Currencies**

You can record currency gains and losses at the time of settlement. Through this functionality, you post amounts correctly when you invoice in one currency but are paid by the customer in another currency.



## Settlement Discounts

The application contains two methods for handling early settlement discounts on sales and tax values. The settlement amount is taken by the customer on the AR invoice. The potential discount is then included in the tax values calculated for VAT.

## Terms and Conditions

Epicor supports all of the most common business practice terms and conditions within Accounts Payable and Receivable. This feature also affords great flexibility for the definition of creative receipt and payments terms within countries where this functionality is not necessarily demanded but may offer a competitive advantage.

Terms and Conditions are user defined, but typically include: End of month plus n days, End of following month, Specific due dates in a month, 2% 10 days and Net 20 days.

## Electronic Report Formats and Transmission

Submit various legal reports electronically, 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.

Complete functionality includes:

- Cash receipts
- Interest invoices
- Invoice GL account definition
- AR transaction adjustments
- Deferred revenue

- Consolidated invoicing
- Automatic credit holds
- Invoice/statement forms
- Invoice-based sales commission payment
- Multi-format sales analysis
- Credit card management and authorization
- Settlement currencies
- Settlement discounts
- User-friendly invoice and customer tracker
- General Ledger interface
- Cash management interface
- Reconciliation report

## Accounts Payable

Accounts Payable (AP) allows you to enter supplier invoices for purchases that you make, and then generate 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.

AP 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 AP, you will know how much you owe and when it is due.

## Invoices, Debit Memos, Payments

Record and post all payables instruments easily, including supplier or vendor vouchers and invoices, debit memos, automated check runs, and manual payments.

## Payment Instruments

Track the different types of credit instruments such as Promissory Notes and post-dated checks and their corresponding status, from initial generation or receipt through to clearance/settlement.

Track the movements of the payment instruments and generate status change updates within the Accounts Payable and Receivable applications; these changes can be reflected in the General Ledger to properly record to the financial status of the asset or liability.

You can track how your customer credit is maintained through the life of the payment instrument reflecting the available credit, based on the status and final settlement of the payment instrument. By using this functionality, you can be assured that complex, settlement-related taxes are correctly handled when payment is made via payment instruments.

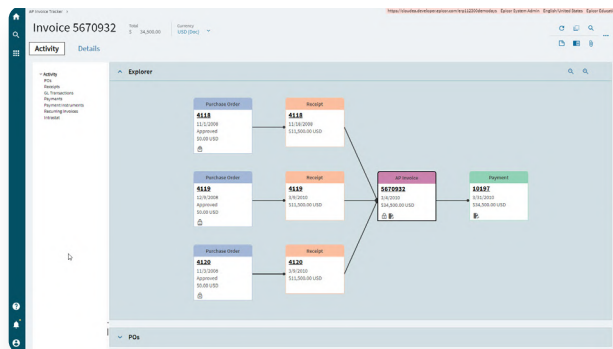
## Bank Electronic Payments

The ACH functionality in Epicor Financials helps to automate cash flow between your bank and the banks of strategic suppliers and main customers. Electronic Fund Transfers (EFT) through ACH contribute to the elimination of check fraud to a great extent.

The ACH functionality is currently only available in the U.S. and Canada. The standard (domestic and international) and the Wells Fargo formats are not licensed and available for all users. It works with the Positive Pay capability in Epicor Financials, supporting the Bank of Boston, Chase, Fleet, Union Bank, and Wells Fargo systems.

By customizing the standard formats, it is possible for any users to maintain and update the automated payment mechanism easily and quickly, decreasing the time and cost needed for professional services. Multiple banks are supported, allowing businesses to further reduce costs by using different banks for the domestic and the international transactions.

The ACH functionality supports direct debit operations that allow your company to collect either single or recurring payments from your customers in an automated way. ACH is compatible with the Epicor Payroll module, so transfers to employees, such as expense reimbursements, government benefits, tax refunds, and interest payments are all fully automated.



*Visual representation of invoices, payments, and shipments in the AP Invoice Tracker.*

### Relationship Chart for Procurement

The first dynamic chart of its kind is introduced in Epicor Financials, a new relationship map, helping finance experts to review transactions in a more structured and visual way. This lets viewers see a high-level overview of complicated purchase transactions, saving them time by not having to look at each entry separately. The new relationship chart offers increased transparency, shows the links between orders, invoices, and payments, lets these be one-to-one or one-to-many, and includes partial payments or multiple invoices against a purchase order.

### AP Terms and Conditions

Epicor supports all of the most common business practice terms and conditions within Accounts Payable and Receivable.

This feature also affords great flexibility for the definition of creative receipt and payments terms within countries where this functionality is not necessarily demanded, but may offer a competitive advantage.

Complete functionality includes:

- Recurring entries
- Deferred expenses
- Voided numbers
- Online cost updates
- Exchange rate at payment entry
- Supplier tracker
- Supplier statements
- General ledger interface
- Cash management interface

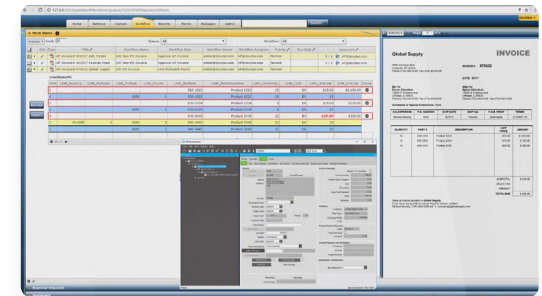
- Checks
- Electronic funds transfer (EFT)
- Multiple remit-to
- Three-way match



## ECM AP Automation

Epicor ECM captures and automatically processes your AP invoices from multiple inbound sources, including existing document scanners or multifunction copiers. Invoices are automatically routed for two-way and three-way matching workflows and approvals.

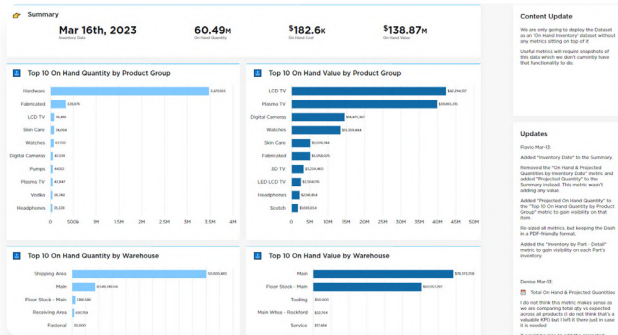
- Automatically capture and process vendor invoices
- Improve accuracy with automated data matching
- Speed procure-to-pay processing time
- Invoice approval anytime, anywhere
- Improve vendor setup and management
- Enhance visibility and control of the AP process
- Electronic document storage helps ensure safety and security of all files in the event of a disaster
- Non-inventory requests for goods and services are linked directly to GL accounts including budgets and GL splitting ability
- Epicor suppliers and preferred suppliers are supported including integration with their online catalogue or web store
- Multiple location and multiple company requisitions are supported
- Purchase Orders, Transfer Requests, Receipts, and Accounts Payable Invoices are automatically generated within Epicor
- Easily produce a Request for Quote (RFQ) for suppliers to invite them to bid on your purchase request
- Access or 'punch-out' to a supplier's web store and add items to the supplier's shopping cart



*ECM AP Automation powered by Epicor ECM offers a workflow-based invoice recognition and transaction creation.*







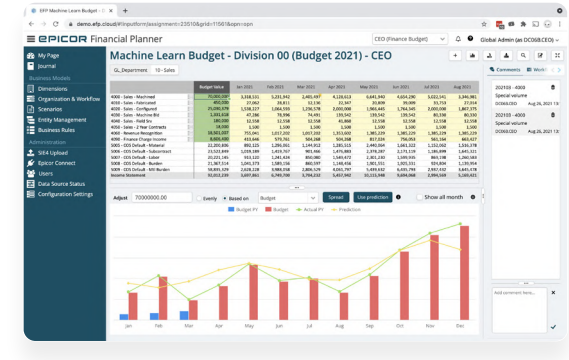
The new Finance Content Pack in Grow delivers data visualization, charting, and dashboards on key finance metrics.

Epicor FP&A is a robust FP&A solution which covers financial reporting & analysis, budgeting, planning, forecasting, and consolidation in a single, easy-to-use tool. There are four different packages within Epicor FP&A to choose from that cater to small, medium, and large companies. It features both an Excel add-in and a web-based user interface. It is modular and starts with financials but comes with add-on modules that can be added to its base package to extend the scope of data included beyond just financials. Spreadsheet Server by insight software is a popular, performant Excel-based financial and operational reporting solution with an Excel add-in. Spreadsheet Server can access multiple databases, even from different regional cloud data centers across the globe. It utilizes the Change Data Capture capability built in to Epicor Financials to get the latest data changes since the last refresh, making it to a fast, near real-time reporting solution both for cloud and on-premises systems.

### Grow, an Epicor Solution

Grow is a state-of-the-art business intelligence solution built into Epicor Financials, empowering everyone in the finance team with data-driven decisions. This is a no-code, full-stack solution that anyone can use to visualize and explore any data in or outside Epicor Financials in minutes. Grow provides endless dashboarding possibilities for your citizen analysts.

Grow is equipped with a Finance Content Pack, giving you a high-level, visual overview on the most important finance Key Performance Indicators (KPIs). It does not deliver financial reporting, financial statements, drill-down to data, or budget planning.



Epicor FP&A is a robust financial budget planning and reporting solution with both an Excel add-in and a web-based view, designed to tackle very complex calculations and scenarios, such as consolidations

### Epicor Financial Planning and Analysis (FP&A)

Epicor FP&A is a well-liked and highly recommended solution for financial planning and analysis. This cloud-based solution for financial reporting, budgeting, planning, forecasting, and consolidation offers two interfaces for its users: Web and Excel. Despite being in the cloud, Epicor FP&A can connect to ERP systems deployed on-premises or in the cloud.

The focus of Epicor FP&A is delivering best practices to finance users of the make, move, sell markets, and offering quick time to value. Epicor FP&A, as a solution, understands that the journey to the target operating model of co-piloting the business requires that finance has at least a granular understanding of their performance. As a reporting and budgeting tool, Epicor FP&A gives you that data granularity. You get powerful drill capabilities that lets you dig into journal transactions, and further down to invoice trackers.

It is a tool that has a built-in understanding of your ERP structures making it easier to get started with your reporting, budgeting, planning, and forecasting transformation. At the same time, it offers you the flexibility to configure your Charts of Accounts set up in a way that reflects the way you report and budget. All implementations of Epicor FP&A utilize the crawl-walk-run approach. The implementation typically begins with financial data to get the users up and running quickly. You can then extend your scope of data to Sales, AR, AP, HR, and other operational data as you get comfortable and as your need arises. Here are samples of its rich capabilities. This is not an exhaustive list.

- Baseline prompt when creating reports
- Powerful processing power for generating, modifying, and updating reports
- Includes out-of-the-box reports and budget sheets
- Powerful drill functionalities
- Superior formatting capabilities
- Use of dimensions in reports
- Excel and Web reports
- Pragmatic budgeting workflow
- Budgets and forecasts powered by Machine Learning
- Rolling forecast support
- Spreading rules
- Version control
- Unlimited what-if analysis
- Built-in business rules engine
- Multi-company, multi-currency support
- Allocations
- Eliminations
- Single and unified platform for end-to-end processes

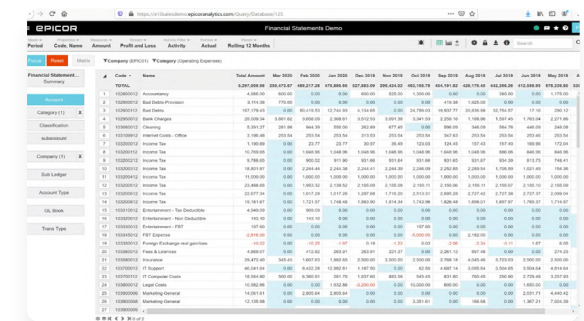
## Epicor Data Analytics Financials

Epicor Data Analytics is a fully cloud-based product with a web-based interface, available from any modern web browsers, supporting both cloud and on-premises deployed systems. Epicor Data Analytics is primarily a BI solution covering all business areas of the ERP system. However, the two latest modules, namely Epicor Data Analytics Financial Statements and Epicor Data Analytics Budgeting and Forecasting, provide an easy-to-use financial reporting solution with the single source of truth, fully integrated to Epicor Financials.

Epicor Data Analytics Financial Statements allows financial experts to create their most important financial reports without a hassle, such as Income Statement, Trial Balance, Balance Sheet, Cash Flow, and more. Reports can be produced, customized and shared in the web-based user interface in minutes. Exporting financial statements in Excel format makes the additional calculations easy. With the security setup assigned to each GL account or dimension, the department, cost center, and other business leaders can review their own areas and manage their own P&L, respectively. The reporting process is democratized and finance teams do not need to generate new reports each and every time that business users ask for new data or report layouts, as they can self-service their own needs with customization, drill down to transactional levels, as well as using arbitrary external databases or non-financial data.

Epicor Data Analytics Budgeting and Forecasting is a real-time, online collaboration tool to perform financial budget planning with multiple stakeholders.

The workflow-based approval process is easy to set up and manage; business leaders can plan their budgets in many ways with custom calculations and budget drivers with top-to-bottom or bottom-up planning. The revenue forecasting capability uses actual data and can consume any financial statements created in Epicor Data Analytics as a data stream, while supporting the rolling forecast approach.

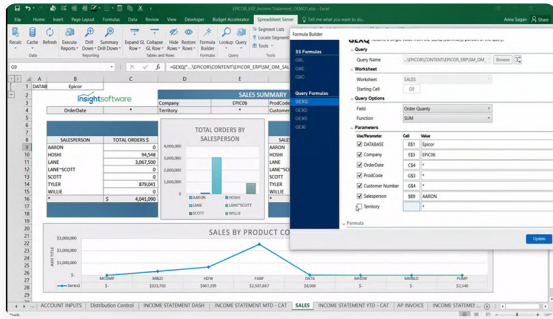


*The Financial Statements module in Epicor Data Analytics is a powerful financial reporting solution available in a web browser. Users can export reports in MS Excel format anytime, from anywhere.*

## Spreadsheet Server

Spreadsheet Server is a robust, performant Excel integration product for financial reporting. Almost all finance experts work with Excel and make calculations that help with their everyday financial operational reporting.

Spreadsheet Server is an Excel add-in that provides out-of-the box reports, not only for financials, but for any key business areas. Key attributes of Spreadsheet Server include:



*Spreadsheet Server provides Excel-based reporting. As all finance experts are familiar with Excel, the learning curve is short. The reports remain intact during the migration to cloud, or during a scheduled cloud upgrade, as only the data connections need a change.*



- View attachments from financial reports
- Drill down to transactional details, look at invoices, delivery notes
- Dynamic GL account ranges in financial reports
- All users access all live databases
- VPN supported
- Multi-language Excel ribbon in English, French, German, Italian, Portuguese, Spanish, Swedish, and Turkish

Spreadsheet Server uses the Cloud Connector to retrieve data from cloud-deployed systems. The Cloud Connector has a great reporting database that uses the Epicor-developed Change Data Capture feature to provide frequent data updates and achieve a near real-time reporting experience. Spreadsheet Server also supports on-premises deployments with ODBC connections.

## Epicor Data Discovery

Epicor Data Discovery is the data visualization tool built into Epicor Financials. Driven by real-time Business Activity Queries (BAQs) in Epicor Financials and other data sources, Epicor Data Discovery provides these Finance role-based views:

- AR balance
- AP balance
- Sales YTD vs. LYTD
- Customers past due on payments, a.k.a outstanding receivables
- Not invoiced shipments—number and amount
- Aged payables
- Aged receivables

## Epicor Electronic Reports

If your business needs to generate an electronic report from the Epicor Financials system, the Epicor Electronic Reports module is a great solution that allows experts to deliver data report files in diverse formats such as XML, JSON, PDF and more.

Epicor Electronic Reports features a user-friendly query editor solution, the Business Activity Query (BAQ) designer that every user has access to and which allows any user to generate data queries easily with filters, conditions, and summaries. The data source can be any areas of the system, but this module is mostly used for financial data reporting such as GL transactions, Chart of Accounts, balances, electronic VAT reports, and invoice transactions.

Third party organizations often require financial data in electronic format, such as customers, suppliers, auditing firms, analysts, advisory companies, banks, investors, or authorities.

Publicly traded companies are obliged to file their financial statements, quarterly reports, and many forms to the Electronic Data Gathering, Analysis, and Retrieval (EDGAR) system used at the U.S. Securities and Exchange Commission (SEC).

Epicor Electronic Reports also support electronic invoicing and digital signature solutions. The Epicor Country-Specific Functionality (CSF) packages uses this module to provide digital report files required by local legislations across the globe. Epicor Electronic Reports helps your company do business globally.



Examples of application areas include:

- Compliance/audit reports
- Electronic financial statements in international standards (US-GAAP, IFRS etc.)
- SAF-T reports
- Tax return filings
- Electronic documents
- Electronic sales / purchase orders
- Electronic ledgers
- Electronic invoicing
- Bank payment files in XML format
- EDI transfers

### Country-Specific Functionality (CSF) Packages

When expanding your business to new regions or countries, the CSF packages provide access to a range of functionality required either by law, by a specific industry, or by a widely used local process. The CSF packages are developed, tested, and released with each Epicor Financials release, helping ensure a seamless experience for any users in the given country.

**Please reference page 82 for more regional information on the CSFs.**

The CSF packages can be purchased separately for each country; these packages contain detailed documentation on the configuration of the add-on functionality included.

The user adoption and learning cycle of a CSF package triggers minimal effort, because the interface looks exactly the same as Epicor Financials. New application

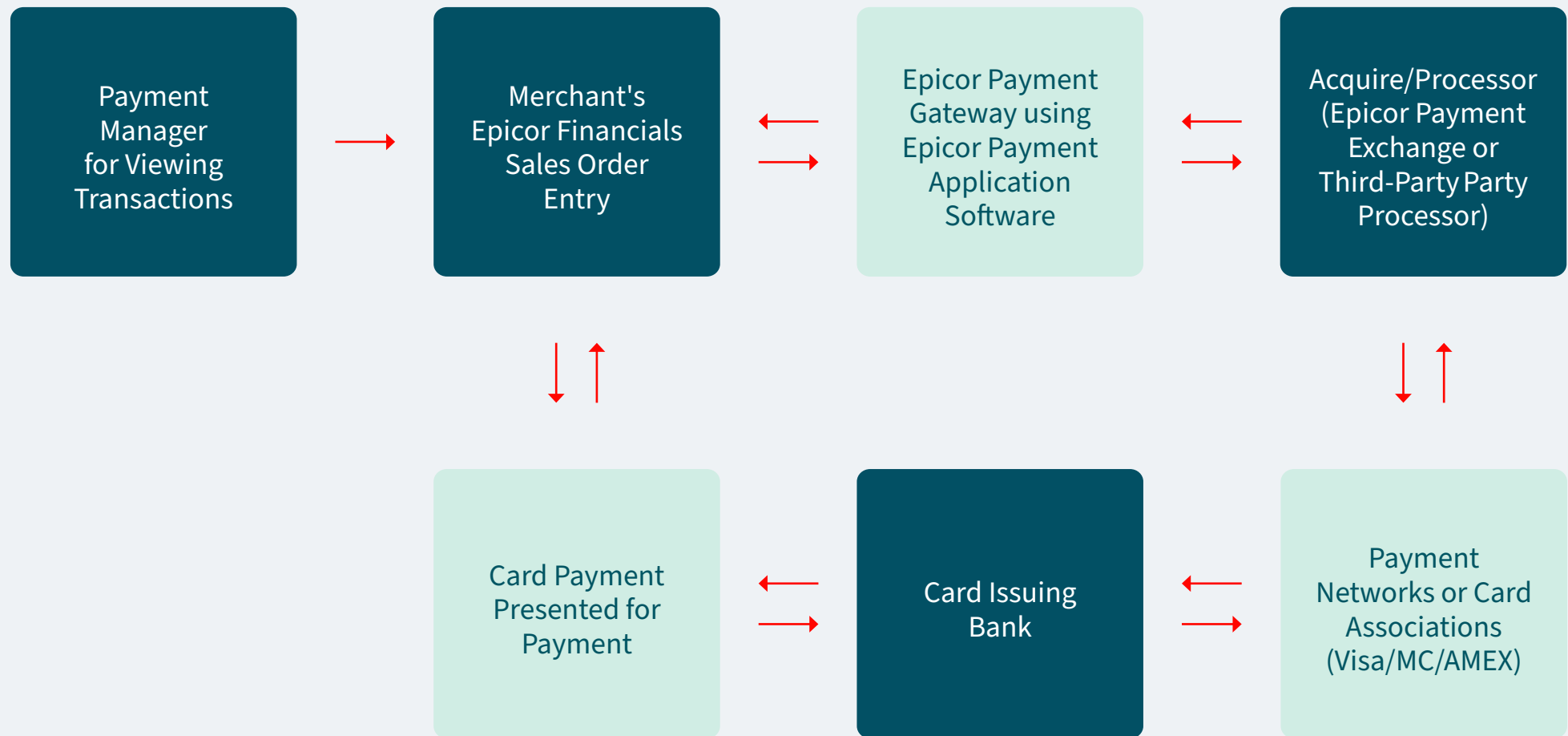
screens, tabs, switches, and the accompanying functionality are seamlessly added to the existing, standard behavior. CSF packages usually contain locally required human-readable reports, electronic reports, declarations, statements, electronic invoicing solutions, payment instruments, third-party interfaces, tax handling logics, forms, and validation or certification routines. Key benefits of the CSF package include:

- Add-on local capabilities built on top of standard functionality in any application program where required
- Consistent local language, look, and feel throughout the application
- Same release cadence as Epicor Financials
- Quick and easy implementation
- Reduced end-user training and total cost of ownership
- Legally required electronic reports
- Electronic invoicing solutions
- Digital signature and transactional certification
- Integration with third-party providers or live connection to authorities where necessary
- Access to expertise of partner development ecosystem
- Application language included





## Simplified Credit Card Transaction Flow



## Epicor Payment Exchange

The Epicor Payment Exchange gives access to several components that cover credit card processing needs, available directly with Epicor Financials.

These components are:

- Epicor Payment Application
- Epicor Payment Gateway
- Epicor Payment Exchange

The Epicor Payment Application offers a service that receives transaction information from Epicor Financials; it then sends the request to the Epicor Payment Gateway.

The Epicor Payment Gateway service connects to the credit card processing network in the cloud and transmits the requests of a credit card payment transaction to the gateway. Epicor Payment Exchange connects to full merchant services and credit processing businesses to perform credit card authorization, settlement, and reporting, as well as credit, debit, and PIN debit operations. American Express and Discover cards are supported and it is PCI-Compliant. Epicor Payment Exchange is fully integrated with Epicor Financials and offers higher security, easier compliance, daily batch reconciliation, and streamlined processes.

Epicor Payment Application combined with the Epicor Payment Gateway stores all of the credit card data encrypted securely in the cloud; therefore the Payment Card Industry Data Security Standard (PCI DSS) scope for the users is reduced.

The Kinetic environment does not store cardholder data, only tokens returned from the Payment Gateway, reducing overall PCI scope.

For processing transactions in Canada, Australia, and New Zealand, the Epicor Payment Gateway connects with PayFlow Pro (PayPal). The Epicor Payment Exchange service is only available to U.S. and Canada customers.

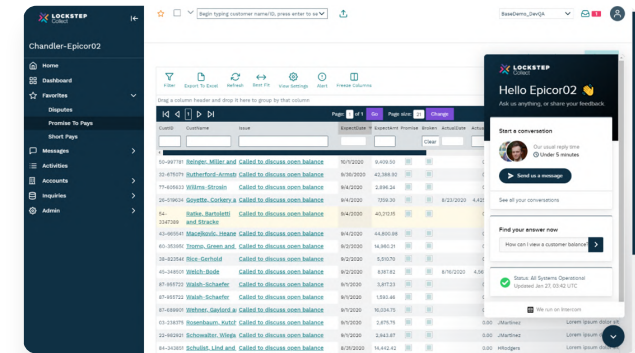
## Credit and Collections

Accounts Receivable is one of the largest assets of any company, and it's typically one of its most fluid. Most businesses, however, have to write off four percent of this asset every year. This is a substantial cost to the business that can be greatly reduced with better management.

Take control of your outstanding receivables and reduce days sales outstanding (DSO) through automated AR management with Epicor Cash Collect.

Complete functionality includes:

- Workflow-based collection management
- Centralized activities
- Collection templates
- Automated calls, texts, emails
- Customer self-service portal
- Team management and reporting
- Projected cash receipts
- Multi-currency and multi-company



*Epicor Cash Collect is a fully cloud-based product offering efficient automation for your credit collection processes. The Next Best Action pane saves precious hours for credit managers. Transcribe calls to searchable texts, make automated calls. Chat with product support agents directly from within the product.*



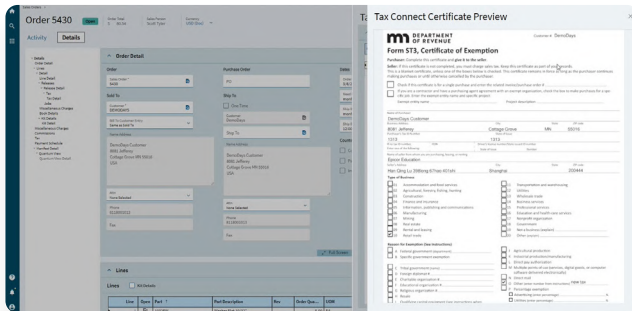


## Epicor Rebates

The optional Epicor Rebates module provides you with a way to enter, update, and review any rebate program that your company runs with your customers. Use this module to define the active rebate programs for your company, generate rebate transactions, and pay rebate amounts to your customers through either an invoice check or a credit memo.

Complete functionality includes:

- Rebate transaction process generation
- Get rebates
- Rebate-to-AP invoices/memo
- Rebate contract entry
- Rebate transaction adjustment
- Tracker programs



*Upload, store, and retrieve tax-exempt certificates in Epicor Financials with Epicor Tax Connect Cert Capture.*

## Tax Automation

Collecting and remitting sales and use tax is a government-required, compulsory activity. It doesn't drive revenue, and it doesn't reduce expenses, so any time or money spent on tax compliance is—by nature—nonprofitable. There are more than 16,000 United States and Canadian tax jurisdictions alone, and the rates, rules, and boundaries change relentlessly. Keeping up with all of the tax changes is an operational distraction and a drag on the efficiency of your organization. Epicor Tax Connect gives you the option of determining sales taxes automatically based on the origin and destination of the sales transaction. It integrates to a constantly updated, comprehensive, online database of tax rules where each tax transaction can also be stored for historical and reporting purposes.

Epicor Tax Connect Global helps to determine sales tax in international business relations. Transactions in all directions between the United States and the European Union member states can take the advantage of tax determination, thus making business easier and making tax compliance less stressful. Epicor Tax Connect Global also runs in a number of other geographies. Manufacturers are often exempt from sales taxes as they sell to certain types of entities, such as governmental bodies, non-profit organizations, or retailers. In specific cases, manufacturers need to prove the exemption by storing tax-exempt certificates for each sales transaction. Kinetic allows you to upload, store, and retrieve tax-exempt certificates from the Avalara CertCapture service directly within your system when entering a customer or sales orders.

## Asset Management

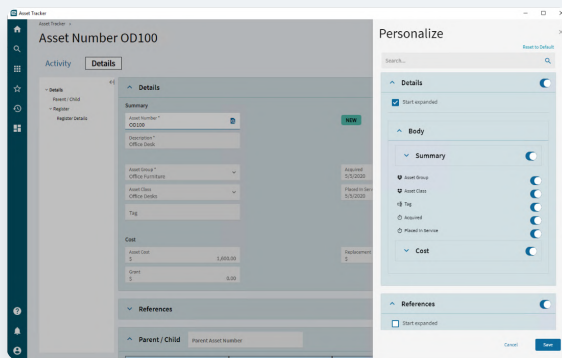
Asset Management helps you record, track, and depreciate your fixed assets for optimal utilization. Asset Management also automates the tracking and management of the asset throughout its useful life—from acquisition to disposition. Using a unified source of asset data, standard asset management tasks—such as asset transfers, disposals, reclassifications, and adjustments—can be streamlined. Complete Asset Management functionality includes:

- Mass maintenance management
- Asset registers
- Asset valuations
- Asset relationships
- Maintenance
- Multicurrency management
- Asset depreciation methods
- Asset integrations
- Grants
- Asset locations
- Asset import
- Retroactive adjustments

## ADP Workforce Now Integration

Having a sound and accurate process to submit payroll to your ADP Workforce Now payroll solution is extremely helpful when meeting critical payroll deadlines. With the Epicor ADP Payroll Integration, you have the ability to set up employee pay groups, calculate and edit payable hours, and produce a file pre-formatted and ready for submission to ADP. Epicor Financials is integrated with the ADP payroll solution and can also be integrated to third party payroll providers. The Epicor Payroll module is available as an optional module within Epicor Financials. The Payroll module can work with the Automated Clearing House (ACH) payment capability as well as the General Ledger (GL).

- Reduces staff hours needed to process payroll
- Automatically generates submission-ready file format
- Improves productivity in processing payroll • Helps to meet critical payroll deadlines



*The Asset Tracker program shows all the necessary information you need on a fixed asset. Personalize the screen as you like and hide fields you do not use in your business process.*



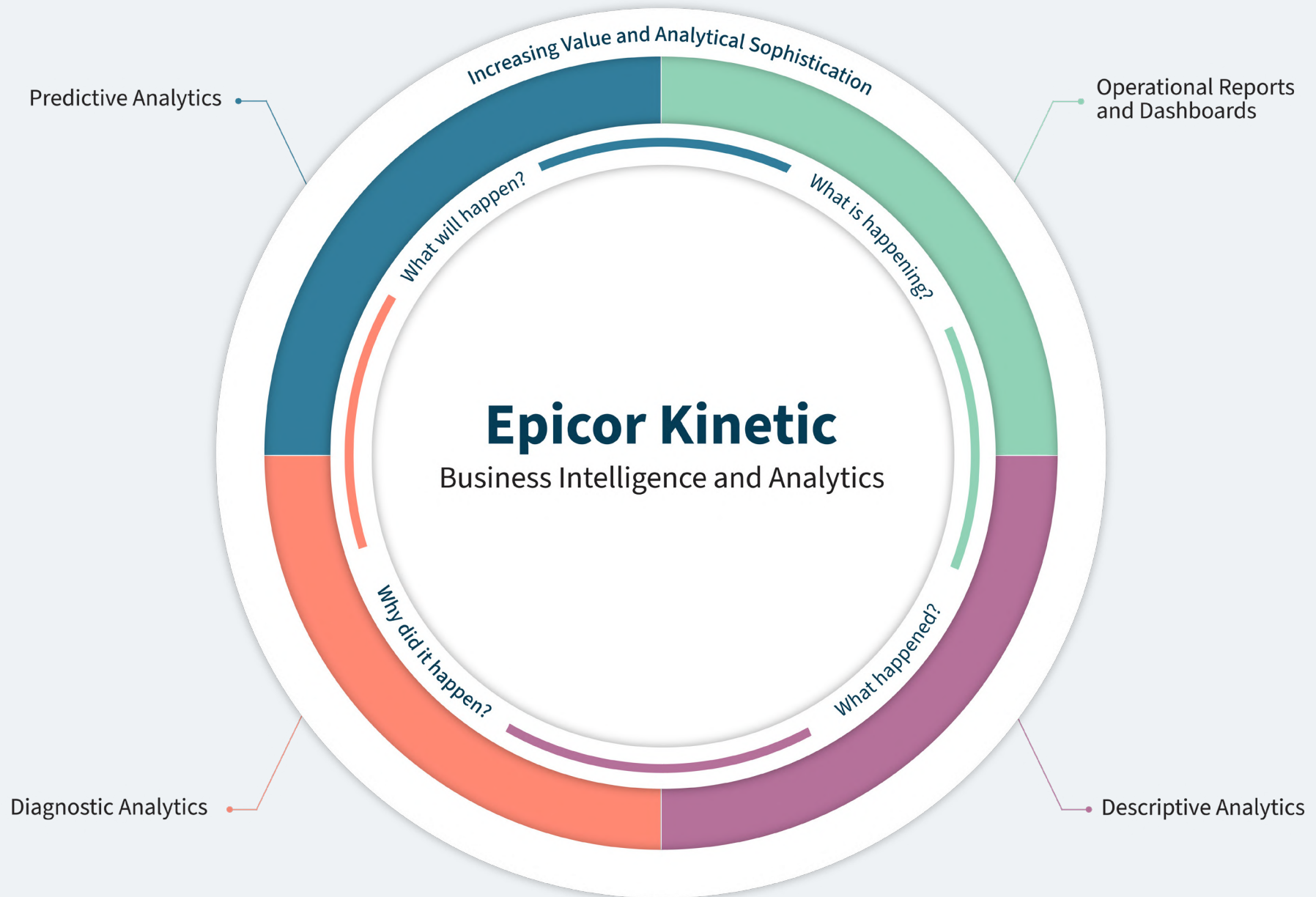
## ○ Business Intelligence and Analytics

Business Intelligence and Analytics for Kinetic help you answer four essential questions—what happened, why did it happen, what is happening now, and what will happen next? Dashboards, trackers, and data visualization tools built into the core Kinetic platform help you get a better understanding of what is happening in your company right now. Additional modules also provide you with deeper trending, diagnostic, and predictive analytics to bring the future into focus.

- Operational Reports/ Dashboards
- Descriptive Analytics (Business and Financial User Reporting/ Dashboards)
- Diagnostic Analytics (Scorecards/ KPIs, Financial Planning)
- Predictive Analytics (Forecasting)









## Predictive Analytics

Epicor Smart Inventory Planning and Optimization Platform  
*Epicor Smart Demand Planner*  
*Epicor Smart Inventory Optimization*  
*Epicor Smart Operational Analytics (for inventory)*  
● ◆ Smart Forecasts

## Diagnostic Analytics

● ● ◆ Epicor FP&A  
*Reporting, Budgeting, Collaboration, Consolidation, and BAQ connection*  
● ◆ Epicor Data Analytics  
*Includes Advanced MES Analytics*  
● ● ◆ Epicor Data Analytics Financials  
*Epicor Data Analytics Financial Statements*  
*Epicor Data Analytics Budgeting and Forecasting*

## Operational Reports and Dashboards

● ◆ Epicor Advanced MES  
● ◆ Epicor IoT  
● ● ◆ Business Activity Queries (BAQs)\*  
● ● ◆ Microsoft SQL Server  
● ● ◆ Reporting Services (SSRS)  
● ● ◆ Executive Dashboard  
● ● ◆ Epicor Data Discovery (Standard)\*  
*Epicor Data Discovery IoT Visualization*

## Descriptive Analytics

● ◆ Grow  
*Includes BAQ connection*  
● ● ◆ Spreadsheet Server

## Deployment Choices

● Cloud  
● On Premises

## Data Sources

◆ Epicor Financials Live data  
◆ Data Mart  
◆ Data Warehouse

\*Included with Epicor Financials core packages

## Operational Reports and Dashboards

To gain insight into everything currently happening enterprise-wide, look to the operational reports and dashboards available in every area of the Kinetic system. It all starts with Business Activity Queries—SQL queries throughout the Kinetic system made with a visual drag-and-drop wizard. The dashboards provided with Epicor Advanced MES also keep you up to date with what is happening with your machines on the production floor.

- The complete list of operational reports and dashboards features:
- Kinetic Business Activity Queries
- Microsoft SQL Server Reporting Services
- Kinetic Trackers and Dashboards
- Epicor Advanced MES

## Business Activity Queries

Every business needs an intuitive and easy-to-use query engine, which is why Epicor added Business Activity Query (BAQ) in the core platform of the Kinetic system—allowing you to create your own or adapt over 800 standard SQL queries. Once created, queries can be used throughout the application to generate SSRS reports for quick searches, view results in a BAQ grid or Epicor Data Discovery view, and much more. Complete functionality includes:

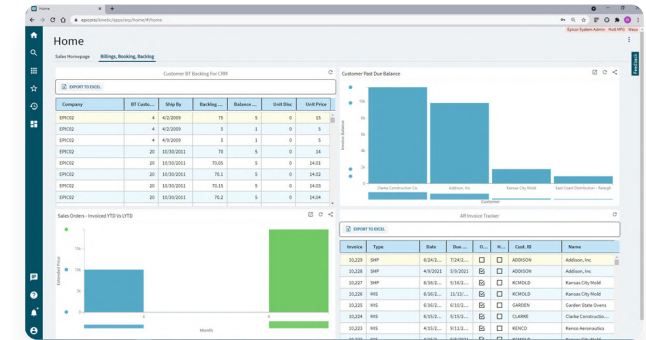
- BAQ design wizards
- Graphical table links
- Embedded calculations
- Multiple data views
- Analyze/test query tabs
- Updatable BAQs
- Configurable dashboard applications
- Ability to use a BAQ as a data source for another BAQ

## Microsoft SQL Server Reporting Services

Microsoft SQL Server Reporting Services (SSRS) underpins the Kinetic system and provides a flexible reporting structure for delivering professional reports and analysis to business stakeholders in a format that business users can easily consume. It is also used with Kinetic Advanced Print Routing for forms printing and routing.

SSRS easily utilizes many types of data and can deliver it in a variety of formats. Because SSRS works with other applications and products in the Microsoft platform—such as Microsoft SharePoint®, Microsoft SQL Server® Analysis Services, Microsoft Office, and Microsoft SQL

Server Report Builder—SSRS is an invaluable tool for improved analysis and decision-making in the enterprise.



*Trackers, Grids, and Charts—Closely manage customer and supplier performance with comprehensive role-based and interactive dashboards that offer a complete picture.*

## Trackers and Dashboards

The Kinetic Home Page permits the combination of multiple widgets for data views, dashboards, and BAQ grids that provide capabilities like inquiries, ad hoc reports, graphical analyses, tactical business intelligence, alerts, and business monitoring. The Kinetic Home Page provides a robust, one-stop interface that replaces traditional menu systems with personalized role or context based views and links into core transactions of the system—including real-time, exception-driven indicator flags. Tooled with unique flexibility, dashboards enable users to develop their own workbenches using a series of online views of information.







From monitoring your employee intranet site, to live access to industry-related websites, each dashboard contains the information you and your employees need to more proactively run your business.

Complete functionality includes:

- Role-based home page
- Real-time, exception-driven management
- Real-time access to up-to-date information
- Drill-down trackers
- User-level personalized components
- Custom component generation
- Personalized functionality
- Open to related functionality
- Fully secured web interface

### **Epicor IoT Data Discovery Widgets**

Epicor IoT is a Kinetic module that integrates with the Microsoft Azure IoT Hub. This application monitors and visualizes data from sensors and other Epicor products. Epicor IoT also gathers context and in-depth production data from the Kinetic system. Users gain intelligent insights into the production and day-to-day enterprise activities—achieving deep levels of operational efficiency. The Epicor IoT Data Discovery widgets added to the Kinetic Home Page alert decision-makers in real time to what needs attention on the shop floor, improving productivity.

Each machine or device sensor can be set up with a Key Performance Indicator (KPI) setting, such as allowable temperature ranges.

### **Descriptive Analytics**

Let every department learn from its data with self-service summaries, animated and interactive data visualization, and tools to simplify report creation and sharing. Products that fit this category support analyzing larger amounts of data for short-term and historical trending analysis, with some diagnostic capabilities.

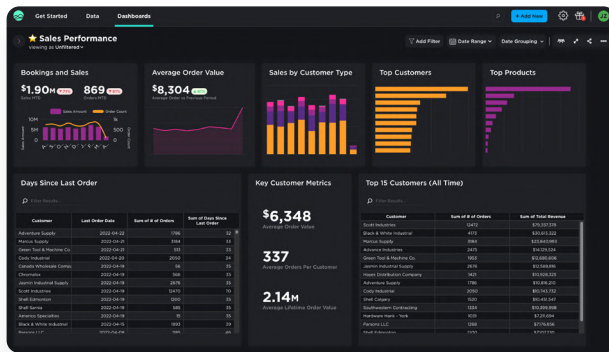
### **Grow, An Epicor Solution for Business Intelligence**

Grow is an all-in-one business intelligence solution that gives the Citizen Analyst everything they need to connect, blend, cleanse, filter, and store their data and visualize it in dashboards and reports. With Grow, Epicor embeds a more open and connected SaaS-first BI into into the Kinetic Public Cloud platform.

The 75+ Data Connectors to popular Cloud apps and other applications and databases give Kinetic users the freedom to start connecting to their data right away, without waiting for company-wide implementation projects. The unlimited Grow user license gives more employees access to the actionable insights they need to make decisions, without waiting for help from IT or a business analyst.

And Grow caters to all user levels: Low-code SQL coding for your technical staff and the ability to do No-code transforms for the non-programmers. Grow is also available for onpremises installs of Kinetic.

Grow provides a full stack of all necessary components for a complete BI solution:



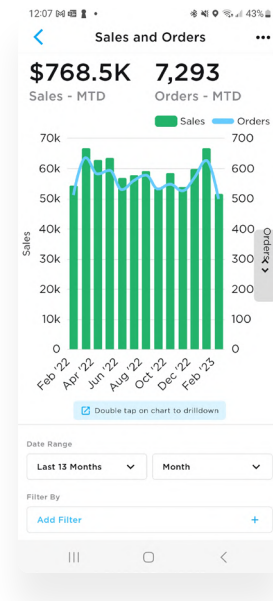
*Grow Business Intelligence—Empower everyone to make decisions and measure results against goals with easy-to-understand Kinetic metrics.*

- **Extract Transform and Load (ETL)**—Grow makes it easy to prepare, cleanse, and transform data across multiple data sources to fuel powerful metrics and dashboards.
- **Data Warehouse**—Grow imports your business-critical data and keeps the most relevant and current data on hand, so you don't need a third-party data warehouse.
- **Data Visualization**—Easily marry and transform disparate data sources to build metrics and dashboards in minutes, and then filter, slice, and explore different visualizations as you navigate your data to find the best way to surface insights for your business.

Grow also includes all currently available Kinetic content packs, and you can easily augment them with BAQ data, any other Kinetic data fields, user defined fields or other data sources like historical databases or spreadsheets.

These content packs include:

- Sales
- Material
- Financial
- Epicor Field Service
- Maintenance Management



*Grow—iOS and Android apps provide actionable insights to workers on the move.*

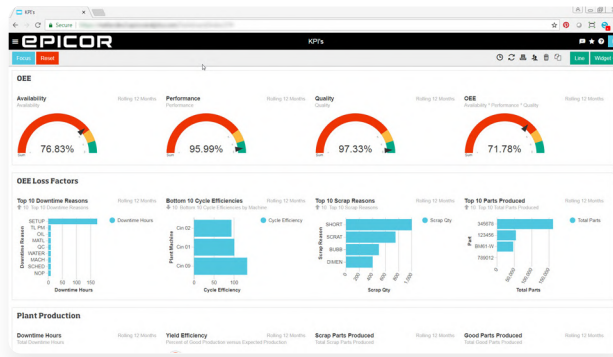
## Epicor Data Discovery

Epicor Data Discovery is a data visualization tool for the Kinetic system. Staff can use their natural visual abilities to quickly spot areas of interest in real-time production data that they might have otherwise missed by just looking at rows and columns of numbers. In the Epicor Data Discovery view, users can set filters and drag-and-drop measures and dimensions to produce rich visualizations—a process similar to manipulating a pivot table in a spreadsheet. They can then focus on a data point or area and drill down into the underlying ERP transactional detail.

They can also combine views to create BI dashboards with shared filters and shared dimensions. Driven by real-time BAQs in the Kinetic system, Epicor Data Discovery visualizes short-term, up-to-the-second enterprise data. Epicor Data Discovery is accessible via Kinetic Desktop Client, web browsers, tablets, and modern smartphones. The application is designed to work just as well on low-powered touch devices as it does on a powerful desktop with large amounts of screen real estate. Epicor Data Discovery automatically adjusts its layout and behavior to the browser and device currently accessing it. Resizable data cards can be animated to cycle through multiple values like a stock ticker, providing a live feed of production data for applications such as Kinetic Home Page.

## Diagnostic Analytics

Analyze long-term, aggregated data to quickly and easily discover why certain product outcomes happened and perform what-if analysis with diagnostic analytics.



*Epicor Data Analytics Content for Epicor Advanced MES—Discover trends in long-term production data.*

## Epicor Data Analytics

Epicor Data Analytics helps companies turn their data stored in on-premises deployments of Kinetic into actionable insights. Epicor Data Analytics is an easy-to-use service in the cloud that takes a unique, intuitive approach to lead you on a journey of discovery through large-cubed data sets contained in your data warehouse. With deeper insights, companies can grow by reducing cost, identifying new opportunities, supporting specific programs, and speeding up decision-making.

Epicor Data Analytics provides customizable and interactive dashboards to make it easy to analyze the data inside your business systems. The dashboards contain visual KPIs, graphs, charts, and tables, so you can quickly review important information about your business performance and make informed strategic decisions. Once you have spotted an area of interest

in the visual metrics, the Epicor Data Analytics grid is where you conduct most of your analysis, and unlike a spreadsheet, you can “drill down” into the data with a simple click to reveal additional levels of detail—all the way down to the Kinetic transactions—and find your answers. Epicor Data Analytics includes all currently available Kinetic and Epicor Advanced MES content packs. You can also augment them with any other Kinetic data fields, user-defined fields, or other data sources like historical databases or spreadsheets.

These content packs include:

- Sales
- Material
- Financial
- Epicor Field Service
- Maintenance Management
- Epicor Advanced MES

## EDA Advanced MES Dashboards

Epicor Advanced MES collects data directly from equipment and operators on the shop floor in real time, minimizing inaccurate and time-consuming manual data collection. Epicor Advanced MES provides powerful metrics you need to improve performance—including Overall Equipment Effectiveness (OEE), run rates, scrap, yield, energy consumption, material consumption, and much more. Epicor Data Analytics Dashboards take it a step further by aggregating Epicor Advanced MES data with Kinetic data long-term in the Cloud, for trending analysis and diagnostics—find the answers to such questions as why a shipment was late—was it a production problem or a supplier problem?

**Note:** Refer to the “[Production Management](#)” chapter for more information about Epicor Advanced MES.







### Financial Planning and Analysis

Epicor offers multiple products for FP&A, enabling all businesses of different types and sizes to select their best option. Several products in the following list can also be used in other areas of the business.

**Note:** Refer to the “[Financial Management](#)” chapter for more information on these products:

- Epicor FP&A
- Spreadsheet Server

### Predictive Analytics

What will happen next? Plan for success using demand planning and inventory optimization tools in Smart IP&O by Smart Software.

#### Epicor Smart Demand Planner

Epicor Smart Demand Planner provides cloud-based statistical help with forecasting that automatically selects the right forecast model for each item—accounting for trend, seasonality, and promotion- or event-driven demand. Once the baseline forecast is produced, it is available for collaborative review and consensus planning by authorized stakeholders. Forecast accuracy can be measured to help ensure the best possible forecast is delivered to the business at both the aggregate and item mix levels.

#### Smart Inventory Planning and Optimization (IP&O)

Safety stock levels, reorder points, lead times, and order quantity directly influence the service vs. cost relationship. Smart IP&O helps you maintain

the balance between service and cost by providing inventory policy decision support and the means to share, collaborate, and track the impact of your inventory planning policy. Inventory Optimization reconciles holding costs, ordering costs, and stock-out costs in order to prescribe the inventory policy and service levels that yield the total lowest cost.

Users can optionally assign service level constraints and targets and propose multiple policies for consideration. Then, they can share proposed policies and agree on a consensus plan that best meets the company’s objectives.

#### Smart Operational Analytics

Smart Operational Analytics is a native cloud-based reporting platform that provides a fast, easily understood, and up-to-date perspective on the state of your inventory and its performance against critical metrics, actual supplier lead times, and opportunities to rebalance stocks across facilities—helping to uncover root causes of operational inefficiencies. Get a 360-degree view of your inventory to identify value, stocking trends, overstocks, understocks, and potential order cancellations. Also identify root causes of stock outs, excess inventory, and late deliveries.

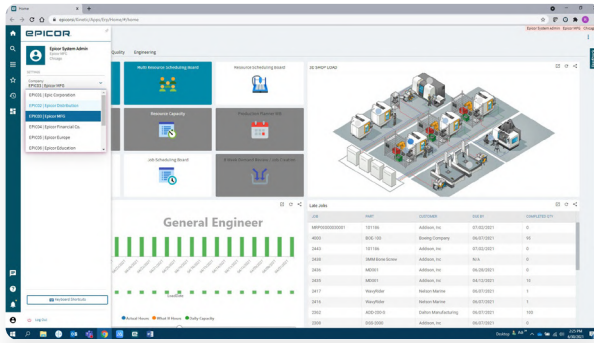


## ○ Global Business Management

Whether through acquisition or organic growth, more and more companies are wrestling with the complexities of managing multiple business entities. Epicor Global Business Management helps ensure that no matter how distributed your organization becomes, you can maximize efficiency and drive business results. To support the needs of today's increasingly distributed businesses, Epicor offers robust global business functionality. You can perform transactional functions between systems and entities, internal and external—including intercompany transactions such as intercompany orders, transfer orders, and shipments between plants and warehouses. Epicor facilitates these scenarios within a single application that is flexible enough to grow with you as you expand your business. Epicor Global Business Management offers organizations the essential tools needed to create and maintain a single version of the truth.

- Multicompany Management
- Multicurrency Management
- Global Multisite Management
- Multilingual Data Management
- Master Data Management
- Scalable Deployment
- Global Engines
- Electronic Reports
- Country-Specific Functionality (CSF)
- Epicor Application Studio





*Epicor Financials works with multiple companies and sites. It is easy to select which company you would like to enter. In the top right corner, you see the company you are logged into as well as the user name.*

## Multicompany Management

Streamline your business with Multicompany Management by consolidating operations such as procurement and accounts payable, and improve operational visibility across companies with advanced tools. Automation and recognition of intercompany financial transactions can optimize enterprise performance to shorten lead times on key product lines. Additionally, from a financial perspective, multicompany organizations may choose to not only report as individual entities, but also to consolidate multiple currencies and report across business entities to a single consolidation company.

Underpinning this functionality is a comprehensive, scalable technology framework to support global enterprises that offers development choice, and includes a set of productivity-enhancing tools designed to support global business operations.

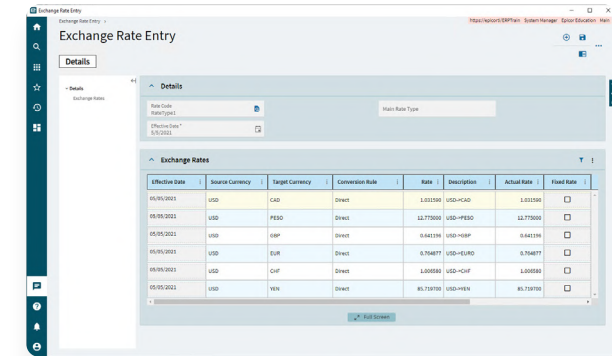
- Easy multicompany navigation
- Global management of customers, parts, and suppliers
- Comprehensive global credit management
- Flexible account management
- Centralized payments
- Consolidated purchasing
- Multicompany consolidation
- Global supplier price agreement
- Multicompany journal entry
- Intercompany trading and eliminations
- Multicompany views and dashboards
- Flexible company hierarchy

## Multicurrency Management

Multicurrency Management automates the process of both buying and selling in foreign currencies, including tracking of default currencies and extensive exchange rate tables. Lock transactions in at a specified rate with automatic gain or loss reporting, reducing the guesswork from handling foreign transactions. Throughout the Epicor system, the currency symbol is displayed to notify the user of the currency being used.

Multicurrency Management functionality includes:

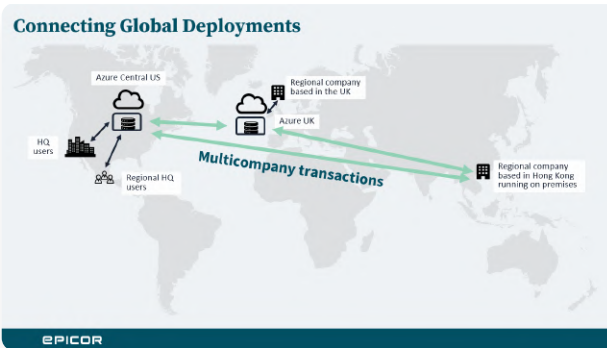
- Revaluation options
- Multiple currency tables
- Updatable exchange rate tables
- Gain/loss reporting
- Base currency reporting
- Flexible currency capabilities including price lists, quotations, orders, service contracts, invoices and vouchers, and cash receipts



*Multiple currencies are supported in Epicor Financials with a daily currency exchange rate. This is especially important when you need to make a periodic revaluation in your books, or if you have currency orders and invoices every day.*







*Epicor Financials supports inter-company transactions in a multi-region and multi-national environment. The transactions can occur among different regional cloud datacenters and databases—the connection works even between cloud and on-premises installations.*

## Global Multisite Management

Supply chains demand synchronization of production with distribution and logistics. This is most effectively accomplished with a single system providing visibility and consolidation of resources in multiple facilities. Companies may also prefer to run business functions centralized with separate production and distribution functions, or they may run them separately with the ability to consolidate financials at month- or quarter-end. Epicor supports both scenarios within Global Multisite Management, providing support for centralized accounting and purchasing, while allowing separation of production and distribution facilities. Manufacturing and distribution organizations can also leverage the planning and scheduling efficiencies with robust multi-plant functionality.

With Multisite Financials, multiple locations (sites) in a single company can be fully separated in the GL accounting, as well as on the subledger transactional level. For example, AP invoices and payments can be assigned and booked to a specific site. There is a built-in security to separate sites from the transaction generation up to the reporting, including 1099 reporting. When generating reports in financial management, it is possible to filter on a specific site. A comprehensive data filtering system ensures data security and integrity, leveraging the Epicor Financials user security setup.

Sharing of master and subledger transactions across different sites is possible. A site can become a legal entity— depending on the decision of the organization. You can also run AP payment proposals on the site level.

The electronic tax reporting in the UK CSF also supports the site based reporting.

Complete functionality includes:

- Sourcing by plant
- Comprehensive production plant visibility
- Virtual plant support
- Shared warehouses
- Costing by plant
- Alternate BOMs and routings per plant
- Multi-plant scheduling functions
- Accounting transactions, manual GL journal entries, invoices, payments, financial reports associated to sites
- Process centralized or decentralized accounting for sites

## Multiple Companies in Different Databases and Regions

Epicor Financials supports a global network of mixed deployments, both on-premises and in the cloud. The business entities in any countries can be implemented separately from each other, even in different regional cloud data centers, but when required, these can interact with each other easily, leveraging the Public Cloud Multi-region Multicompany

Transactions license. This functionality enables intercompany transactions between all your entities globally and helps to centralize certain activities such as streamlining master data management or the AP collections.

- Global parts, customers, suppliers currencies
- Trade goods between internal companies
- Automation on Inter-company sales and POs
- Automation of AP/AR invoices for inter-company trade
- Centralized AP and collections
- Consolidated purchasing
- Multicompany journals/AP allocations
- Multicompany GL accounts and financial book consolidations
- Can be a combination of on-prem or cloud deployments i.e. Cloud to cloud, cloud to on-premises or vice versa
- Multicompany Azure service bus
- Batch synchronization of defined global data and transactions



Country Maintenance

| Description    | ISO Code | Currency Code        | Language              |
|----------------|----------|----------------------|-----------------------|
| Australia      | AU       | United States Dollar |                       |
| Canada         |          | Canadian Dollar      |                       |
| China          |          | United States Dollar |                       |
| France         | FR       | Euro                 | French                |
| Germany        |          | Japanese Yen         |                       |
| India          |          | Indian Rupee         |                       |
| New Zealand    |          | United States Dollar | English New Zealand   |
| Scotland       |          | Great British Pound  |                       |
| Switzerland    |          | Swiss Franc          |                       |
| United Kingdom |          | Great British Pound  |                       |
| USA            |          | United States Dollar | English United States |

*The Country Maintenance application allows you to set up all the countries you do business with. The country codes are applied on business partners such as suppliers or customers; these play a significant role in the Country-Specific Functionality (CSF) packages*

## Multilingual Data Management

Corporate growth and expansion inevitably leads to new markets and new geographies. Multilingual Data Management—alongside the global configurable engines—facilitates this growth with resources that can manage your business wherever you take it, with support for country-specific requirements around tax, currency, and languages. Complete functionality includes Epicor Layered Client Framework, which separates the language of the business logic from the language of the end-user interface, so your organization can operate seamlessly.

## Master Data Management

The recent emphasis on regulatory compliance, the advent of service-oriented architecture (SOA), and

mergers and acquisitions has made the creation, stewardship, and maintenance of accurate and complete master data a business imperative.

MDM can help ensure that your multicompany and multisite data meets regulatory requirements and also provides the consistency needed for real-time distributed operations—leading to greater customer satisfaction, improved operational efficiency, and enhanced business performance.

## Scalable Deployment

Multisite organizations need flexibility to deploy optimally at each location, maintaining uptime, and keeping costs low. Epicor Financials lets you deploy your companies or locations together in a single cloud or on-premises instance. Or you can leverage the multisite architecture to disperse the deployment with each location on a separate regional cloud or on-premises instance, with multiple databases and multiple servers.

The business can gain a consolidated view of multicompany transactions without needing all to run out of a single Cloud database in a single Azure datacenter. With the Multi-region Multicompany Transactions, you gain new freedom to connect inter-company transactions such as purchasing, sales orders, and reporting across multiple Epicor Financials instances. These instances, or databases, can serve any number of company locations, in the cloud or on premises, so you can roll out a cloud strategy in phases, meet local requirements, and improve global visibility and alignment.

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 site downtime.

- Multiple companies within a single database
- Single server with multiple databases
- Multiple servers with single or multiple databases
- Communication across databases and servers in all directions

## Robust, Flexible Global Engines

Epicor Financials gives you extensible functionality and flexible options that can help you minimize your organization's exposure to regulatory changes and mandates that can subject your business to financial penalties that adversely affect corporate credibility and compromise brand reputation.

With a series of interlocking global engines, you can easily configure the rules that determine how transactions are posted, where they are posted how tax is calculated, how currency is handled, and how data is stored.

These global engines include tax, currency, rounding, legal, posting, electronic reporting, and book engines.

## Electronic Reports

If your business needs to generate an electronic report from the Epicor Financials system, the Electronic Reports module is a great solution that allows experts to deliver data report files in diverse formats such as XML, JSON, PDF and more. Electronic Reports features the user-friendly query editor solution Business Activity Query (BAQ) designer that every user has access to and which allows any user to generate data queries easily with filters, conditions, and summaries.

The data source can be any areas of your system, but this module is mostly used for financial data reporting such as GL transactions, Chart of Accounts, balances, electronic VAT reports, and invoice transactions.

Third party organizations often require financial data in electronic format, such as customers, suppliers, auditing firms, analysts, advisory companies, banks, investors, or authorities.

Publicly traded companies are obliged to file their financial statements, quarterly reports and many forms to the Electronic Data Gathering, Analysis, and Retrieval (EDGAR) system used at the U.S. Securities and Exchange Commission (SEC).

Electronic Reports also support electronic invoicing and digital signature solutions. CSF packages also use this module to provide digital report files required by local legislations across the globe. Epicor Electronic Reports helps your company do business globally.

Example application areas:

- Compliance/audit reports
- Electronic financial statements in International Standards (US-GAAP, IFRS etc.)
- SAF-T reports
- Tax return filings
- Electronic documents
- Electronic sales/purchase orders
- Electronic ledgers
- Electronic invoicing
- Bank payment files in XML format
- EDI transfers

## Country-Specific Functionality

When expanding your business to new regions or countries, the CSF packages provide access to a range of functionality required either by law, by a specific industry, or by a widely used local process. The CSF packages are developed, tested, and included with each Kinetic release, ensuring a seamless experience for any users in the given country.

The CSF packages can be purchased separately for each country; these contain detailed documentation on the configuration of the add-on functionality included.

The user adoption and learning cycle of a CSF package triggers minimal effort, because the interface looks exactly the same as Kinetic. New application screens, tabs, switches and the accompanying functionality are seamlessly added to the existing, standard Kinetic behavior.



Typically CSF packages also contain locally required, human-readable reports, electronic reports, declarations, statements, electronic invoicing solutions, payment instruments, third party interfaces, tax handling logics, forms, validation or certification routines. Key features of CSF packages include:

- Add-on local capabilities built on top of standard Kinetic functionality in any application program where required
- Consistent local language, look, and feel throughout the application
- Quick and easy implementation
- Reduced end-user training and total cost of ownership
- Legally required electronic reports
- Electronic invoicing solutions
- Digital signature and transactional certification
- Integration with third-party providers or live connection to authorities where necessary
- Access to expertise of partner development ecosystem
- Application language

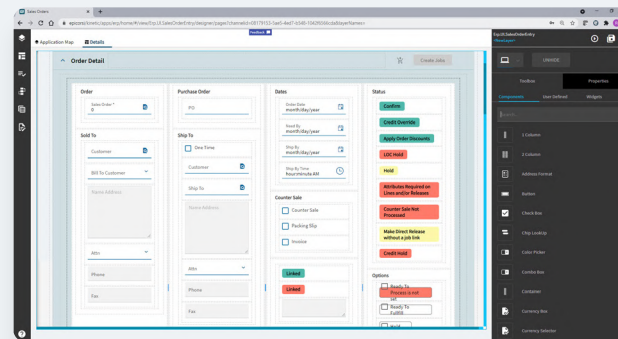
## Application Studio

When your local business needs to adjust the corporate processes, Application Studio is a great way of configuring the user interface so that all users can perform their everyday tasks the way they need to.

Because multinational companies have to deal with unique business process requirements for different countries, they can benefit from leveraging common capabilities across all their sites without having to re-configure everything from scratch. Application

Studio enables a setup where you can combine several configurations for different sites, countries, or user roles without needing to rebuild the functionality multiple times. Save time by syncing your customizations across the business while you can still fine-tune at an individual level. Application Studio takes a best practice approach to system configuration. It takes out the complexity of changing code, as configuration is done in a low-code/no-code environment. Protect your investment by staying current, as the configurations done with Application Studio are easier to upgrade, secure, and cloud-friendly.

A good example of configuring the application to fit your global business operation is to modify the currency entry application.



*No-code/low-code configurations provide flexible solutions to help you stay ahead.*

# Epicor Financials CSF Worldwide Coverage

## 37 Country-Specific Functionality (CSF) packages offered:

In many countries, the ERP base capabilities suffice without a CSF package.

13 Epicor CSF + Epicor PS (Direct)

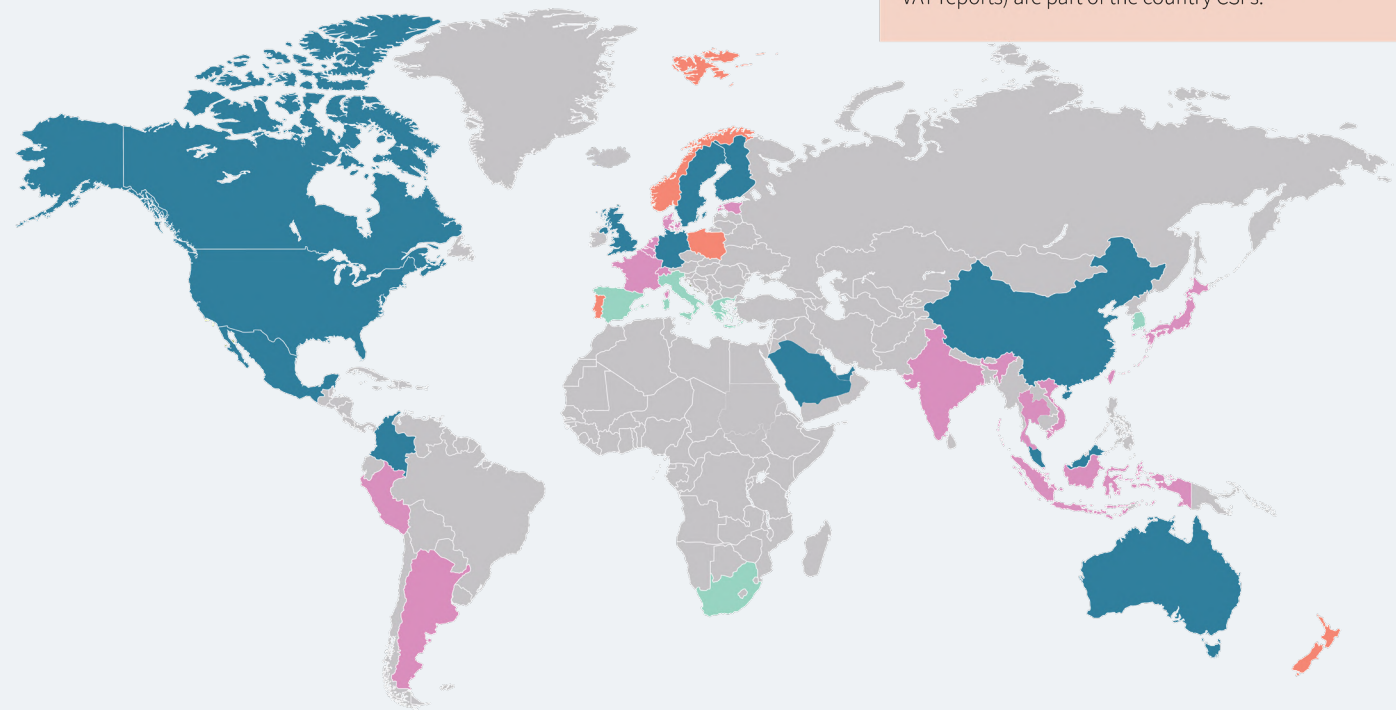
15 Epicor CSF + Epicor PS (Indirect)

4 CSF DEV Partner + Partner PS (Indirect)

5 Partner owned solution + Partner PS (Indirect)

Global Business Management includes powerful engines for tax, currency, rounding, posting, language, and includes multisite, multicompany, multicurrency management, CSF packages, and Epicor Electronic Reports.

Languages available include Arabic, Chinese (Simplified), Chinese (Traditional), Danish, Dutch, English (Australian), English (New Zealand), English (UK), English (US), Estonian, Finnish, French, French (Canadian), German, Indonesian, Italian, Japanese, Korean, Norwegian, Polish, Spanish (Latin), Swedish, Thai, and Vietnamese.



European Union-specific requirements (SEPA, Intrastat, VAT reports) are part of the country CSFs.

### AMERICAS

- ◆ Argentina
- ◆ Canada
- ◆ Colombia
- ◆ Mexico
- ◆ Peru
- ◆ USA

### EMEA

- ◆ Belgium
- ◆ Denmark
- ◆ Estonia
- ◆ Finland
- ◆ France
- ◆ Germany
- ◆ Greece

- ◆ Italy
- ◆ Netherlands
- ◆ Norway
- ◆ Poland
- ◆ Portugal
- ◆ South Africa
- ◆ Saudi Arabia

- ◆ Spain
- ◆ Sweden
- ◆ Switzerland
- ◆ UAE
- ◆ UK

### APAC

- ◆ Australia
- ◆ China
- ◆ India
- ◆ Indonesia
- ◆ Japan
- ◆ Malaysia
- ◆ New Zealand
- ◆ Singapore
- ◆ South Korea
- ◆ Taiwan
- ◆ Thailand
- ◆ Vietnam



## ○ Governance, Risk, and Compliance

Effective Governance, Risk, and Compliance (GRC) initiatives help companies and their employees stay compliant and help ensure that employees and partners at all levels of the organization are aware of the associated risks of non-compliance. GRC can touch every person and every function in an organization in some way. Whether GRC becomes an intolerable burden that increases company overhead or an enabler of efficiency and success depends upon its actual, day-to-day impact on the employees' work, and whether that impact is enabling or debilitating.

- Corporate Governance
- Risk Management
- Security Management
- Business Process Management (BPM)
- Global Trade Compliance
- Electronic Reports
- Environmental and Energy Management



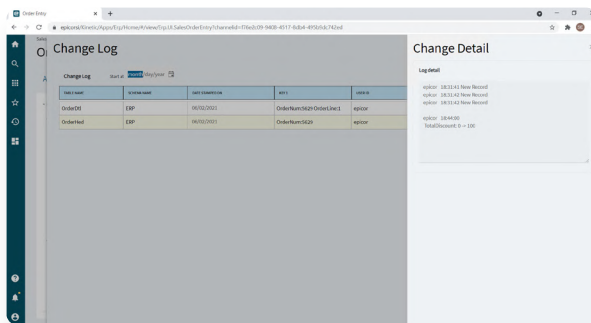


## Corporate Governance

Organizations are under increased pressure to file accurate financial results in a timely manner. Epicor GRC can help organizations meet these shortened deadlines in a variety of ways—from consolidating financial information, to providing drill-down and drill-across access from financial reports, to transactional details. Ultimately, when companies adequately report, plan, budget, forecast, and periodically review and update budgets and forecasts, they exhibit a more mature level of internal control. Integrated enterprise software applications go a long way in helping organizations document their internal controls, remove manual processes, and achieve greater visibility into their financial data.

Complete Corporate Governance functionality includes:

- Epicor FP&A
- Epicor Data Analytics
- Spreadsheet Server



*Risk Management automatically track changes with risk mitigation tools, such as table and field level audit capabilities.*

## Risk Management

ERP systems control the majority of corporate information that could potentially be at risk from piracy, fraud, and sabotage concerns. The only way to truly manage and mitigate risk across the organization is to have a fully integrated, end-to-end solution providing a single, verifiable set of financial and operational metrics. Epicor GRC provides an integrated enterprise solution with built-in, application-level risk mitigation tools and BPM to audit trails and secure workflow automation—key elements of data integrity and security. It also incorporates the ability to infuse business insight through Epicor Business Intelligence and Analytics, as well as allowing organizations to embrace data governance and data protection strategies, help control risk, and handle regulatory compliance.

## Security Management

Epicor GRC provides comprehensive user and group security to restrict data and application accessibility as needed. Security can be granted at user and group levels for all security objects including forms, fields, reports, menus, and method calls. Windows Single Sign-On is only supported on-premises.

Complete functionality includes:

- Product security
- Application security
- Access security
- Business security
- Automated change logs
- Audit logs
- Credit card authorization and encryption

## Business Process Management (BPM)

BPM, Functions, and Automation Studio, used singly or in combination, support the ability to identify and mitigate risks to your organization through business-defined workflow, identifying and improving processes to make your business more efficient, more disciplined, and better able to adapt to change.

Together, they provide a framework for building GRC process-driven integration points that give companies seamless integration capabilities with other applications and businesses.

This framework also automates delivery of information to employees in your organization who are responsible for managing and monitoring internal controls. Complete functionality includes the ability to build and execute activity workflows and robotic process automations (RPAs) throughout the system for your unique business rules. Invoke an eSignature on important business processes to maintain a secure audit trail for reporting and regulatory compliance.

**Note:** Refer to the [“Cloud Business Platform”](#) chapter for more information.

## Global Trade Compliance

In order to conduct business globally, you need enterprise business software that enables compliance with local laws, satisfies international security measures, and meets the myriad local and regional documentation requirements. Epicor Global Trade Compliance applications provide a comprehensive platform for managing these trade compliance necessities.

Complete functionality includes:

- Global trade standards—items
- Landed cost management
- Country of origin tracking
- RoHS/WEEE compliance
- Product lifecycle management
- International shipping and documentation
- Quality management
- Audit trail visibility
- ISO, automotive (TS), aerospace (AS), and FDA (cGMP, FDA 21 CFR Part 11) support

## Electronic Reports

Reporting legislation is constantly evolving, and many tax authorities around the world are now starting to require comprehensive data submissions on a regular basis.

Companies are increasingly expected to provide tax authorities with real-time visibility into all transactions, on top of existing requirements for regular submissions. A growing number of countries either have adopted or are planning to adopt tax reporting—such as Standard Audit File for Tax (SAF-T)—and others are introducing new e-invoicing requirements.

To help you meet these new and evolving requirements in a timely and efficient way, the Electronic Reports can help you facilitate ongoing management of your electronic reporting and compliance requirements. Using this, you can create or adjust custom electronic reporting or e-invoicing solutions in a timely manner.

## Environmental and Energy Management

As the world continues to analyze energy availability, businesses are also turning their attention to areas of opportunity—reduction of carbon emissions, energy conservation, and supply chain sustainability. Companies will look to IT and software solutions to help them find opportunities to extend the tangible benefits of Corporate Social Responsibility (CSR) through the extended supply chain. Some of the more notable areas that corporations are emphasizing when deciding on a path to good environmental and energy management include strategic sourcing and procurement, logistics, application of lean principles, and virtualization.

### Energy Monitoring

Energy Monitoring from Epicor Advanced MES is a real-time, web-based application to monitor and analyze energy use in the manufacturing plant. This can help businesses reduce energy consumption and pinpoint energy savings opportunities right at the source—by monitoring energy use on equipment. Energy Monitoring analyzes load patterns, production requirements, and resource energy demands, giving you the power to reduce peak demand and capture energy savings. You can easily capture and analyze energy performance indicators (EPIs), reducing consumption and lowering costs.

## Manufacturing Sustainability

Sustainable manufacturing is the creation of manufactured products through economically sound processes that minimize negative environmental impacts while conserving energy and natural resources.

Epicor Kinetic can help manage sustainable manufacturing by streamlining and automating processes to make the most of existing resources and by enabling better visibility and control over your supply chain. In addition, Kinetic provides a centralized platform for collecting, storing, and analyzing data from various business processes. The system also facilitates environmental compliance by automating monitoring, reporting, and documentation processes to help you ensure compliance with environmental regulations and standards.





## ○ Cloud Business Platform

Kinetic empowers you with a scalable, cloud solution with a focus on agility; this help you adapt to the changing business climate, while maintaining the peace of mind that your critical business systems are secure and will be ready when you need them. The solution supplies pragmatic innovation on a regular basis to keep your business up to date with the latest industry functionality, keeping you highly competitive. Enable every employee, regardless of tenure or experience, with an easy-to-use, intuitive, cloud-based user experience and embedded learning guides.

Made with manufacturers, for manufacturers, Kinetic combines deep industry capabilities, great user experiences expected by today's workforce, and innovative technology to help you grow.

- Improved Employee Experience Drives New Levels of Efficiency
- Innovative Tools Boost Greater Productivity
- Align Greater Fit to Business Needs With Configuration and Integration Technologies
- Pivot Easily to Meet Demands With Flexible Cloud Solutions and Deployment Choice
- Secure Critical Business Systems With Reduced Effort





The platform technology underpinning the Kinetic application is based on a service-based Microsoft .Net architecture, optimized on Microsoft SQL and standardized on Microsoft Azure. It delivers the latest technology advancements requested by manufacturers including cloud, IoT, and AI/ML. Kinetic delivers a continued partnership in innovation to future-proof your ERP investment.

The Kinetic platform promotes efficiency as it helps our customers to both use and enhance Epicor applications at a business level, rather than a technology level. Businesses can start with the building blocks: business process optimization from our Epicor BPM and Epicor Functions solutions, and technology such as Kinetic RESTful service APIs to extend to other applications in an upgrade-resilient and secure way. Or they can enable more Citizen Integrators across departments with Epicor Automation Studio, an iPaaS (integration Platform as a Service) with workflows and automations that will speed their digital transformation.

The capabilities of the Kinetic Platform include:

- Scalable, service-based architecture
- Mobile, browser-based user experience
- Epicor Virtual Agent
- Epicor Learning
- Epicor BPM and Epicor Functions
- Integration readiness with RESTful service APIs
- Epicor Automation Studio for integration-led automations
- Purpose-built IoT applications
- Epicor Application Studio configuration
- Deployment flexibility, cloud or on-premises
- Connected people, systems, and processes
- Secure cloud solutions for your business





*Evolve your business technology to meet the needs of today's workers.*



## Improved Employee Experience Drives New Levels of Efficiency

### User Experience

The way we work and interact with technology is constantly evolving to meet the needs of new generations of workers. The challenge for many is attracting this workforce, and worker experience plays a strategic role in this effort. Employees expect a consumer-grade experience at work with modern and intuitive applications that boost productivity and simplify everyday tasks. Cloud mobility is also a key aspect. No matter if they are working from home or walking through the shop floor, workers need to have access to their applications through the device and browser of their choice.

Kinetic offers a mobile, browser-based user experience that enables employees to complete tasks in less time while optimizing their personal workflows.

The Kinetic users experience gives you a user experience that is:

- Made for use anywhere, browser-based in the cloud, on any device with a consistent experience
- Made for personal use with guided workflow, easy tailoring, and the ability to connect digitally
- Made for efficiency and greater productivity with a simple, easy-to-use interface that offers industry-focused features and leverages cognitive technologies for greater automation

### Personalization

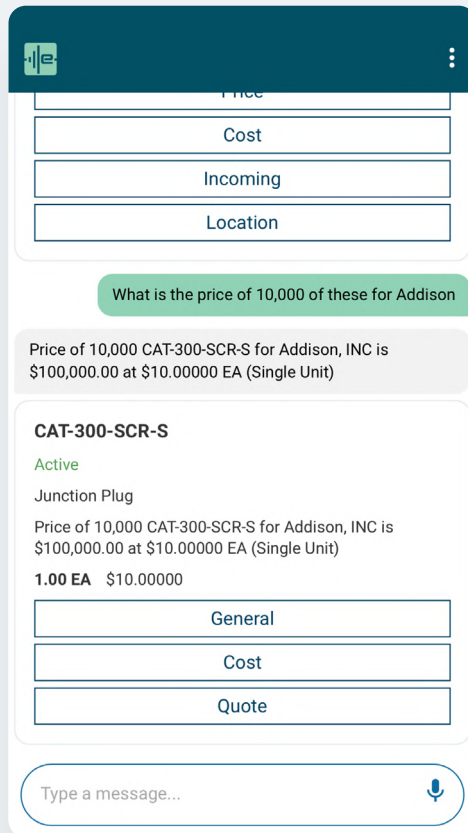
Build your own experience to maximize productivity. Simplify your job with quick optimizations to the personal workflow in the screens you use every day. Configure grids, hide/show UI fields, or collapse/expand panel cards depending on your needs.

### Epicor Virtual Agent (EVA)

EVA is an artificial intelligence (AI) powered tool that provides you access to your Epicor system. Users across the enterprise will be empowered by the context-aware, natural language processing of EVA that allows them to converse with the app through text or speech on their Android or iOS mobile devices. EVA is also available on the desktop in Epicor Collaborate. EVA is powered in part by Microsoft Azure AI services—a cloud solution that makes AI and cognitive technologies accessible and scalable for companies of all sizes. For Epicor users, the power of artificial intelligence cannot be understated.

Today's digital economy is influencing the growing demands of end customers and B2B buyers for prompt, personalized service, and rapid order fulfillment. To match these demands, companies are increasingly turning to AI and cognitive technologies. EVA solves problems today and lays a strong foundation for intelligent technologies that integrate with their Epicor system. Just launch the EVA app on your device, complete the secure login, and start texting or talking. You can access parts, pricing, and other customer or supplier information. EVA initiates actions based on this information—including creating a simple purchase order or quote or converting a quote to an order.

When you finish your inquiries and are ready to act, either press a button or say, “create a quote for 40 of ABC part,” for example. Since EVA is aware of the conversation’s context, the application knows which customer and item to quote.



What is the price of 10,000 of these for Addison

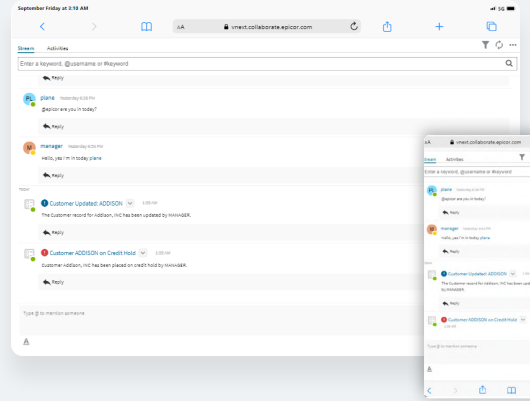
Price of 10,000 CAT-300-SCR-S for Addison, INC is \$100,000.00 at \$10.00000 EA (Single Unit)

**CAT-300-SCR-S**  
Active  
Junction Plug  
Price of 10,000 CAT-300-SCR-S for Addison, INC is \$100,000.00 at \$10.00000 EA (Single Unit)  
1.00 EA \$10.00000

General  
Cost  
Quote

Type a message...

Talk to EVA for queries and actions in Kinetic.



Messaging connects workers, suppliers, customers, and systems.

## Collaboration

When workers engage with each other to solve problems and innovate processes, your business gains a competitive advantage. Epicor Collaborate helps them do that effortlessly.

Epicor Collaborate is a productivity and collaboration tool for the whole enterprise that is built on the cloud. With hashtags and mentions, it’s easy for groups of workers to connect on a topic. Additionally, there are controls for security and moderators. As a messaging app embedded in Kinetic, Epicor Collaborate reduces the amount of time spent on meetings and emails by enabling staff members to discuss orders, customers, data views, events, and just about anything else, in context with hotlinks to system records. Employees can start new messages that can be related to a Kinetic record they have open or they can subscribe to system notifications.

Those on the go can still receive real-time messaging and system notifications thanks to a responsive mobile browser design that fits any size device.

Epicor Collaborate has key integrations that drive worker productivity including:

- **Microsoft Teams:** integration enables teams with external players to connect on project details by sharing Epicor Collaborate messages and documents.
- **IoT:** Notification of adverse events in Kinetic or directly from your equipment through IoT, drives new levels of responsiveness and productivity.
- **Epicor Virtual Agent (EVA):** Integrates to EVA, helps provide on the simplicity through natural language to answer questions of Kinetic.
- **Data Discovery:** Offers users the ability to share Data Discovery metrics through Epicor Collaborate.
- **File Sharing:** Easily share files digitally with Epicor Collaborate, including sharing files from Epicor ECM to an Epicor Collaborate message stream.

## Enterprise Search

Enterprise Search brings the Internet search experience to Kinetic. Enterprise Search provides embedded search capabilities through tag clouds of Epicor structured data that span all Epicor applications built upon it, and it can also extend beyond enterprise data to unstructured data like Word documents—all in a secure manner. Complete functionality includes:



- Secure search results
- User-definable searching
- Easy-to-find relevant business data
- Data drill-down capability
- Complete search results in a browser

### Workbench and Tracker Views

Workbenches and Trackers provide a focused, paperless, and single point for entry and review. Workbenches can automate and execute routine processes, while Trackers provide contextual information throughout the system to users with “view only” access. Designed with robust search, Trackers allow users to move easily between views—quickly getting to a 360-degree view of the customer, supplier, or part. Nearly every function is available for view. Epicor comes with many predefined workbenches—including purchasing, planning, engineering, inspection, service, sales, credit manager, and plant workbenches.

### Epicor Information Worker

According to current industry surveys, desktop productivity tools are used by 95 percent of business workers, with Microsoft Office as the standard for desktop applications. Epicor Information Worker provides a secure, seamless interface to your Epicor application from within Microsoft Outlook®, Excel®, or Word—blurring the lines between enterprise software and desktop productivity software to create a single, immersive solution.

The underlying architecture behind Information Worker provides direct access to updatable Business Activity Queries (BAQs).

### Epicor Learning

At Epicor Learning, we know that skill development leads to deeper product adoption and enhances the value that customers get from our solutions.

We want the broadest possible audience to benefit from our training. That’s why we focus on flexibility, offering multiple ways to access learning and a variety of learning methods grouped by learner goals. Whether you’re looking to build your foundation, stay productive, or extend your knowledge, skills can be acquired anytime, anywhere and in any way you choose. Epicor Learning is a complete training experience, a mapped and planned program that includes hands-on exercises and so much more. The Epicor Learning License will give you full access to Epicor Learning Center, with a deep catalog of video-based courses and hands-on exercises, role-based learning paths, and the tools to quickly manage your entire training program. Think of this as a curated, but highly flexible program.

Hands-on courses can be accessed individually, but they are also integrated into our Epicor Learning Center role-based agendas, providing a more blended, immersive learning experience where people can first your, and then do. Hands-on exercises are launched directly from Epicor Learning Center, so they can be assigned and tracked. And as part of the Epicor Learning experience, they are built strategically to work with and support the video content.

This centralizes the whole learning experience and organizes your training into definitive learning paths that take you from new user to expert.



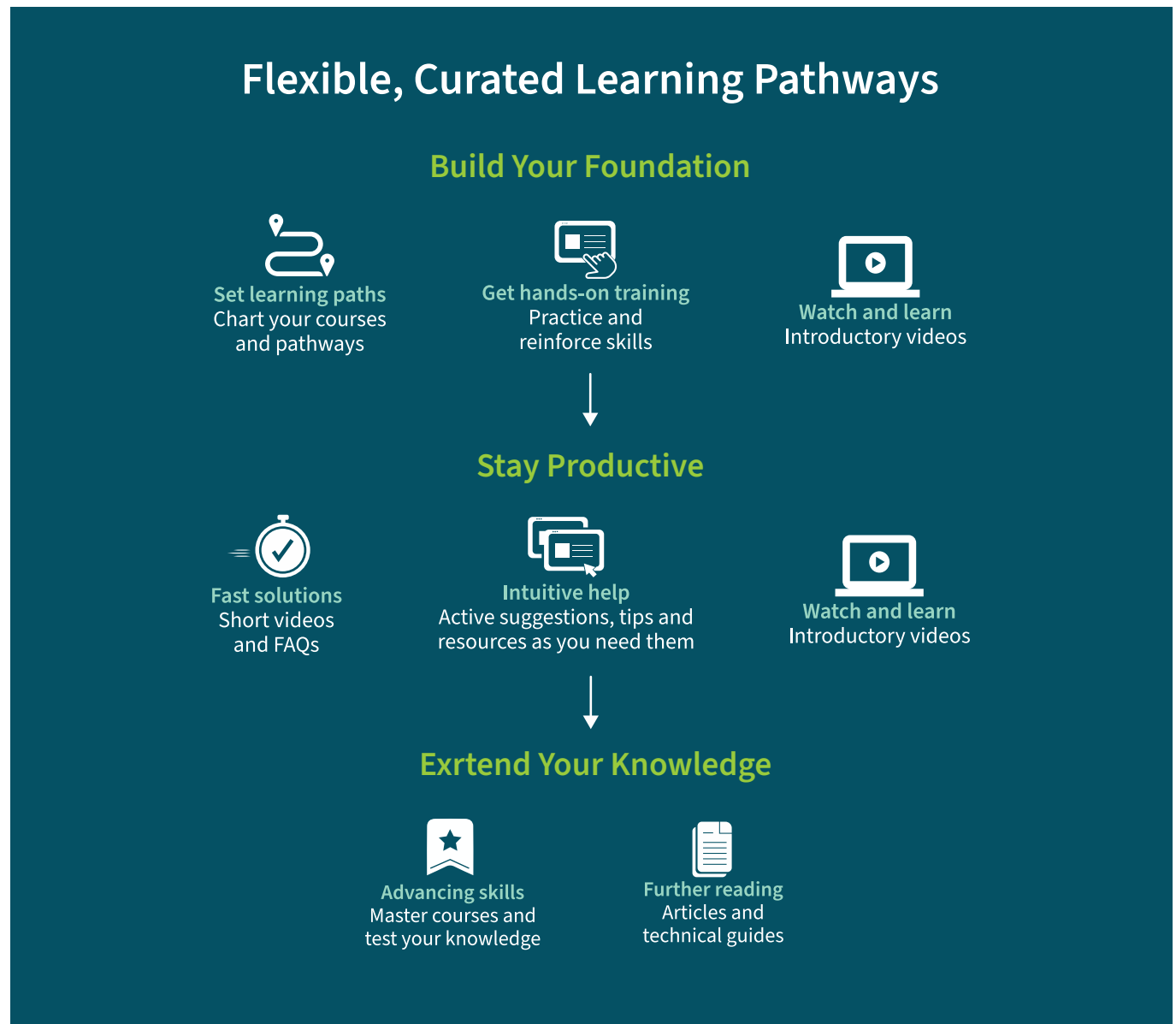
## Help and Support

The Help and Support Panel, embedded on the Home Page, provides single search access to online help articles, videos, and Guided Learning. It eliminates the need to manage multiple platforms, as you can easily access Epicor Learning Center, Embedded Education, EpicCare and EpicWeb from a single point. Quickly access personalized, relevant, and contextual information based on who you are and where you are in the system. You can also enable Field Help from the Help and Support Panel. When you have a question about an application, you can easily find the answer without leaving the system. Simply click the question marks next to fields to open a Field Help panel on the right that displays technical details. This is a great tool for onboarding users. Guided Learning is based on the concept of learn-as-you-go, taking you through a complete process in real-time, live in Kinetic. It provides product, form, and feature tours, as well as in-app communications. Experience a seamless and intuitive onboarding and training process.

## Innovative Tools Boost Greater Productivity

### Data Fabric

Integrations are time-consuming to create, they can be fragile to maintain, and may have performance issues. Fabric, a scalable, secure, and resilient near streaming platform, we can easily connect and enable enterprise agility. Data Fabric is the “behind the scenes magic” to allow visibility and data sharing to integrate Epicor to Epicor products. Events that can be handled asynchronously (where immediate response is not needed) will benefit from using Data Fabric.



*Learning accelerates adoption, develops skills, and builds confidence for users.*

## Epicor BPM

Building on and extending beyond the simple rules enforced by Business Activity Management (BAM), Epicor BPM is all about identifying and improving processes to make your business more efficient, disciplined, and better able to adapt to change. Epicor incorporates BPM technology to enable organizations to automate and streamline business processes for continuous improvement. Epicor BPM augments your current efforts of continuous improvement by allowing you to more closely tailor your Epicor solution to reflect the best practices you have developed.

Epicor BPM is integrated across the toolset to enable easier deployment of key integrations and business processes in your ERP. For example, Epicor BPM works with Epicor Collaborate as a notification engine of events, with Epicor Functions to invoke standard processes and facilitate more elegant integrations, and Epicor Automation Studio to initiate its automations and activity workflows.

Complete functionality includes:

- Seamless integration and workflow capabilities
- Easy-to-use designer with wizard interface
- Pre-process condition builder
- Post-process routine automation

## Change Data Capture

Change Data Capture is solution that allows you to synchronize information in real-time between Kinetic and other systems and applications. It identifies and captures data that you create, update, and delete from Epicor

and makes this change data available for use by different applications. A use case for this solution includes Epicor Collaborate, where greater responsiveness in the business workflow can be more easily achieved with instant notifications guiding your processes.

To offer more opportunities to build these notifications into your processes, Epicor Collaborate lets users develop custom notification rules. This is achieved with the Change Data Capture management solution.

## Task Management Workflow

The Epicor Task Management system allows you to connect your people with processes and the ERP system itself. As business processes become more complex and dynamic, it's important for any enterprise application to recognize situations and help drive people toward the right efforts and the right decisions. Task Management workflow is available in key areas of the system including CRM, Engineering, Case Management, and Maintenance Management.

## Applications for IoT

Kinetic offers multiple solutions, on the plant floor or the wider business, to leverage data collected from equipment and systems for ongoing monitoring, action, or wider analysis.

## IoT

IoT is a Kinetic module that integrates with the Microsoft® Azure IoT Hub. This application monitors and visualizes data from sensors and other Epicor products. IoT leverages Microsoft® Azure IoT Hub to gather context and in-depth production data from within Kinetic. Users

gain intelligent insights into the production and day-to-day enterprise activities, achieving deep levels of operational efficiency.

IoT can monitor data from equipment, assets, environmental factors, and inventory locations. Events, sensor data, and machine telemetry data flow into the IoT hub. From there, the Epicor IoT Administrator can choose which data propagates to the IoT module. IoT leverages an advanced rule-based engine to detect patterns and raise alerts and notifications that propagate into ERP, where they can be used to trigger business process changes. For example, when IoT detects degrading equipment, it raises a maintenance suggestion.

## Epicor Advanced MES

Epicor Advanced MES is an edge solution that collects IoT, Industry 4.0 data to drive greater production efficiency on the plant floor. It extends your Epicor system to deliver automatic production monitoring and process monitoring, empowering manufacturers with production data and the ability to eliminate inaccurate and time-consuming manual data collection; so operators can stop measuring and monitoring, and focus on making quality products.

You can achieve informed lights-out manufacturing, and get the powerful metrics you need to improve performance, including Overall Equipment Effectiveness (OEE), run rates, scrap, yield, energy consumption, material consumption, and much more. Accurate machine-related data, along with operator depth and dimension, helps you pinpoint critical issues, reduce waste, and improve quality and customer service.



## Robust Business Monitoring, Reporting, and Analytics Solutions, AI/ML

Epicor gives you a strong portfolio for monitoring, reporting on, and analyzing your business data. Enabling users with self-service tools helps ensure critical events and trends are acted on quickly and business results are optimized. Solutions that start with key business metrics for manufacturers reduce the time and effort in building business-specific metrics and shortens the time for deploying and obtaining ROI for your ERP solution.

**Note:** Refer to the “[Business Intelligence and Analytics](#)” chapter for a complete picture.

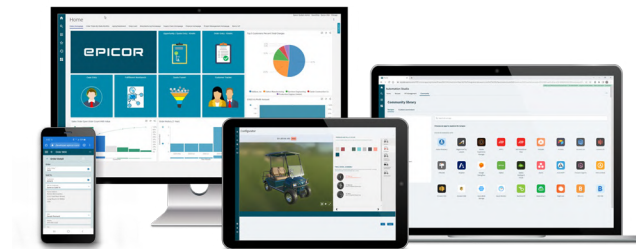
Below is an overview of the portfolio available with Kinetic:

- Business Activity Query with over 800 “out of the box” views
- Epicor Data Discovery
- Epicor Data Analytics
- Epicor Data Analytics Content Packs for Sales, Materials, Financials, Field Service, Epicor Maintenance Management, and Epicor Advanced MES
- Epicor Data Analytics modules for Financial Statements, Budgeting, and Forecasting
- Epicor Financial Planner
- Spreadsheet Server
- Epicor ECM
- Epicor Forms and Reports
- SSRS Reporting
- Advanced Print Routing
- Auto Print Control
- Bartender Label Printing

## Advanced Print Routing

Your customers, suppliers, and internal users all have different reporting and document requirements. Some may need documents e-mailed as an attachment, or deposited into a designated folder for FTP delivery. Others may still need printed copies. Information needs vary from customer to supplier, as well as between internal roles.

Advanced Print Routing (APR) is built right into Kinetic to provide important business documents and reports to the right people at the right time, with the right information. Easy-to-use tools quickly create, route, and format your reports and commercial documents. You can send order confirmations or invoices to customers, generate and submit required financial reports, and deliver parts reports or pick-lists to your operations personnel. With Advanced Print Routing, your organization can reduce reporting errors, improve customer satisfaction, and eliminate the hassle of supporting additional applications.



*Epicor ECM leverages smartphones and tablets for access anytime, anywhere.*

## Epicor Enterprise Content Management (ECM)

Epicor ECM combines with a deep integration to Kinetic to form APR Enhanced, the next level above Advanced Print Routing. It transforms your paper-based system into a fully digitized repository with document repository links in Kinetic that eliminate the waste and double-handling associated with paper and poorly maintained online folders. The central and secure document repository and optional business automation workflows for document approvals integrated to Kinetic help manufacturers achieve ISO 9001 and other certifications.

Epicor ECM is configurable for your company’s needs, and while customers traditionally have started with the Epicor AP Automation module, many manufacturers are just as interested in applying the solution to other departments, such as in packaging and shipping. In this department, the Epicor ECM PackageWorks module enables high-speed, automatic selection of the appropriate quality document packages unique to each customer’s order; it is highly valued for the huge savings in time and resources.

Complete functionality includes:

- Drag-and-drop attachments in Kinetic
- Document repository
- Industry-unique ValiDate security
- Contextual retrieval
- Document retention policies
- Multiformat document viewing
- Web browser interface
- Mobile apps

Optional functionality includes:

- Epicor AP Automation  
(**Note:** Refer to “[Financial Management](#)” chapter for more information)
- Sales Order Automation  
(**Note:** Refer to “[Sales Management](#)” chapter for more information)
- Epicor ECM PackageWorks for document package workflows
- Epicor IDC for Intelligent Data Capture
- Electronic Forms
- Connector for DocuSign® eSignature
- Customizable Workflow module

## Epicor Intelligent Data Capture (IDC)

The first step in most Epicor ECM workflows, Epicor IDC eliminates labor-intensive, error-prone, and time-consuming manual document processing. Easy to use and configure, Epicor IDC is integrated with Epicor ECM to simplify data capture for content management and business process automation. Its artificial intelligence and machine learning provides automatic self-learning for fast set-up of previously unseen invoices, with no templates or programming necessary.

Epicor IDC starts with capturing documents from emails, network watch folders, fax, multi-function-devices or via direct API connection. Next its classification engine uses AI machine learning to look at the document in much the same way a human would, asking: Is it an invoice? A purchase order? A credit memo? It looks at physical attributes, such as lines, grids, fonts, and barcodes, and it looks for key words and phrases using a machine

learning algorithm for natural language processing. It also determines where one document stops and another starts, and includes any attachments associated with a document. Finally, Epicor IDC uses unassisted machine learning with no prior setup to extract the required header, footer, and line-item data fields to send on through to Epicor ECM.

## Dynamic Documents

Dynamic Documents is a product which gives our customers the flexibility to design their own form and drive business actions within Kinetic. This feature will provide a Word Plug-in where a Word document is defined and converted into a PDF and leveraged in a Kinetic platform this allows the document type as an extension of instructions to the operator. This document will be associated with the Kinetic Job Entry, within Epicor Data Collection.

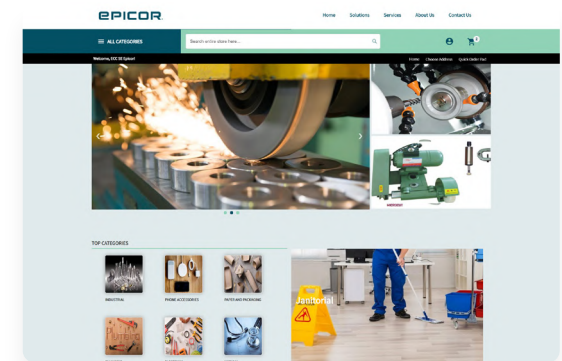
This PDF document template will be created by the customer administrator. It can be saved and will be available when starting production or starting/ending setup; the operator will be able to enter data to acknowledge that an action was completed.

## Epicor Commerce

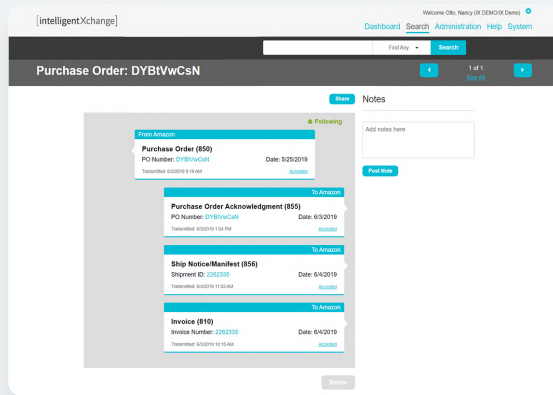
Businesses looking to improve customer service, reduce lead times through new business efficiency, and deliver new opportunities to sales will often invest in eCommerce solutions. Epicor Commerce was designed to solve the challenges of manufacturers and their unique needs as they integrate an eCommerce solution. Epicor Commerce is built on the Magento platform—a leader in eCommerce—with

a comprehensive ecosystem and tooling in constant development, enabling businesses to stay current with the latest commerce trends. Epicor Commerce is also fully integrated with Kinetic and offers the synchronization required by most commerce sites, while boasting additional capabilities needed by manufacturers—including full integration with Kinetic product configuration. Finally, Epicor Commerce easily extends to new data elements and provides a platform for eCommerce business growth.

While many companies can provide eCommerce services, very few leading providers are able to deliver the value and rapid results that Epicor Commerce affords. It can extend business boundaries with a proven commerce architecture that connects businesses to consumers, customers, and suppliers—and enables Kinetic customers to utilize their websites to help drive revenue, increase customer satisfaction, and grow their businesses.



*Epicor Commerce is always a click away for a great customer experience and additional revenue potential.*



View B2B transactions in easy-to-understand text message format instead of “EDI-speak”.

## Epicor EDI and B2B Integration

Supply chains require flexibility and resilience now more than ever. When your company transacts business electronically, prospects and customers can pivot to you quickly. You also get similar benefits when transacting with your upstream suppliers—in fact, Epicor EDI can connect any supplier to you even if they don’t have an EDI/B2B solution themselves. Whether you need traditional EDI or other B2B formats such as JSON, XML, REST API, and connections to eCommerce marketplaces, Epicor EDI—with its 30 years of innovation—has you covered. Our EDI solutions are compliant with leading supply chains and retailers including Caterpillar, General Motors, Eaton, General Electric, Amazon, Walmart, Lowe’s, Kohl’s, and many more. Base functionality is contained in the Epicor EDI [HQ] HeadQuarters™ module, the industry-leading EDI and B2B mapping and translation solution that allows full control of EDI operations.

Complete EDI HQ functionality includes:

- Highly performant JSON API endpoints built exclusively for integration to Kinetic
- Support for ANSI X12 and UN EDIFACT EDI standards
- Modern, easy-to-use interface
- “One-click” trading partner setup
- Scalability

Optional functionality includes:

- EDI/Demand Management—A Kinetic module (**Note:** Refer to the [“Sales Management”](#) chapter for more information)
- Epicor Supplier Portal (**Note:** Refer to the [“Supply Chain Management”](#) chapter for more information)
- [HQX] HQXchange—Bundled EDI and business visibility
- [IX] IntelligentXchange—Visibility and analytics tool for translating EDI data
- [MX] ManagedXchange—Fully managed EDI utilizing [HQX] software
- [AS2] AS2 Complete—AS2-compliant for secure data transport, encryption, and certificates management
- eCommerce marketplace connectors

## Epicor Electronic Reports

If your business needs to generate an electronic report from the Kinetic ERP system, the Epicor Electronic Reports module is a great solution that allows experts to produce data report files in diverse formats such as XML, JSON, PDF, and more. Epicor Electronic Reports features the user-friendly query editor solution in Kinetic, the Business Activity Query (BAQ) designer that every user has access to and which allows any user to create data queries easily with filters, conditions, and summaries. The data source can be used in any area of the Kinetic solutions, but this module is mostly used for financial data reporting such as GL transactions, Chart of Accounts, balances, electronic VAT reports, and invoice transactions.

Third-party organizations often require financial data in electronic format, including customers, suppliers, auditing firms, analysts, advisory companies, banks, investors, or authorities. Publicly traded companies are obliged to file their financial statements, quarterly reports and many forms to the Electronic Data Gathering, Analysis, and Retrieval (EDGAR) system used at the U.S. Securities and Exchange Commission (SEC).

Epicor Electronic Reports also support electronic invoicing and digital signature solutions. The CSF packages also use this module to provide digital report files required by local legislations across the globe. Epicor Electronic Reports helps your company do business globally.

**Note:** Refer to the [“Financial Management”](#) chapter for more information on this solution.





### Demand-Side Documents

- (ORDERS, 850) Purchase Order—Inbound
- (ORDRSP, 855) Purchase Order Ack.—Outbound
- (INVOIC, 810) Invoice—Outbound
- (DESADV, 856) Adv. Shipping Notice—Outbound
- (DELFOR, 830) Planning Schedule—Inbound
- (DELJIT, 862) Shipping Schedule—Inbound

### Supply-Side Documents

- (ORDERS, 850) Purchase Order—Outbound
- (INVOIC, 810) Invoice—Inbound
- (DESADV, 856) Adv. Shipping Notice—Inbound
- (DELFOR, 830) Planning Schedule—Outbound
- (DELJIT, 862) Shipping Schedule—Inbound

*Built-in Epicor EDI API endpoints support these documents for Kinetic.*

## Align Greater Fit to Business Needs With Configuration and Integration Technologies

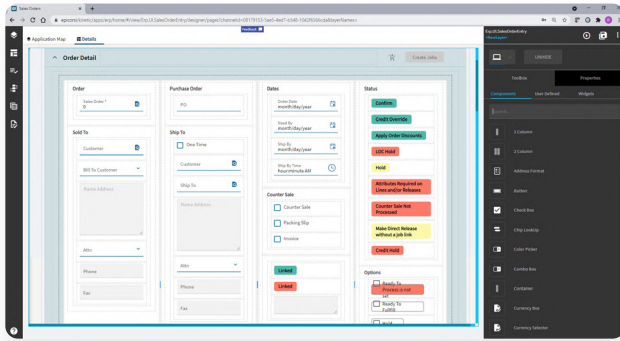
### Epicor Application Studio Configuration

We understand one size doesn't fit all. Epicor offers the flexibility you need to easily configure the system to meet your unique industry and business requirements. For businesses, Epicor Application Studio takes a best practice approach to system configuration. It takes out the complexity of changing code, as configuration is done in a low/no code environment. Protect your investment by staying current with the latest releases, as the configurations done with Epicor Application Studio are easier to upgrade, secure, and cloud friendly. Epicor Application Studio tools offer an easier and faster way to build your own experience. Configure screens, fields,

row rules, events, page layouts, and more through a visual designer and drag-and-drop functionality to add components—all done in a low/no-code environment. Easily access your existing configurations through a published menu, load into the editor and preview your configurations before deploying them to other users to make sure you achieved the desired outcome. Also, you will have fast access to education resources from the application to get you started in no time, with specific training around the different elements and use cases.

- Cloud friendly
- Epicor Functions
- Epicor BPM integration
- Low code-/no-code configurations
- Upgrade resilience





*No-code/low-code configurations provide flexible solutions to help you stay ahead.*

## Epicor Functions

Epicor Functions sits alongside BPMs. When you create functions, you set up your own unique ERP method. Both internal and external sources can then call this function to execute Kinetic processes (services). For example, a function can be called internally to look up a phone number or called externally from an outside program that attaches documents to part records. To maximize reusability and efficiency for developers, an Epicor Functions library is built over time to reuse these functions—eliminating the need to copy and paste this logic to multiple BPM directives. Additional advanced use cases for leveraging Epicor Functions include building a standard set of fields that could be fed into the function from an outside system, such as an eCommerce site or EDI transaction.

## Business Activity Query Views

Generate a custom view of your Kinetic data using a complete toolset. Business Activity Query (BAQ) views can be built so you can update data, too. Users can generate any table of business data and quickly update key fields. This capability is often leveraged in updatable dashboards, Epicor Application Studio configurations, and as this is exposed as a REST service, integrations to third-party applications.

## Cloud SDK

Without having to write a single line of code, users can create additional user-defined (UD) fields in Kinetic that automatically generate database tables and a REST API namespace, with basic methods to expose the UD Field across Kinetic to tailor custom business applications.

## REST API

Everything in the system, including both the back end and user experience, is available through OData compliant RESTful web services for easy implementation, customization, and cross-platform portability. Combined with powerful no-code/low-code Kinetic tools, even average business users can tailor functionality and user experience to meet their business requirements. With Kinetic open APIs, you can improve efficiency in many ways:

- Anything the user interface (UI) can do, you can do with our open APIs
- You can build your own custom applications and connect with Kinetic

- You can integrate data into other business systems and applications
- Epicor Functions lets you design your own RESTful services, especially custom logic, that you can use anywhere
- BAQs let you make custom views that you can use anywhere in the system
- Integration with external systems with API keys and added security

## Epicor Automation Studio, Powered by Workato

Epicor Automation Studio is a cloud-based enterprise automation platform that can automate the connections of Kinetic things to other things outside of the Kinetic platform, as well as automate connections between things inside the Kinetic platform. Using little to no coding, your Citizen Integrators can easily integrate and automate scheduled and event-triggered workflows and robotic process automations (RPAs) between apps, data, and Kinetic with this module embedded in Kinetic. Epicor Automation Studio is commonly referred to as an integration platform as a service (iPaaS), but is more accurately described as an integration-led automation module. Salesforce, ADP, and ServiceNow are just a few of the 1,000+ connectors available. Over 400,000 automations (known as recipes) are also available in Workato's online community, which they may easily customize to their specific business needs. Additionally, Epicor provides Industry Templates, a curated collection of recipes created by Epicor Development and customers exclusively for Epicor customers.



Without ready-made integrations and automations, workers can squander hours manually logging data from other sources and updating records in Kinetic or following manual procedures, such as approvals and data audits, instead of focusing on the value-added tasks they would rather do. Epicor Automation Studio addresses these issues with an enterprise-class integration tool, powered by Workato, that can be governed and monitored by IT, but that also offers the ease of use and low barrier to entry expected from consumer applications. The advantages will be felt throughout the organization.

Finance and Accounting will benefit from automating monthly exchange rate adjustments in Kinetic, Sales will benefit from producing an order in Kinetic from an opportunity in Salesforce.com, and HR will benefit from uploading labor data from Kinetic to ADP. Automations aren't just triggered by integrations to things outside

of Kinetic; Kinetic events can also activate automated procedures inside Kinetic, such as correcting data that was found to be incorrect after a transaction. These are just a few of the many examples that can assist your company in accelerating its digital transformation.

Compared to other integration methods, Epicor Automation Studio is easier to use, monitor, and debug; it runs in the cloud; and you can choose from 400,000+ recipes and 1,000+ connectors to outside apps. Automation Studio covers more scenarios and its recipes can be run from any of these starting points:

- Trigger from an app—For example, “when a new or updated record event happens in Kinetic, do this...”
- Run on a schedule—Any time-based schedule—for example, every five minutes, hourly, daily, weekly, or any chronological calculation you want.

- Trigger from a webhook—A “lightweight API” that waits for a response; for example, it can generate an email containing buttons “Approve/Reject Purchase Order.”
- Trigger from another recipe—Lets you separate repeatable sets of actions into recipes that you can re-use in other recipes.
- Trigger from an API endpoint—Makes a recipe an extension of any other systems that can call an API, such as a recipe initiated by a Kinetic BPM or Function.

The bottom line is Epicor Automation Studio provides a cost-effective way to quickly connect and automate your Kinetic applications internally and with external systems.





## Epicor Integration Cloud

Epicor Integration Cloud is the platform of choice for business system integration to allow customers to meet their specific business needs. This may also include compliance with ITAR and other data regulatory requirements, with extensible integration. Beyond the standard integrations to Salesforce, and other packaged integrations spanning industry leaders in such areas as CRM, eCommerce, Analytics, 3PL/Logistics, and HR, it is possible to create additional integration mappings of standard objects. Custom fields can also be included in synchronizations and automation using the Jitterbit Harmony studio in the Epicor Integration Cloud Platform. This can be done at any time—either during an initial project or in a subsequent phase by the Epicor Integration team or self-service by the customer.

Epicor Integration Cloud includes training that allows an IT resource to come up to speed on building integrations to different end points, amending an existing integration, monitoring transactions, and keeping pace with evolving APIs.

## Pivot Easily to Meet Demands With Flexible Cloud Solutions and Deployment Choice

Being an industry leader in global cloud ERP is in the DNA of Epicor. We aim to meet the changing needs of your business with flexible cloud solutions that drive results today and into the future. Wherever that growth takes you. Kinetic is cloud ERP with a deployment choice of public cloud, on-premises, or hybrid cloud. Hybrid cloud allows businesses to step into the cloud with extensions, without running their

entire ERP in the cloud. As the solution offered uses the same technology, regardless of cloud or on-premises, businesses can also choose to selfhost the solution or work with a third party. Multinational organizations benefit from additional flexibility as distributed business units have deployment choices across the enterprise, with some sites choosing cloud and others choosing on-premises deployment. Businesses may choose on-premises because of the region or due to remote geography that may cause challenges for cloud.

To fully meet the needs of our customers, Epicor has created a complete portfolio of cloud service offerings designed to reduce the complexity of choosing cloud for your business. Whether you are new to Epicor or an existing customer looking to migrate to the cloud, Epicor gives you a complete offering designed to simplify your experience to cloud, including:

- Microsoft Azure public cloud, with its rich cloud infrastructure and services
- Separation of the application infrastructure from the database layer, providing additional security and control over your cloud environment
- Industry cloud expertise where solutions unique to your industry are available, such as the Kinetic for Life Sciences in the cloud and Azure Government Cloud
- Cloud upgrades twice a year with innovative new functionality, and minor security updates every month to keep your business information protected

- Anti-malware, redundant backups, and disaster recovery in-region for business continuity and resilience
- 99.98% historical global uptime—we run Epicor solutions on world-class Azure data centers in all major regions worldwide; you can view our uptime anytime online at <https://status.epicor.com/#/>
- A partner ecosystem certified for industry cloud and enabled with tooling, to help ensure the success of your implementation

## Additional Pilot For Test Environments

Optionally choose to extend your cloud solution with an additional environment for testing or development of extensions, without impacting your production cloud environment.

## Upgrade Flex

Business demands may require additional time before transitioning to the new cloud upgrade. Optionally defer or “flex” the upgrade up to 90 days, using the Flex option.

## Cloud Production Environment Copy

Technology leaders and system administrators drive significant value by expertly leveraging ERP data to better understand the business, drive efficiencies, and identify growth opportunities. Access your data with a read-only copy of your production environment with ODBC or Azure Data Studio for data queries or integrations to third-party solutions, such as Microsoft Power BI.

### **Multi-region, Multicompany Cloud Transactions**

Kinetic offers the ability to enable a distributed cloud or hybrid cloud business model to unify your business and accelerate your strategic growth plans. With this feature, you can now enable multicompany transactions to occur among separate, distinct instances of Kinetic.

- Across Microsoft Azure data centers in different geographies (distributed cloud)
- Across Microsoft Azure data centers to on-premises locations (hybrid cloud)

For multinational organizations with company locations across the globe, you can gain a consolidated view of multicompany transactions without having to run all of them out of a single Kinetic database in a single Azure datacenter. With the Multi-region, Multicompany Transactions, you gain new freedom to connect intercompany transactions such as purchasing sales orders, and reporting across multiple ERP instances. These instances, or databases, can serve any number of company locations, in the cloud or on-premises, so you can roll out a cloud strategy in phases, meet local requirements, and improve global visibility and alignment.

### **Kinetic for Life Sciences in the Cloud**

The availability of critical business systems in the cloud improves your ability to compete. Cloud enables both business agility and the increased speed at which technology is delivered to better meet business needs for innovation. Additionally, Kinetic for Life Sciences in the cloud helps provide the flexibility to support annual Kinetic upgrades in a heavily regulated space.

The solution couples regulatory documentation with an upgrade cadence designed for Life Sciences and their strict regulatory requirements.

### **U.S. Government Cloud for Aerospace and Defense**

Select the U.S. Government Cloud solution for compliance with ITAR and CMMC regulations. In addition to running your Kinetic solution in the Microsoft Azure U.S. Government Cloud data center, Epicor assigns US nationals to support your environment and infrastructure to help ensure compliance.

### **Secure Critical Business Systems With Reduced Effort**

Protecting your business from cyberattacks and natural disasters gets increasingly complicated as technology gets more sophisticated, attacks are more difficult to detect, disasters are more widespread, and the growing importance of data means the stakes are only getting higher. The question now is not if cybercrime is going to happen, but when it does, do I have the right protections in place to keep my business safe? Kinetic helps you answer this critical strategic question with important safeguards like data backups, authentication services, managed firewalls, and antivirus capabilities. With Kinetic you can build layers of protection that reduce risk to your business, including:

- Multifactor authentication
- Disaster recovery in region
- Daily backups retained for 30 days
- 24/7 security monitoring
- Periodic tests and audits to help ensure reliability

### **Epicor Security Suite for Hybrid and On-Premises Deployments**

Securing internal systems, including networks and workstations, from security threats can be an expensive and complex initiative for most businesses. The Epicor Security Suite is designed to reduce this cost and complexity, helping provide the peace of mind that your systems will be ready when you need them.

Epicor Security Suite includes key components that provide state-of-the-art, comprehensive cybersecurity protection, including:

- Epicor Secure Firewall Service
- SonicWall Capture Client Endpoint Protection
- Epicor Secure Backup
- Cellular ISP Failover

### **Application-level security**

The Kinetic comprehensive security features secure access to multiple companies, without having to close all forms or carry out different logins when switching companies. Plus, Epicor provides options for user authentication services with Epicor Identity Provider or Microsoft Azure Active Directory for single sign on (SSO), multi-factor authentication (MFA), and standardized password policies, as well as method security protocols to secure types of processing users are able to carry out—like allowing a user to update an existing part but not add a new part—by user or group.

Complete security features also include:

- Data-level security
- Security reporting
- Online edits and audits
- Date and time, using server time and user name for auditing
- Product security
- Application security
- Access security
- Business security
- Change logs
- Complete audit control
- HTTPS protocols
- Support for Microsoft SQL Server® Transparent Data Encryption (TDE)
- Data masking
- Multifactor authentication







We're here for the hard-working businesses that keep the world turning. You're the companies that make, move, and sell the things we all need. Trust Epicor to help you do business better. Your industry is our industry, and we understand you better than anyone. By working hand-in-hand, we get to know your business almost as well as you do. Our innovative industry solution sets are carefully built to fit your needs and respond flexibly to your fast-changing reality. We accelerate ambitions, whether you want to grow and transform, or simply become more productive and effective.

*That's what makes us the essential partner to the world's most essential businesses.*

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