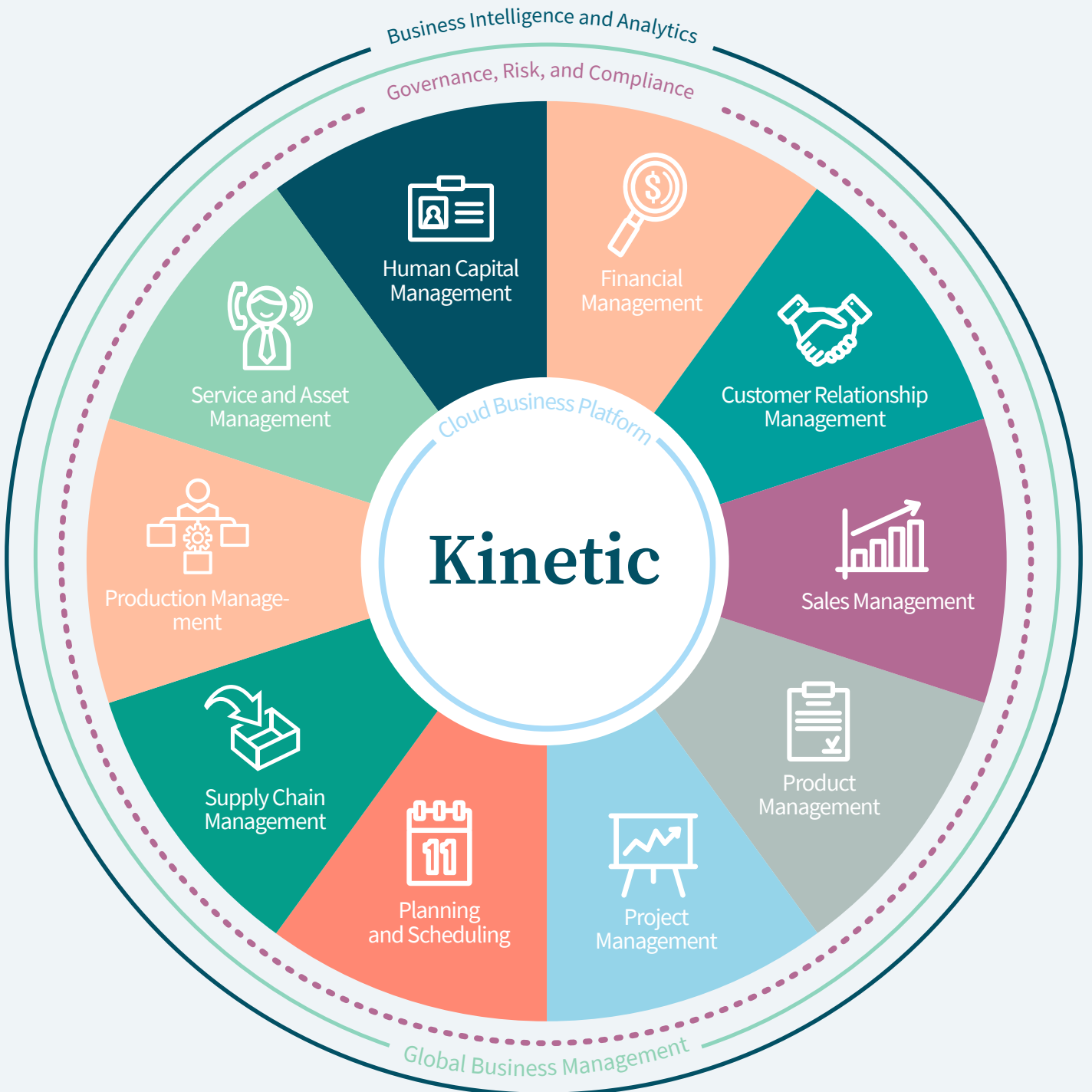**EPICOR**

Epicor Overview

Kinetic

We're here for the hard-working teams that keep the world moving

For almost 50 years, Epicor has worked hand-in-hand with our customers to get to know their business almost as well as they do — creating industry-specific software solutions and services that help them do business better. That's working with you, for you.

Our customers are the companies who make, deliver, and sell the things we all need. They trust Epicor to help them do business better. By working hand-in-hand with our customers, we get to know their business almost as well as they do. Our innovative solution sets are carefully curated to fit their needs, and built to respond flexibly to their fast-changing reality. We accelerate every customer's ambitions, whether to grow and transform, or simply become more productive and effective. That's what makes us the essential partners for the world's most essential businesses.

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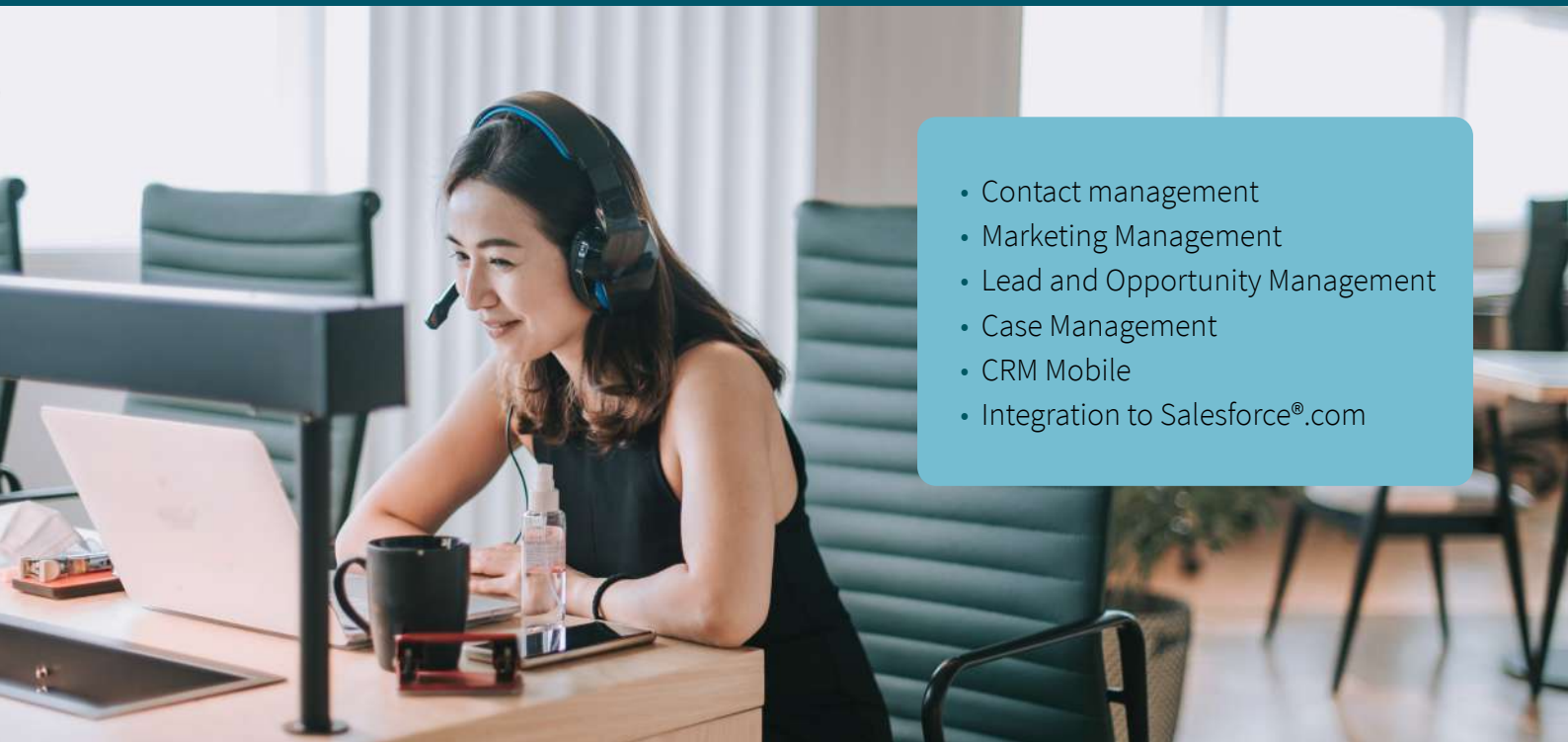- Security Management

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Customer Relationship Management

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

Customer relationship management (CRM) strategies are as important to businesses today as they have ever been. We've designed our CRM 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 provides 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.

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

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 and helps manage contact interactions through task management. Improve overall focus and responsiveness by putting your contacts at the center of your business.

Marketing Management

With eMarketing and eSurvey, 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 force by synchronizing essential CRM data with Microsoft® Office, giving your sales force access to prospect and customer information, including sales history within Microsoft Outlook®, Microsoft Excel®, or Microsoft Word.


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 provides a customer focused solution for personalized, high-quality service. This comprehensive one-stop solution comes equipped with time saving links to customer-focused activities (e.g., new quotes, orders, RMA requests, or service calls), plus a search-driven knowledgebase and case-driven workflow for standardizing case resolution. In addition, Case Management is 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 at the focus of your business today means that you need to be able to respond 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
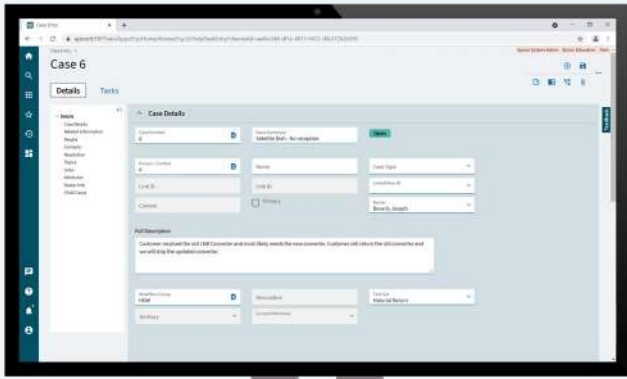
Case Management – Shorten service response time by collecting detailed product problem information and using integrated featres to initiate requests to the appropriate resource.
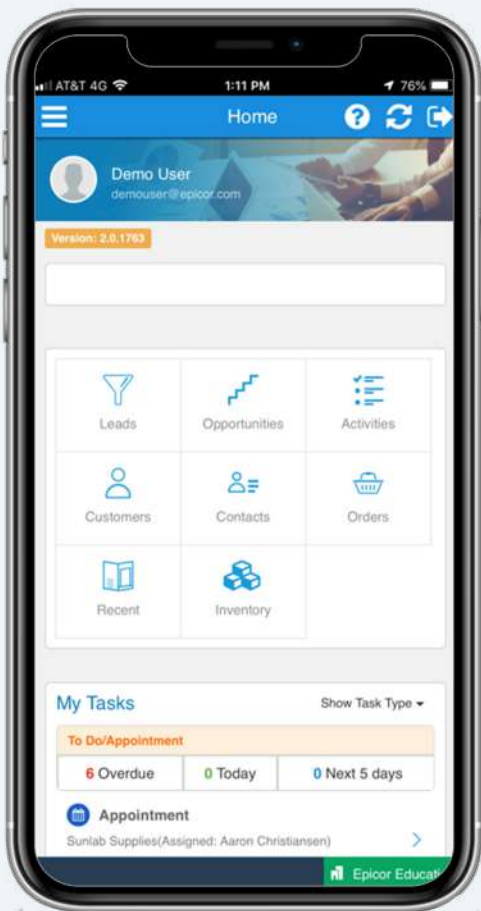
With CRM Mobile manage the sales cycle from opportunity to order shipment—anytime, anywhere.

capabilities on iOS™ and Android™ devices. Through CRM Mobile, you can manage leads, customers and contacts, as well as quotes, from opportunity to order shipment. Create activity-based workflows like call and email logging, notes, "to do" lists and appointments, and implement your back office task workflow. Access data related to competitors, cases, projects, and order history—even without Internet connectivity. Also, visualize your customers and prospects on a map while in the area, and 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 Integration Cloud – powered by Jitterbit – includes robust Salesforce software and Kinetic connectors. Together, they make up the fastest, most complete way for Salesforce software and Epicor customers to marry key processes. Using pre-built accelerators implemented by the Epicor integration team, pricelists, parts, customers, and quotes are integrated between the two systems.

Sales Management

- Estimating and Quotation Management
- Order Management
- Sales Order Automation
- EDI/Demand Management
- Point of Sale
- Commerce Connect
- Dealer Network Portal

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

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. Create estimates and get quotes out more quickly with more accurate pricing and lead times with a wide range of powerful tools.

Estimating Management

Generate cost-based estimates easily utilizing 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 create a new one. 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. 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

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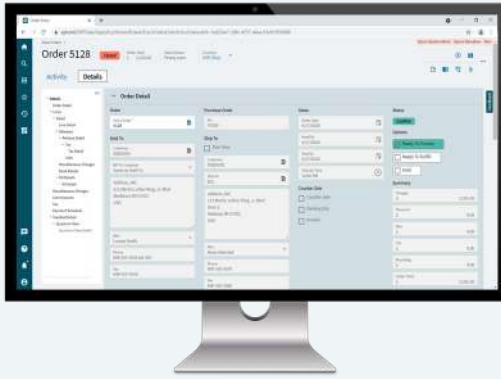
Order Management—Manage sophisticated sales requirement—from the time an order is entered until final shipment.

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.

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 support the ability to define multilevel 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, Epicor offers the Advanced UOM module that reduce the complexity of implementation by reducing the amount of configuration needed to fit these unique needs. The benefit of Advanced UOM functionality is that it delivers a simplified approach to finding the right inventory by segmenting inventory with 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, ensuring accurate supply and demand are met.

Up-Sell, Cross-Sell, and Down-Sell

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

Capable-To-Promise

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

Order Shipment Parameters

Order Shipment Parameters With Order Management, all orders and change orders will be effectively managed online, helping to perfect the order-to-delivery process for maximum customer satisfaction. Set up the appropriate shipping parameters including the ability to manage;

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

Credit Card Processing

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

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 Collaborate. Easily subscribe to notifications about changes to orders without building Business Process Management (BPM) controls. View a summary of all the changes to the order in an activity stream inside or outside 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, faxes, 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 Enterprise Content Management suite, Sales Order Automation (SOA), takes the extra work and worry out of sales order entry.

The process is as follows:

- Capture – Intelligent Data Capture (Epicor 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 Enterprise Content Management (Epicor ECM) suite of products.

EDI/Demand Management

Today, all suppliers large and small are facing increased expectations from their customers to have systems in place for immediate response to changes in their demand such as forecast and shipping schedule changes. Epicor EDI/Demand Management secures your competitive edge by incorporating electronic data interchange (EDI) with demand scheduling. The EDI/Demand Management framework leverages the SOA business architecture of Kinetic and deep industry experience in EDI to lower the cost of EDI deployment. The framework provides full flexibility and control for setting up customer contracts and handling their schedules once inside the 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 EDI setup and existing staff.

Demand Management

A component of the embedded EDI/ Demand Management module, Demand Management starts with a "contract" set up per customer with such agreed-upon parameters as pricing, initial demand schedule, and contract end date. The contract is then linked to incoming purchase orders, forecasts, and shipping schedules.

These contracts can be managed, and schedules produced, automatically with set periodicities or schedule constraints that match each customer's unique shipping needs. Additionally, as changes happen, the schedules can be updated, and changes matched to existing sales orders, which are then updated accordingly. You can use Demand Management without EDI, and if EDI is deployed, your customers' electronic demand changes are brought in automatically for system review and acceptance into sales orders or forecasts in your Kinetic system, according to parameters and tolerances you specify. This is especially important for companies doing business in automotive as well as other industries such as industrial, consumer products, retail, and aerospace and defense.

Demand Management capabilities include;

- Demand Contract structure provides the ability to have many sales orders/ lines attached to the contract.

- Demand Entry Management Console supports one inbound purchase order at a time, or 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 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 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.

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

Epicor Point of Sale (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. Epicor POS provides 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.

Commerce Connect

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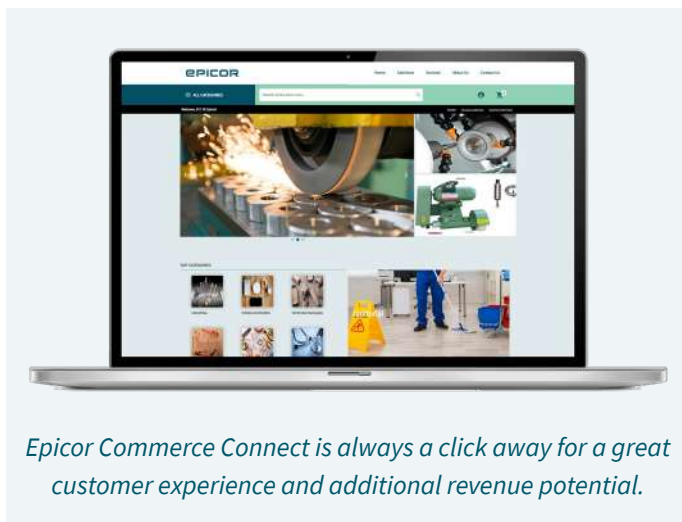
Epicor Commerce Connect is always a click away for a great customer experience and additional revenue potential.

The key advantage of Epicor Commerce Connect (ECC) is its deep integration to Kinetic. Epicor Commerce Connect negates much of the risk that goes with using a non-integrated eCommerce solution by getting all of its information direct from the ERP platform. All transactional data flows seamlessly between Epicor Commerce Connect and Kinetic: product information, customer specific pricing, inventory levels, and more, can be viewed online via Epicor Commerce Connect. Multiple ECC offerings are available, offering you a choice of capabilities to match your current digital online strategy and gives you the ability to upgrade as you experience business growth.

- Express – quick to implement and affordable B2B online customer online portal with all the elements that allow businesses to immediately stay connected with your customers and suppliers.

- Base – a complete package of B2B and B2C ecommerce functionality with a standard set of site themes, features, and implementation hours for faster time to market and good ROI.

- Advanced – a highly customizable offering with a full feature set to allow your business to express your brand online and maximize your omni-channel presence.

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

A Modular Approach to a Better Web site

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

You can also provide tools to help your customers make better purchasing decisions including the ability for customers;

- To see related products
- Compare different 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.

Product Configurator

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

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

Dealer Network Portal

Epicor Dealer Network Portal is an innovative enterprise solution designed for manufacturers who sell or service products through dealers. Powered by Epicor Commerce Connect (ECC) and tightly integrated with your Kinetic platform, Dealer Network Portal creates a modern online experience for your dealers to rapidly configure, price, and quote orders, as well as manage service and warranty needs for 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 helps enable you to drive business growth as a preferred innovative brand.
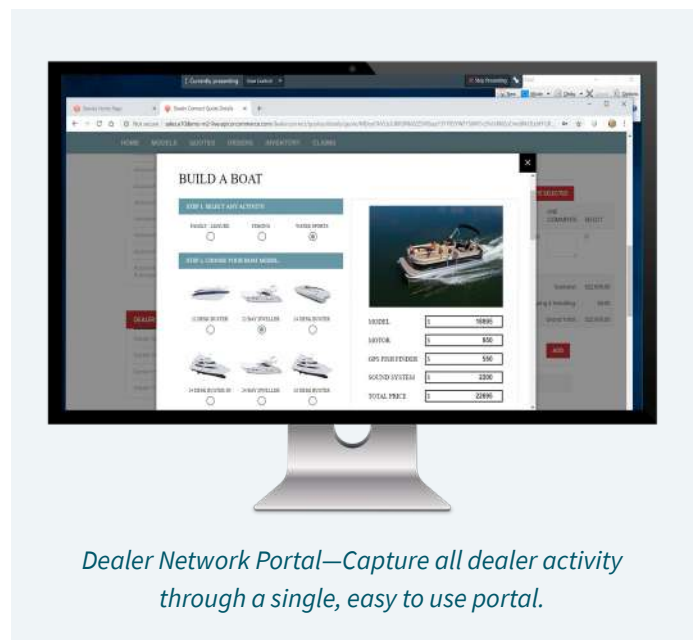
Dealer Network Portal—Capture all dealer activity through a single, easy to use portal.

Product Management

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

Product Management serves as the central hub for your process and product data and history. It provides 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) provides 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 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.

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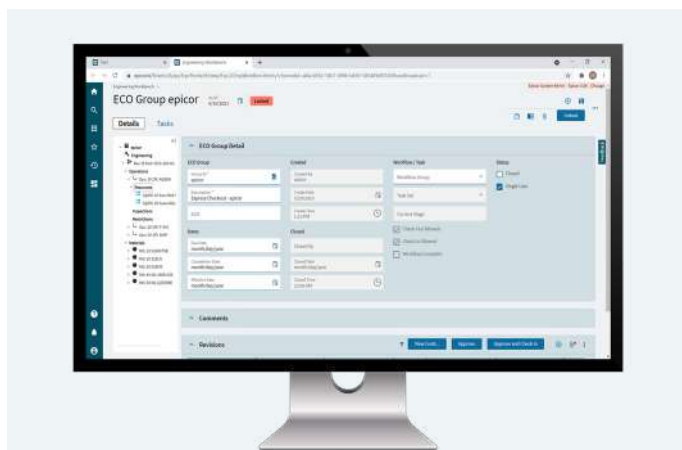
Methods of Manufacturing—Build a visual view of a routing for a new part using the integration to other engineering information and the drag-and-drop interface.

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 allows 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, and it offers 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, ensuring strong control of product and process documentation at each product revision and production run. Attachments at the record level would typically provide information, drawings, documentation, or context specific to that record. All attachments can be secured using standard role-based security.

Epicor Enterprise Content Management (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 Epicor PLM vault, and other cloud repositories such as Google Drive™ and Dropbox.

CAD Integration

For companies who do not require the full product lifecycle management solution, CADLink for Epicor increases the speed of engineering data flowing from the engineer's desktop to the rest of the business—in particular procurement and manufacturing. The 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.
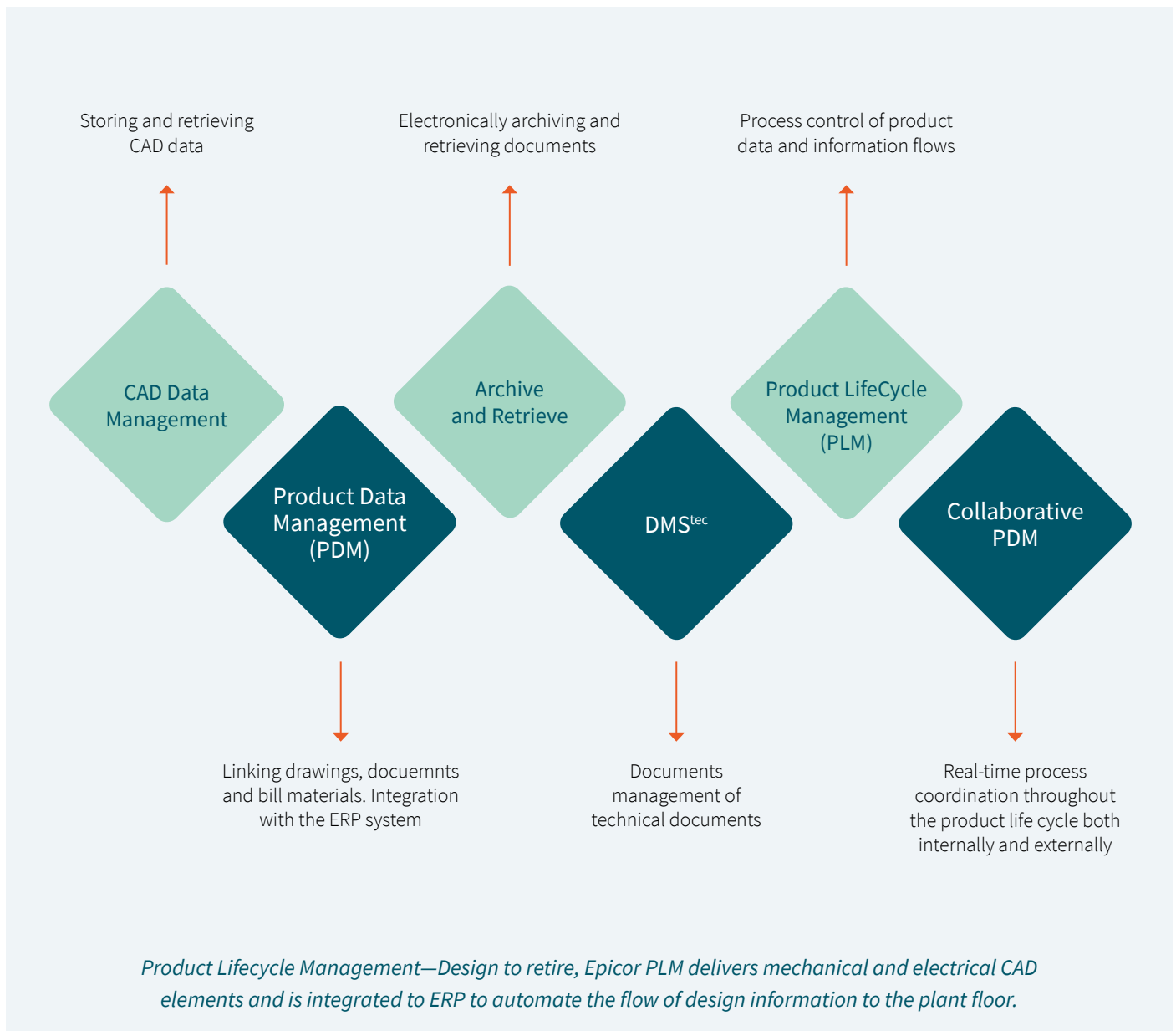
Product Lifecycle Management

Epicor Product Lifecycle Management (PLM) solutions provide you with CAD data management, product data management (PDM), and technical document management system capabilities that can be expanded to deliver a fully featured, collaborative product lifecycle management solution that is designed to seamlessly integrate into Kinetic. Epicor PLM serves as a central knowledge repository for process and product history and promotes integration and data exchange among all enterprise users who interact with a product. Epicor PLM manages all documentation associated with a product throughout its entire 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 work flow, use CAD or EDA systems, or use drawings to produce a quote or an order. Epicor PLM provides an electronic vault where documents can be securely stored and where access and versioning can be tightly controlled. The type of sophisticated document management that PLM offers is critical for those organizations that need excellent audit tracking and control of all documents across the enterprise. PLM also provides advanced document search and retrieval functionality. Increase your productivity by more efficiently managing the product life cycle—from design to end-of-life. Engineering change order (ECO) processes are supported—including the ability to have as many 3D models as desired and any number of derived technical drawings from one or more CAD systems assigned to each part.

Epicor PLM supports the entire product change order management. All changes to CAD models or drawings are documented in a change history. History entries include date, change reason, and user. Additionally, processes defined using Epicor PLM Workflow assures change order control—from the beginning of the modification to the final release. All part master data, characteristics, and the change history journal are transferred and documented in the title block of the respective drawings. Upon further modifications, this data is updated automatically. Additionally, the BOM can be inserted into the drawing.

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

Storing and retrieving
CAD data

Electronically archiving and
retrieving documents

Process control of product
data and information flows

**CAD Data
Management**

**Product Data
Management
(PDM)**

**Archive
and Retrieve**

DMS^tec

**Product LifeCycle
Management
(PLM)**

**Collaborative
PDM**

Linking drawings, docuemnts
and bill materials. Integration
with the ERP system

Documents
management of
technical documents

Real-time process
coordination throughout
the product life cycle both
internally and externally

*Product Lifecycle Management—Design to retire, Epicor PLM delivers mechanical and electrical CAD
elements and is integrated to ERP to automate the flow of design information to the plant floor.*
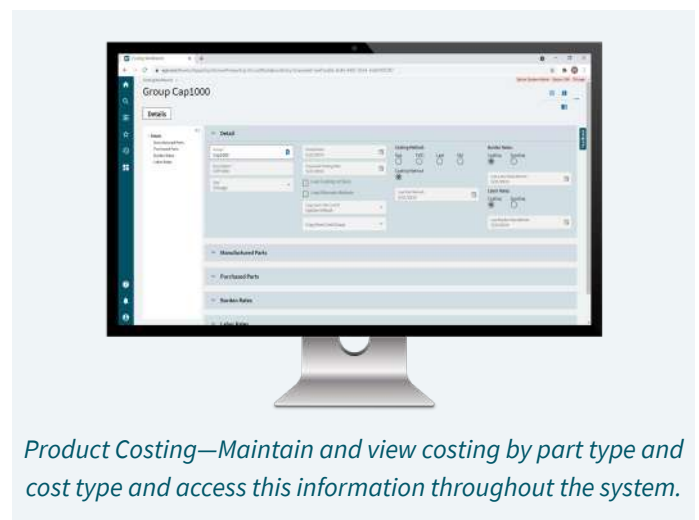
material, labor, burden, subcontracting, and material burden cost. Costing methods include average, lot, last, first in/first out, and standard. The costing workbench supports the management of part costs in a single location. Specialized tools pull in the most recent costs and automatically perform 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.
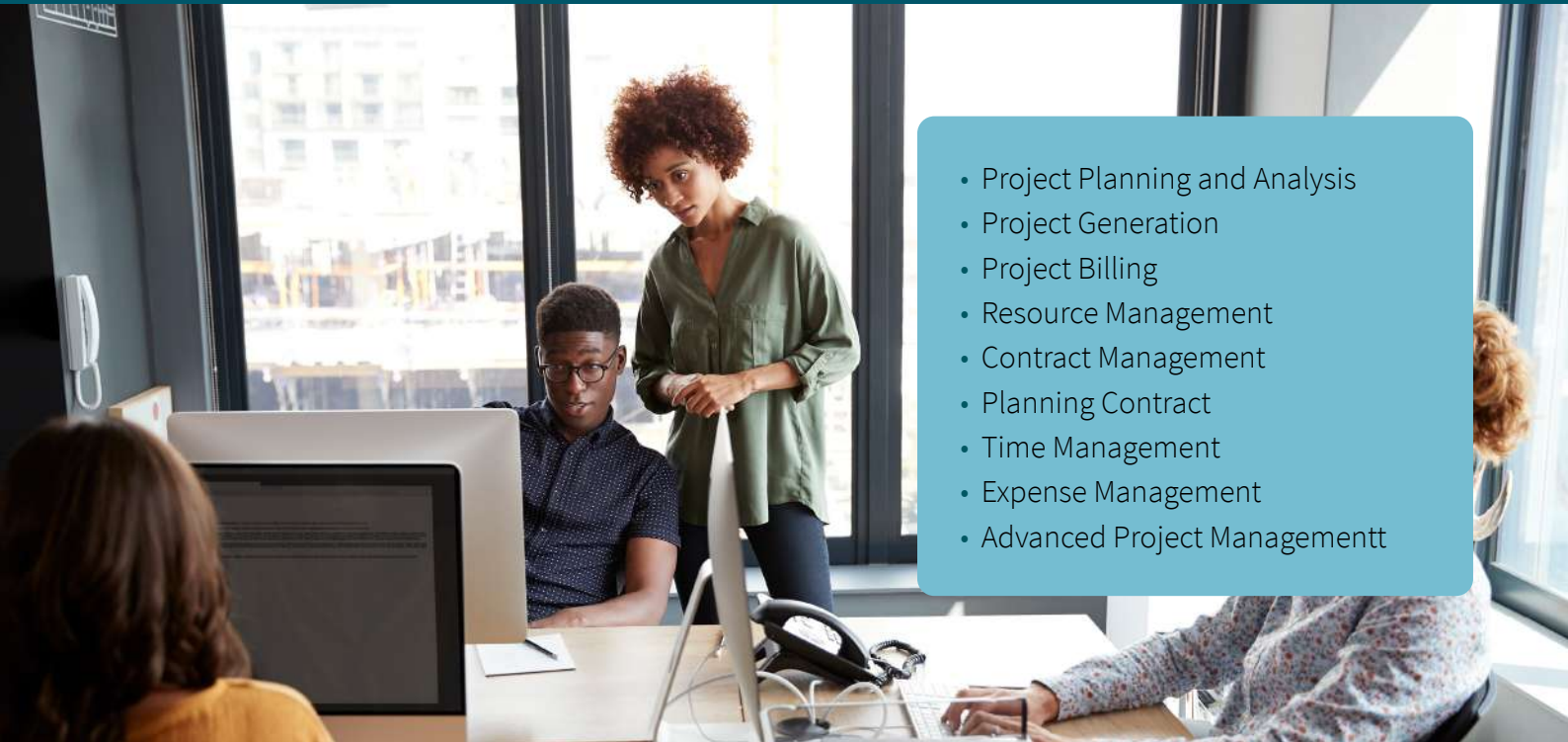
Product Configuration

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 Connect or the Dealer Network Portal.

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

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

Project Management

- Project Planning and Analysis
- Project Generation
- Project Billing
- Resource Management
- Contract Management
- Planning Contract
- Time Management
- Expense Management
- Advanced Project Managementt

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 capabilities of Epicor, Project Management utilizes detailed estimation, planning, scheduling, costing, and supply chain logistics for complete control and analysis of any project.

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

as required against each phase job. Optionally define workflow and approvals overrides at the phase level. Create a library of template project WBS structures to represent the various methodologies or requirements of recurring projects. Project structure and contract details can be manipulated in duplicated projects to reflect any nuances on a particular engagement. 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.
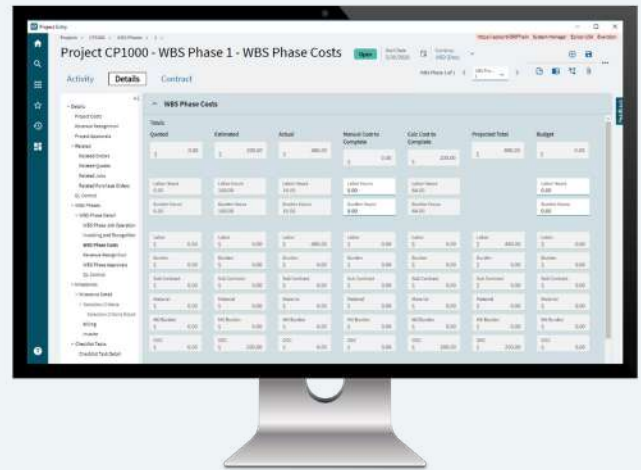
Project Planning and Analysis—Effectively manage the project work breakdown structure no matter how complex. Ease the burden on project managers by providing access to everything relating to the project in a single place.

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, Project Management offers the robust scheduling engine for complete visibility and management of the project schedule. The 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, defined resource roles, and planned hours

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— embedded in multiple networks both internal and external to the organization. Each member of the team has unique connections inside and outside the organization.Epicor Collaborate allows the project team to tap into social networks for expertise and improved access to knowledge to 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 continue or cease invoicing for the defined resource. Epicor BPM can be used to monitor as ceilings are approached. To cater for the needs of certain industries— notably contracts dealing with the U.S. Department of Defense—Burden Sets and the sequence in which they are applied may be maintained and defined against the project contract.

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.

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.
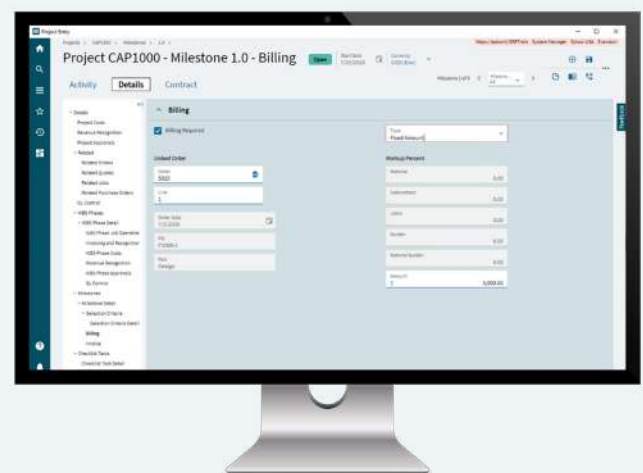
Project Billing

Project Management allows you to generate progress and milestone billing, so you can invoice your customer and optionally defer the revenue and cost of sale—recognizing them at various stages in the project.

Invoices can be generated based on a fixed date, fixed amount, user-defined stage of project completion, or user-defined cost-to- date. More complex contract arrangements can be defined using the sophisticated options available in Epicor Project Billing.

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

Resource Management

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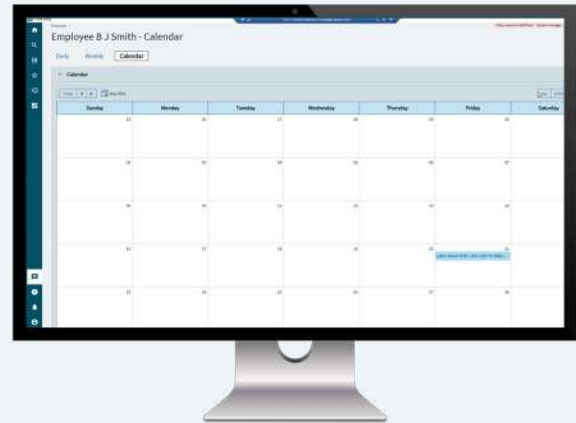

Project Billing—Comprehensive contract management provides a range of invoicing options to cater for any billing situations.

Time Management

Time Management in Kinetic provides a highly configurable environment for the recording and management of time across projects, jobs, service orders, and internal codes. A range of entry options are available, each reflecting the nature of a particular transaction. Time can be entered via web browser when employees are on the go, on the shopfloor, 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 provides the security to help ensure that transactions are properly authorized and backed up by a comprehensive audit trail.


Time Management—Calendar provides clear visibility of missing time sheets entries. The colored blocks indicate the approval status of each time transaction.

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 provides 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 accurate billing to your customers. Manual time and expense reporting processes can be time consuming and 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.
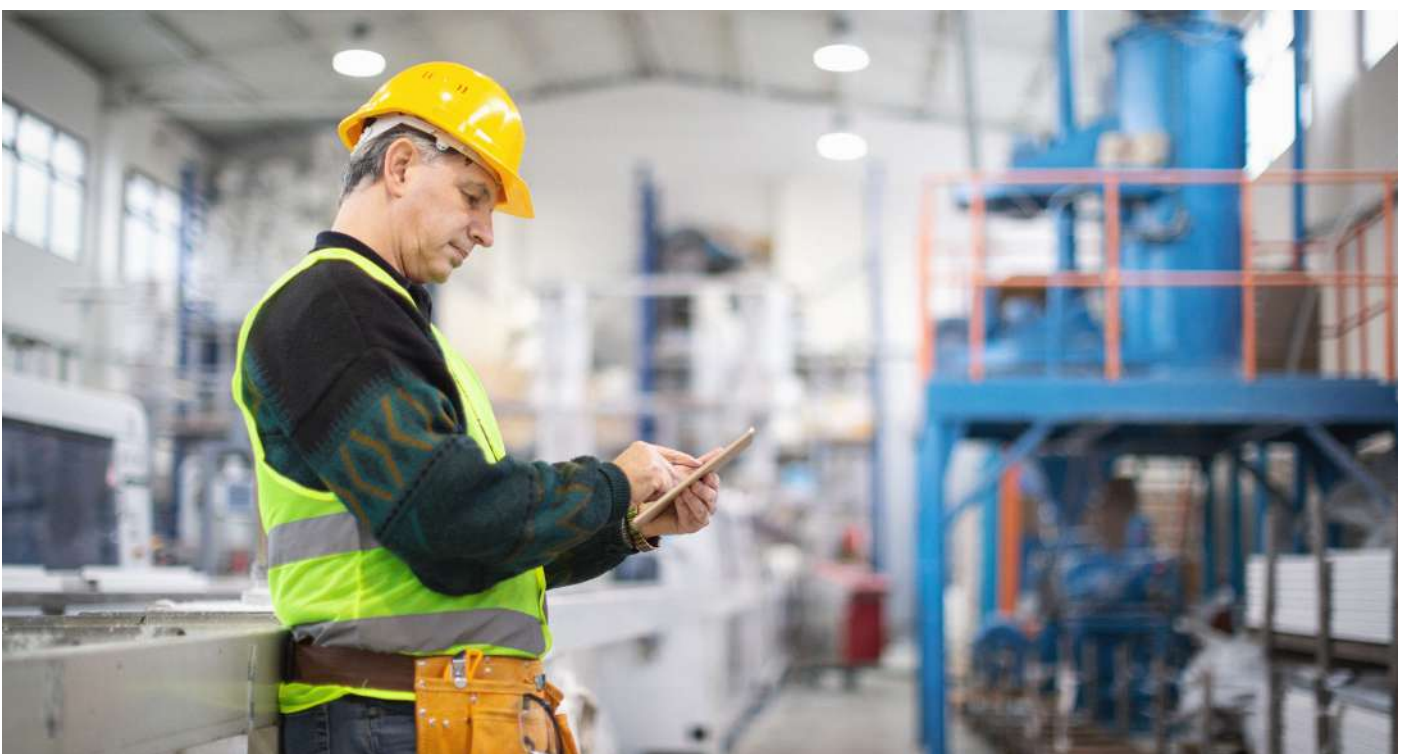
With Time and Expense Management Mobile Applications, you get full control and visibility to make better decisions. Sync back the data in real time to Kinetic, as the applications are an extension of the system. Data flows seamlessly between the different modules like Financials, Project Management into 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.

Create, view and edit expenses or time records when you're offline. These records are saved as drafts in the offline storage, and 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.

Advanced Project Management

Advanced Project Management 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 provides complete functionality to manage projects, contracts, claims, subcontractors, variations, and revenue recognition. Generate efficiencies in your business, improve cash flow and forecasting through effective management, and eliminate manual entries from your revenue recognition process to keep mistakes to a minimum.

The Epicor Advanced Project Management Suite has three modules that can be used individually or together depending on your business' needs:

- Advanced Project Accounting: Manages the financial viability of the projects. Includes Cost Codes, Project Analysis, Project Ledger, and Project Accruals functionality.

- Advanced Contract Management: Manages the financial relationship between the business and the customers. Features include Contract Order Maintenance, Tendering Process/Bid Management, Multiple Billing Types under one contract, Progress Claims and Applications for Payment.

- Advanced Subcontract Management: Manages complex contractual arrangements with subcontractors. Features include Subcontract Order Management, Progress Claims and Applications for Payments and Reports like Subcontractor Commitments, Progress, and Retentions.
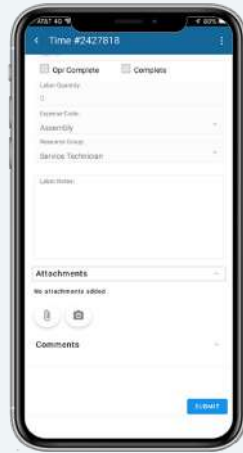
Go paperless by uploading photos and other attachments to the reports.
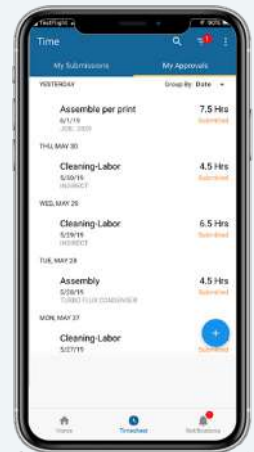
Take control of your expenses on the go.
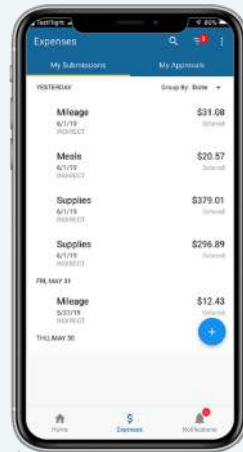
Approvers can see and act on all submitted reports.

Track time and expense anytime from your mobile device.

Planning and Scheduling

- Forecasting
- Master Production Scheduling
- Epicor Smart Demand Planner
- Material Requirements Planning
- Scheduling and Resource Management
- Advanced Planning and Scheduling
- Infinite, Finite and Constraint Based Scheduling

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

Forecasting and Master Production Scheduling

Forecasting and Master Production Scheduling (MPS) in Kinetic are included with the Material Requirements Planning module and are designed to assist manufacturers and distributors with both day-to-day control and long-range planning and decision making. Forecasting and MPS support businesses that operate multiple, mixed-mode strategies simultaneously. Forecasting & 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.

Epicor Smart Demand Planner

Epicor Smart Demand Planner provides 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.

Epicor 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.
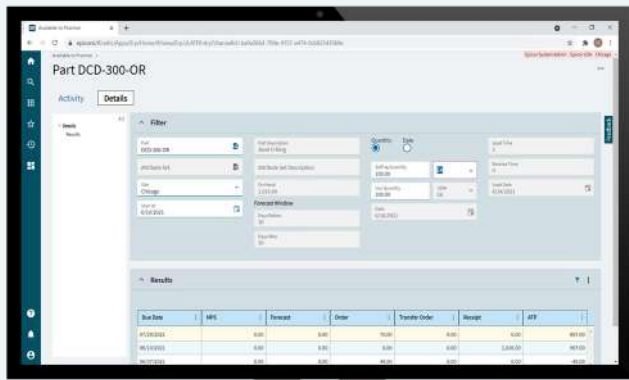
Material Requirements Planning

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

MRP Generation

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

Material Requirements Planning—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. 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.

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

Recycle Jobs

MRP reuses un-firm jobs for optimum MRP performance.

Short Horizon Days of Supply

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

Calculate Manufacturing Lead Time

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

Start Minimum Quantity

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

Bill of Materials Check

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 & 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 re-arrange 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 that they are scheduled together so that all demands were met to meet 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 grouping based on the criteria you define.

Capabilities with Zero Priority

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

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 Advanced Planning and Scheduling module provides the ability to use more than two resource constraints.

Conditional Forward Schedule

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

Resource Group

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

Finite Load Horizon

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

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

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

Rough Cut Scheduling
Keep an eye on the future with Rough Cut Scheduling 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 offset factor that is calculated by number of pieces or a percentage of time allocated.

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

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

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.

Advanced Planning and Scheduling
Available as an extension to Scheduling, Advanced Planning and Scheduling incorporates the strength of

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

Capable-to-Promise
Easily manage customer 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 APS engine then determines, based on the available resources, which individual resource to schedule for the operation.

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

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

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

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

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

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

Advanced Material Planning
Increase throughput by considering material and component availability as a constraint. Advanced material planning, an integral feature of APS, facilitates intelligent stocking and procurement of material requirements. The schedule function recognizes materials earmarked as constraints, gives the master scheduler material availability, and considers supplier calendars for a more realistic schedule.

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

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

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

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

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

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

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

Multisite Management
Not only are manufacturers and distributors looking for new tools to oversee multiplant operations, but they're also looking to maximize the use of existing resources. Alternative production methods management helps optimize the production processes for specific parts in each plant, based on the resources available. Another optimization tool includes the transfer of material or semi-finished components to another plant for completion.

Note: Learn more about Multisite Management in the Global Business Management chapter

Supply Chain Management

- Purchase Management
- Advanced Requisition Management
- Supplier Connect
- Supplier Relationship Management
- Inventory Management
- Advanced Material Management
- Advanced Unit of Measure
- Shipping and Receiving
- Quick Ship
- Warehouse Management
- Supplier EDI and B2B

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 provides effective coordination from initial raw materials to the ultimate delivery of the finished product, transforming your supply chain into a results-driven value chain.

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

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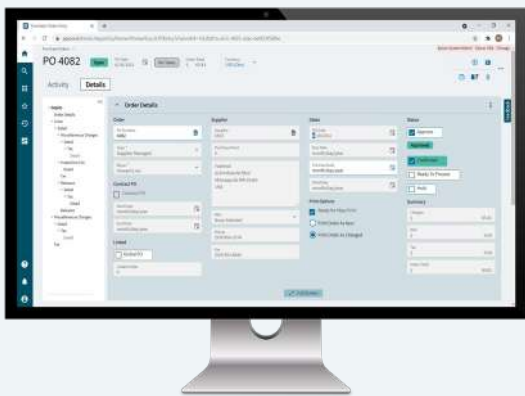
Purchase Management—Enter, approve, and confirm purchase orders with multiple line items and releases.

Purchase Contracts

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.

Advanced Requisition Management

High-performing supply chains maintain a budget and control over items requisitioned for each stocking location for greater efficiency. Advanced Requisition Management (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 supports negotiation of bulk purchase discounts from suppliers, assigns preferred suppliers for particular products, sets the right spend limits for individuals, and assigns the chain of authority for approving purchase orders.

Supplier Connect

Strengthen your competitiveness by offering customers and business partners the ability to interact with your brand online. Supplier Connect or Supplier Portal is a supply-chain-focused feature of Epicor Commerce Connect—a complete, connected, and customer-proven business solution for modern digital commerce and omnichannel enablement 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 Connect eliminates the need for inquiries to come in via email, phone, or fax to significantly reduce 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 store-front and your centralized back-office. This not only provides for a more seamless relationship between you and your suppliers, but 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) provides 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 effectivity dates to be used in other Epicor applications.

Supplier Digital-Integration Suite

The Epicor EDI Supplier Digital-Integration Suite (SDIS) integrates all your suppliers quickly and seamlessly to your business system for visibility and actionable information, regardless of your suppliers' technical capabilities. SDIS can establish and maintain direct integrations to those suppliers who have the capabilities to do so. For those that do not, SDIS provides a web portal to give them the electronic means to respond to your purchase orders and changes in real time, notify you of shipments, and respond to other documents as well. SDIS can also integrate to online buying marketplaces.

SDIS uses a canonical mapping approach for uniform processing of multiple supplier integrations into your system—that means if a change such as an upgrade occurs in your system, SDIS need update only one map instead of many supplier maps. Lastly, SDIS provides a web-based advanced analytics solution that shows you what is happening in your supply chain and provides alerts for non-compliance/unexpected activity for any of your suppliers. The result is integration with all your suppliers for alerts and real-time visibility into orders, carriers, and warehouses, giving your team the ability to respond to breaks in the supply chain immediately.

Note: Refer to the "Cloud Business Architecture" chapter for more information about the Epicor EDI solution for EDI and B2B integration.
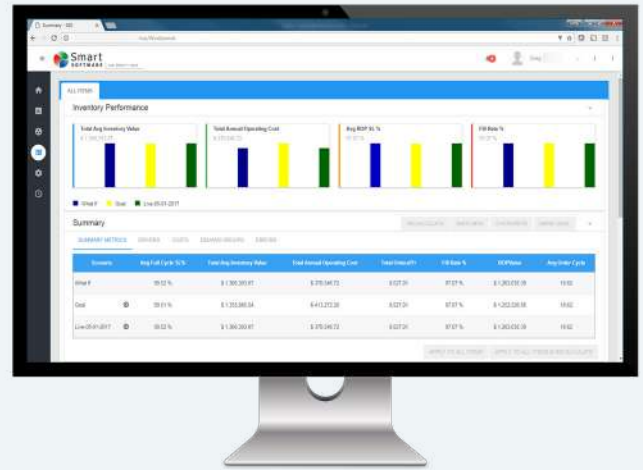
Epicor Smart Inventory Optimization —
Easily visualize your inventory performance
reports and share with key stakeholders

Inventory Management

Inventory Management provides 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 provides a continual update of inventory average, FIFO, lot, or last costs for every item. A variety of screen inquiries provide management analysis of Materials Requirements Planning (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

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.

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.

Shipping and Receiving
The Shipping and Receiving module is designed to promote increased efficiency and accuracy by allowing you to perform and track all activity relating to shipments and receipts. This flexible module gives you the ability to auto-invoice in Accounts Receivable following customer shipment; print customizable bill of lading forms to your shipments; track container shipments 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

Quick Ship
Today's customers have many different shipping options. Quick Ship, a multicarrier shipping software for Epicor 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, Quick Ship communicates with various carriers and provides the information about that shipment back to the ERP platform. As part of the shipping function, Quick Ship prints labels, bill of ladings, and export documents to be included with your shipment.
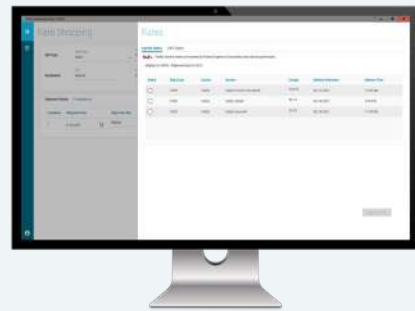
Quick Ship—Quick Ship simplifies freighting and shipment to customer specifications.

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

Warehouse Management

The Epicor Warehouse Management System (WMS) 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. 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.

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

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, and once you consume it, your company legally owns the items.

Smart Inventory Planning and Optimization

Smart Inventory Planning and Optimization is a cloud-based reporting platform for demand planning, inventory optimization, and supply chain analytics that helos drive sales and inventory operations planning.

The platform offers a convergence of robust forecasting methodologies, optimization tehcniques, and consensus demand and inventory planning, delivered via an easy to use web interface accessible through any browser. For more details check the Business Intelligence Section.

Advanced Unit of Measure

Selling items with many dimensional attributes can be complex and make it difficult to implement ERP. For these manufacturers and distributors, Epicor offers Advanced Unit of Measure (UOM) capabilities that reduced the complexity of implementation by reducing the amount of configuration needed to fit these unique needs. The benefit of Epicor Advanced UOM functionality is that it delivers a simplified approach to finding the right inventory by segmenting inventory with 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, ensuring 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. This is powerful and useful in purchasing and selling in one unit of measure while managing inventory and production in another. Advanced UOM delivers 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 Material Management

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

Complete functionality includes:

- Bar coding on demand
- Material handler interface
- Material movement
- Order prioritization
- Sales order allocation
- Bar code tag scanning
- Handheld capability
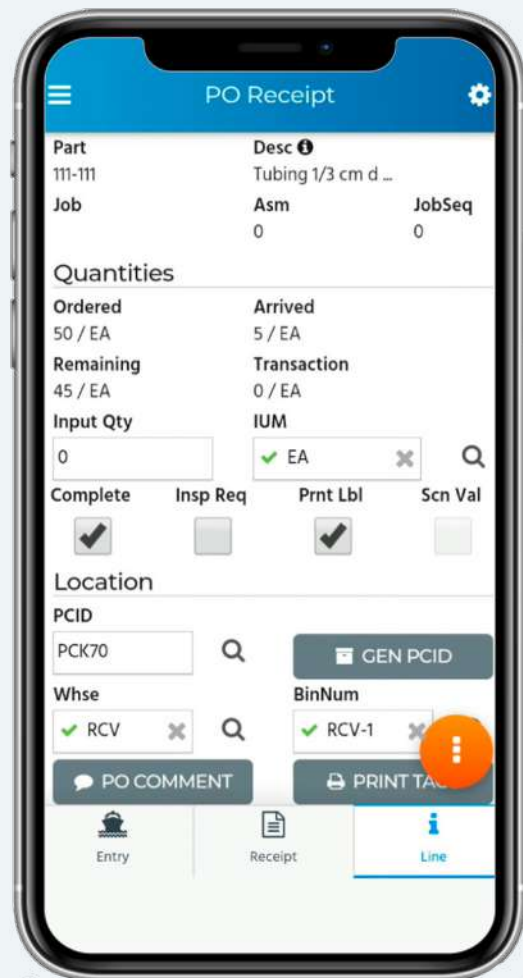
Wireless Warehouse application provides a modern and intuitive user experience on Android devices.
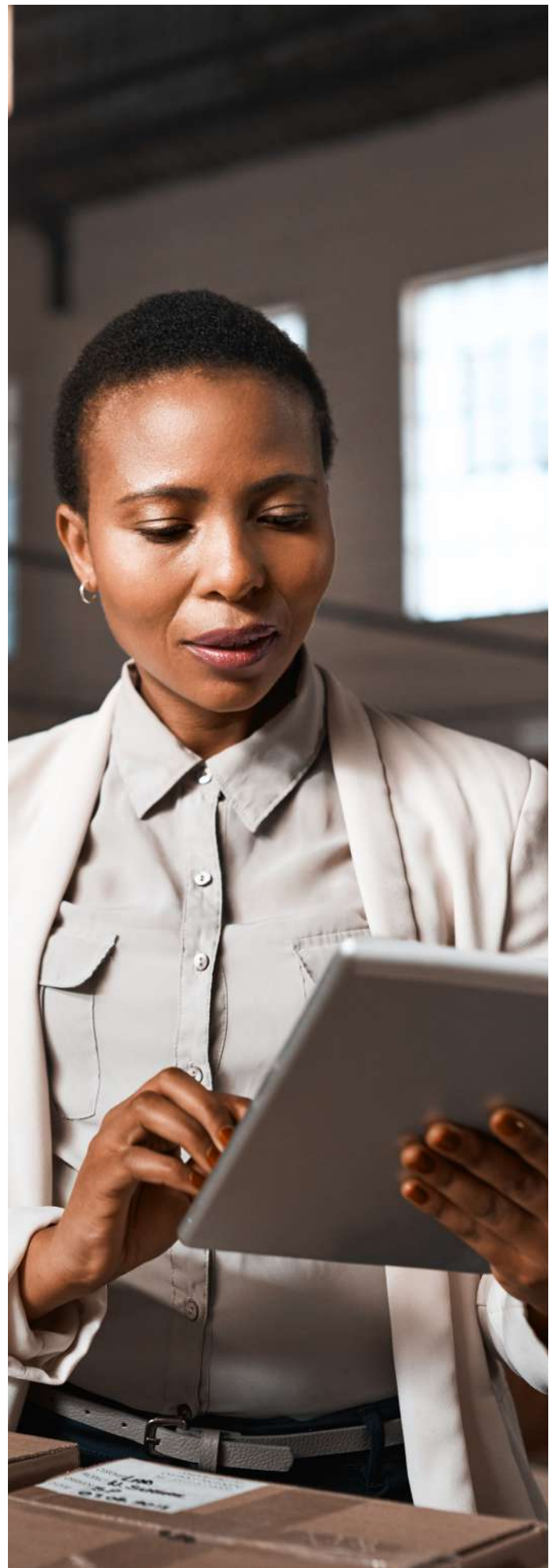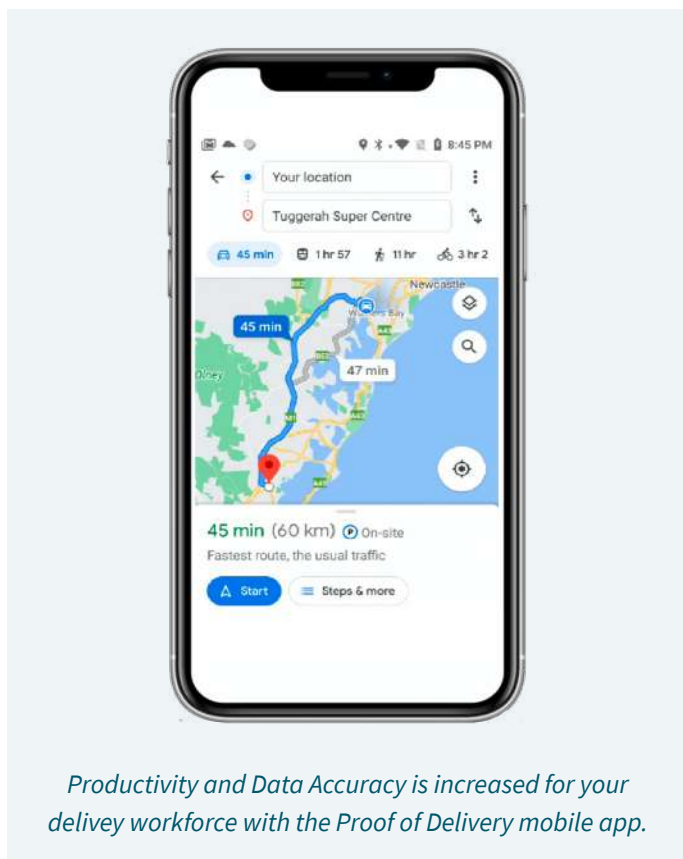
Wireless Warehouse

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

Proof of Delivery

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

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

Production Management

- Job Management
- Advanced Production
- Kanban Lean Production
- Data Collection
- Advanced MES
- Quality Assurance
- Quality Management System

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, Advanced MES, Quality Assurance, Enhanced Quality Assurance, and Quality Management System.

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

Job Manager

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

Production Planners Workbench

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

Job Costing

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

Order-to-Job Linking

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

New/Change Order Notifications

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

Drag-and-Drop Interface

Simplify the planning process. Use a tree interface to easily drag-and-drop components, operations or direct materials from another quote, BOM, or previously run job.
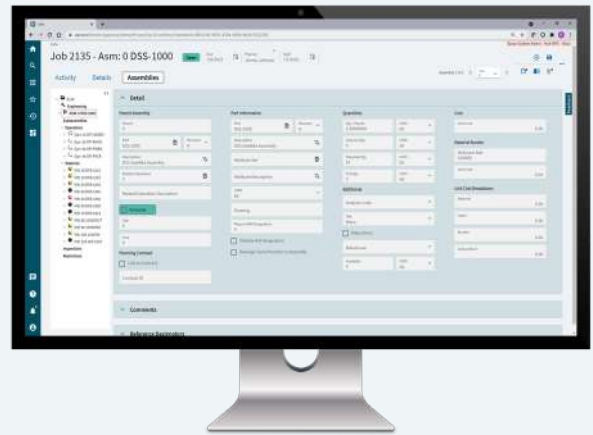
Job Management—Provides detailed information to the plant floor about every aspect of a job.

Planned Overproduction of Assemblies

Produce and auto-receive overproduction quantities to inventory.

Yield Scrap

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

Assemblies

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

Scheduling

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

Backflush

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

Job Tracker

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

Productivity

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

Quality Control

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

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

Advanced Production
Advanced Production deploys batching technology that enables users to group multiple parts or operations together for key production processes. The result of this batching process is a single reporting entity or job for simplified scheduling, tracking, and reporting of labor and materials on the plant floor. 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
Offers simplified production of nested or products of the same material or process in the same production run. Integration to nesting software solutions available with Epicor NestLink, a real-time bidirectional, and 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.

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 provides you with the specific functionality your organization needs to meet these challenges and optimize your plant floor operations, including the adoption of Lean Manufacturing Kanban functionality to pull rather than push products through the manufacturing process.

Lean Production functionality includes:

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

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

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

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

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

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

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

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

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

Support for Hybrid Approaches to Lean
Employ a phased approach to implementing lean practices for tracking material, MRP and Kanban in a mixed environment. By offering manufacturers the choice, at the part location level, how the part will be managed, manufacturers can more easily migrate to lean, while synchronizing MRP and Kanban execution.
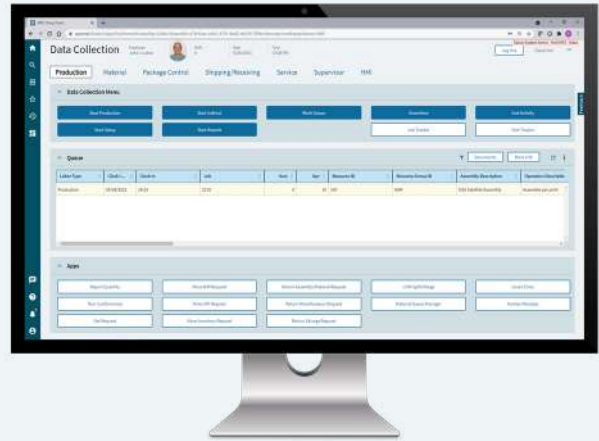
Data Collection simplifies collection of operator data and optimizes production with production queues.

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. Epicor Data Collection enables accurate labor reporting, as well as online transaction tracking, which provides management with a real-time picture of what is occurring on the plant floor by employee and job. Integration with Epicor Job Management, Scheduling, Quality Assurance, and Advanced Material Management eliminates dual entry and provides 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 are 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 Material 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 Material Management module, maximize responsiveness in the warehouse with Inventory functions such as adjustment, material issues, physical inventory counts from within the Data Collection module.

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

Advanced MES
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 Advanced MES comes in. 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 Advanced MES to improve quality, reduce scrap, help ensure on-time delivery, 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.

Advanced MES functionality includes:

*Manufacturing Execution System—
Automatically collect and report the status
of Jobs on the plant floor in real time.*

Deploy Your Way

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

Usability

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 so your MES should be too. 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.

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 before making bad parts. SPC and SQC with factual data 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 Advanced MES system can benefit from the 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.

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 delivers important information in easy-to-digest dials, graphs, and charts. 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 management has what they need to understand tradeoffs, from every angle. Epicor Advanced MES delivers a comprehensive picture of production.

Schedule Optimization

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

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

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.

Quality Assurance functionality includes:

Collaborative Quality

Collaboration among the right resources to improve quality often means redundant communication and events. Using Collaborate with quality groups enables quality events to be resolved faster, and long term quality improves as a result of this collaboration. Quality no longer needs to be an isolated department. In collaboration with engineering, production, and sourcing, quality naturally improves. Cost of quality is also reduced dramatically.

Inspection Workbench

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

Nonconformant Records

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

Non-Netting Bins

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

Discrepant Material Report Processing

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

Corrective Action

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

Material Review Board

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

Cost of Quality

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

Packing Slips

Print a customizable packing slip for all parts returned.

Debit Memos

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

Audit Trails

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

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 and the results for products, groups of products, processes, and other testing.

It offers the ability to define testing elements or attributes as well as lists of attributes to test which can be used to measure against testing results for pass/fail decision criteria. It includes the data used for Statistical Process Control (SPC) and is easily accessed to build SPC analysis. In essence, 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 on-line 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 Epicor 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 Business Process Management (alerting a quality manager about a critical result), performing trends analysis or responding to an auditor request with data pulled from a Business Activity Query or reviewing supplier performance utilizing analysis cubes and dashboards. All the data you need is available with a robust tool set to support 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

Epicor Quality Management System (QMS) by ETQ Reliance® is a cloud-based adaptive quality system that enables manufacturers to optimize the critical quality processes that drive product and service excellence and 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 QMS Base QMS Solution, is the foundation solution, 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:

- Non-conformance reporting
- Delegation and escalation
- Audits management
- Corrective Action (CAPA)
- Document control
- Training management
- Risk register
- Supplier, materials and chemicals
- Inspection and testing
- Return Material Authorizations
- Planned deviations
- Customer feedback

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

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 supply chain management 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 strategic advantage. Automate complaints handling and regulatory submission in compliance with 21 CFR Part 11 and Annex 11 guidelines. Optional validation toolkits and services reduce compliance risk for life sciences businesses.

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.
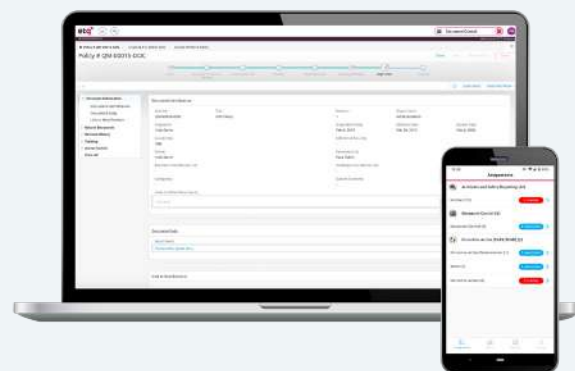
Optimize critical quality processes with Epicor QMS by ETQ Reliance®.

Service and Asset Management

- Service Management
- Returned Material Authorization
- Service Contract and Warranty Management
- Case Management
- Maintenance Management
- Field Service 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 Field Service Management solutions 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 and field staff productivity.

Field Service Management

Service Management 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 offers 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

Fully integrated with Field Service Management, Case Management lets you easily access dispatching field activities and 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.
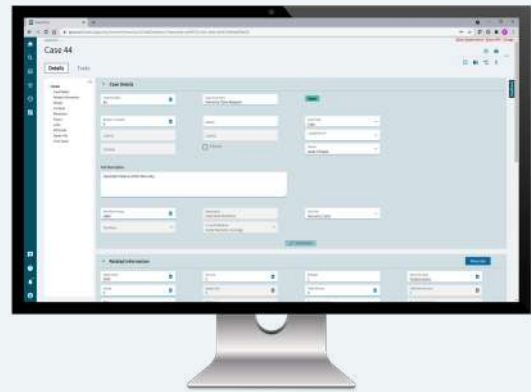
Case Management—Shorten service response time by collecting detailed product problem information and using integrated features to initiate requests to the appropriate resource.

Maintenance Management

Maintenance Management provides 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. Base maintenance plans 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. 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.

Epicor Service Pro

Enhance productivity of field operations with mobile automation and integrated information flow. Connect your office and field staff with the information and processes they need to satisfy customers more efficiently.

Service Pro is a comprehensive, cloud-based service management application integrated to Kinetic, that helps organizations improve enterprise- wide field service management and increase mobile field workforce efficiency. From a single application, manage all field service activities—from calls, work orders, and assets, to warranties, scheduling, service contracts, and parts.

Service Pro is most often used by manufacturers who service equipment, machinery, infrastructure, or other products at customer sites. With its visualscheduling capability and connected mobile app, a call taker or dispatcher can easily find the closest qualified technician who is available for the work assignment within the ETA window called for by the service level agreement. Additionally, they have visibility into all other scheduled and unscheduled appointments in their region to quickly identify opportunities to minimize travel time—for example, performing a planned maintenance task after completing a nearby repair.

For companies with advanced scheduling needs or very large technician teams, Service Pro Optimize can intelligently advise and automatically schedule work assignments based on the customer's most important criteria.
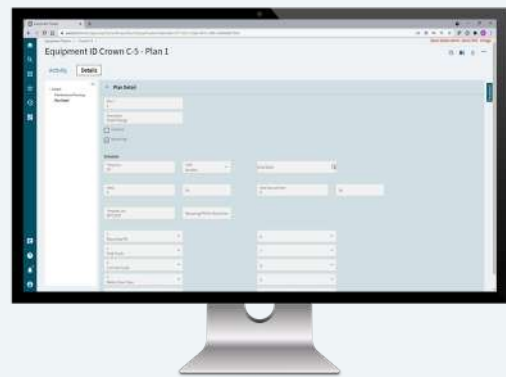
Maintenance Management—Maintenance technicians record events and resolution at the point of work.

Service Pro Mobile

Help improve customer satisfaction, increase field service technician utilization, and boost enterprise service efficiency with a proven cross-platform mobile field service application. If you're looking to truly automate your field service organization, a mobile app with offline functionality needs to be a priority.

Service Pro Mobile features include:

- Technician Status and Labor Time
- Mobile Asset Management
- Warranty and Contract Visibility
- Spare Parts/Inventory Tracking
- Task Management
- Service History
- Photo and Signature
- Inspections
- Segments

If you're looking to truly automate your field service organization, a mobile app with offline functionality needs to be a priority.
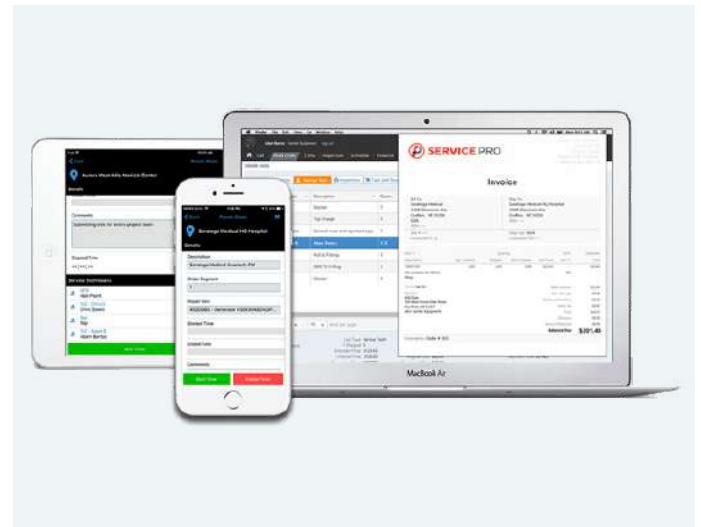
Human Capital Management
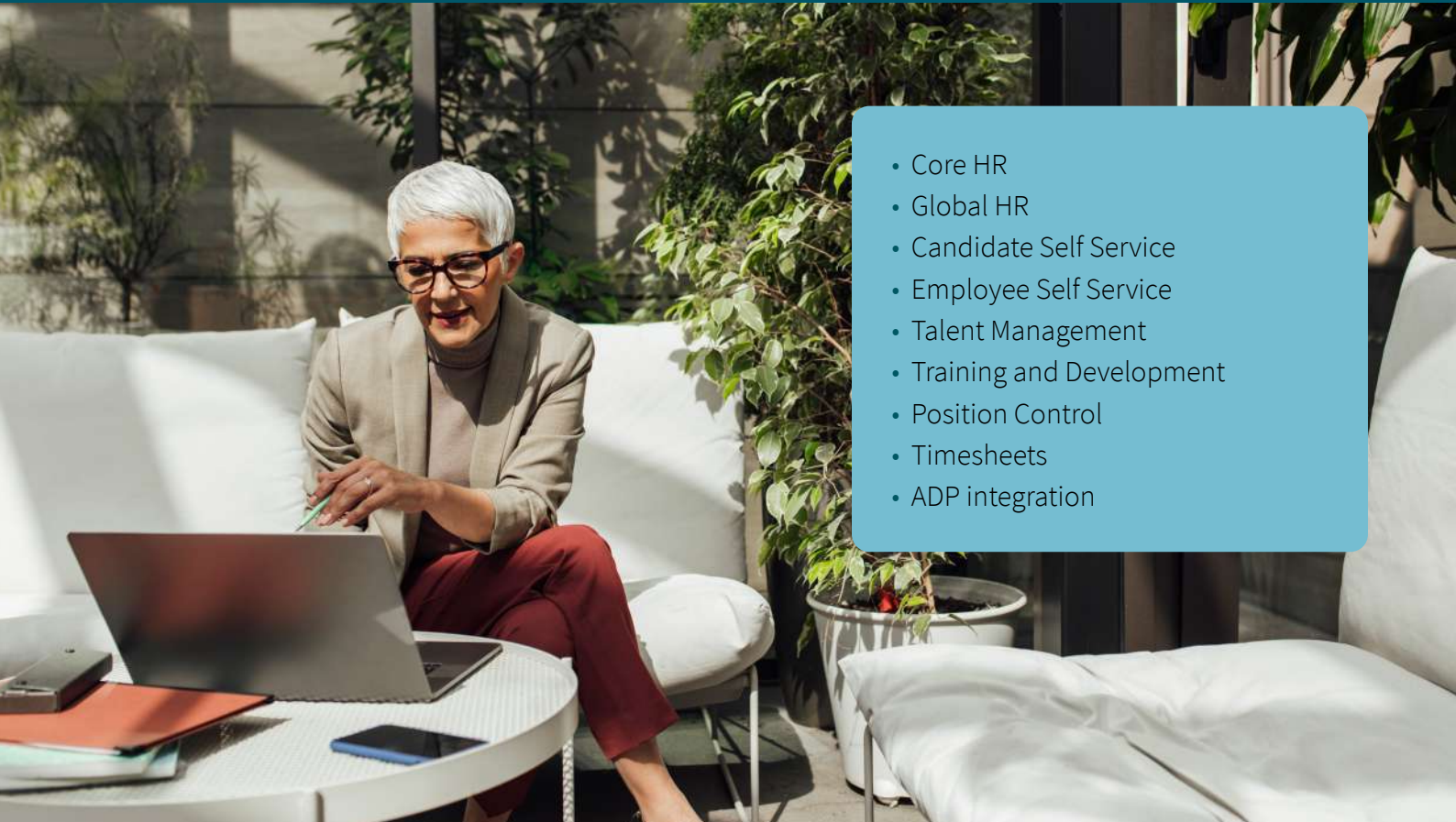
- Core HR
- Global HR
- Candidate Self Service
- Employee Self Service
- Talent Management
- Training and Development
- Position Control
- Timesheets
- ADP integration

Talent shortages and the changing nature of employment mean people must come first—even in the digital world. Businesses will not grow without a culture of growth that willingly embraces innovation and tackles game-changing initiatives. That means companies must help ensure employees feel inspired, productive, valued, and rewarded. Herein lies a powerful opportunity for HR professionals to help their organizations navigate the talent pursuit, take a leadership role in digital transformation, and guide the way forward. Epicor is ready to partner with you in this journey.

Epicor Human Capital Management (HCM) comprehensively automates HR functions from recruitment to retirement in a single software system, enabling you to track, manage, and analyze all data for your employees. Through automated workflow, you can improve your efficiency. With powerful reporting and analytical tools, you gain greater visibility into your company's workforce for better strategic planning. With seamless integration to your Kinetic (ERP), you gain a more complete view of your employees.
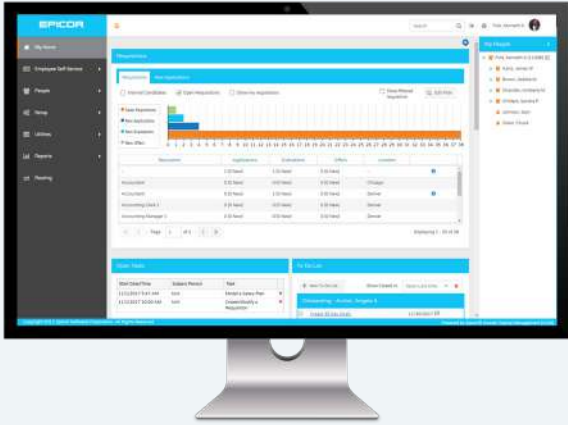
Core HR—Epicor HCM helps you manage employees from recruitment to retirement, and it all starts from an easy-to-use home page that users can personalize to complete tasks faster.

Core HR

HR professionals increase their value to the organization by helping decision-makers navigate workforce change. Access to accurate information is essential. The Epicor Human Capital Management software maintains your employee-related data in a single database—a true HR system of record that enables you to support your organization's strategic initiatives.

Usability

Epicor HCM offers a highly intuitive user experience, which enables users across all roles—including candidates, applicants, HR professionals, employees, and management—to quickly learn and adopt the system throughout the organization. Inspired by consumer software, Epicor HCM allows you to instantly navigate anywhere within the solution—you can launch new activities worry-free with the Epicor HCM auto-save feature, and the software notifies you if you miss a field in a task.

Epicor HCM has a powerful home page that serves as the launch pad for everything you and your users regularly do in the system. HR department users and administrators, business managers, and employees can personalize their home pages with their favorite data fields and tasks. With the Epicor HCM home page, everyone can securely and quickly complete their assigned tasks—improving overall efficiency.

Reporting

Through graphs and charts, you can analyze applicant and employee data to better manage your workforce and improve strategic planning. You can analyze costs of turnover and hires, predict effects of salary increases, monitor salary increases against performance ratings, keep tabs on equal employment data, compare benefit programs, and much more. Epicor HCM provides a complete picture of your company's workforce for better strategic planning. Epicor HCM offers over 150 standard reports, including:

- Absence accrued cost by department
- Annual recruiting budget
- Applicant requisitions
- Qualification match
- Cost per hire
- Benefit statement
- Benefit enrollment by person
- EEO
- Drug test history
- Total compensation statement
- Audit report

  U.S. Compliance includes:

- Affordable Care Act (ACA)
- Equal Employment Opportunity (EEO)
- Affirmative Action Plan (AAP)
- Veterans Employment and Training Service (VETS)
- Family Medial Leave Assistance (FMLA)
- OSHA Logs
- COBRA
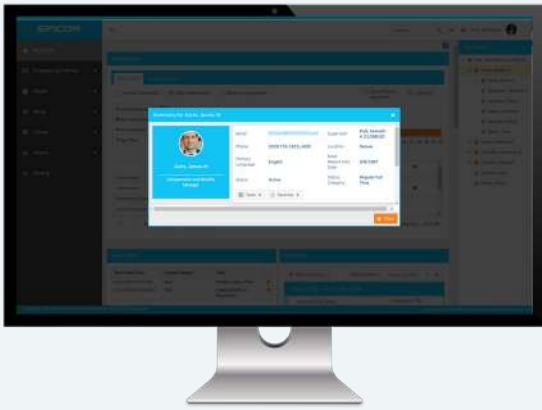
Usability—Epicor HCM offers a pleasant user interface that expedites task completion, improves productivity, and supports employee satisfaction.

Integrations to Kinetic

Epicor HCM is integrated with Kinetic to help you collaborate on critical employee information through a more expedient and secure process. This integration simplifies your technology landscape by maintaining a single source of truth for employee leave,

Approved requests for paid time off (PTO) can be shared from Epicor HCM to Kinetic to give managers visibility to employee availability directly from within the ERP scheduler. Managers have the ability to create rules around PTO requests using workflows to help ensure they have appropriate coverage for any given period of time. An employee's actual time worked flows back into the HCM solution from Kinetic, allowing HR to run scheduling, payroll, and ultimately close the loop.

Absence Points System

Support your absence and tardiness policies digitally with the absence points system in Epicor HCM. This system provides an integrated means to correlate absences with points and corrective action thresholds, making it easier to track and enforce on- time employee attendance.

Analytics

Epicor HCM integrates with Epicor Data Analytics (EDA) for a modern view of workforce insights to drive more informed decision-making for HR professionals. EDA provides interactive dashboards of HR information so you can easily review, understand, and act upon data. Its reports, graphs, charts, and filters are designed to be very user-friendly so that any team member can build and modify dashboards to fit their role. Types of HCM data that can be viewed as a dashboard with Epicor Data Analytics include:

- Absences
- Benefits
- Applications
- Requisitions
- Recruitment
- Qualifications
- Health and Safety
- Terminations
- Compensations

Global HR

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

Select countries only. Contact your Epicor sales representative for more information.
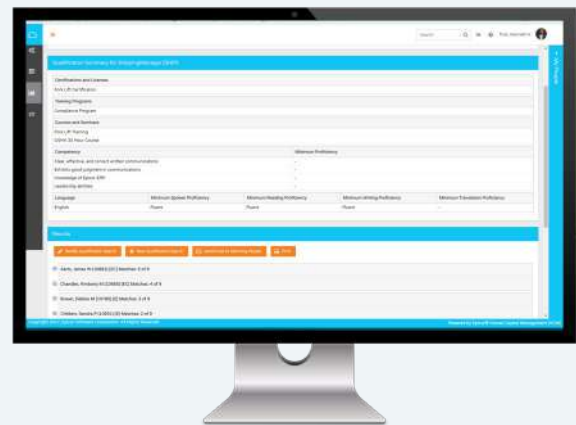
Candidate Self Service—Quickly identify potential candidates for your open positions.

Candidate Self Service

Epicor HCM gives you the tools you need to help you make the best possible hiring decisions and eliminate paper processes. Intuitive tools assist HR and hiring managers with workflows that walk you through the most common recruiting tasks—opening a requisition, interviewing, and hiring. Candidate Self Service allows individuals to submit online applications which are

automatically connected to your HCM system and flow seamlessly to HR and hiring managers. Coupled with Core HR, .this solution helps recruiters approve requisitions, filter applications through qualification matches and knockout questions, keep statuses updated, and record comments throughout the hiring process, shorten your recruiting process and control costs.

Recruitment functionality includes:

- Requisition management
- Job board integrations
- Skills search
- Job-opening cost tracking
- Evaluation tracking
- Drug-test tracking
- Onboarding

Mobile Candidate

Today's workforce is on the move and increasingly digital-first, so you need pragmatic tools that will attract tech-savvy talent. One of the mobile offerings in Epicor HCM, Epicor Mobile Candidate extends recruiting to reach more applicants for less through an innovative mobile portal.

Mobile Candidate—Reach more candidates for less with an innovative mobile portal that extends recruiting by allowing applicants to search your job openings and apply via mobile devices.
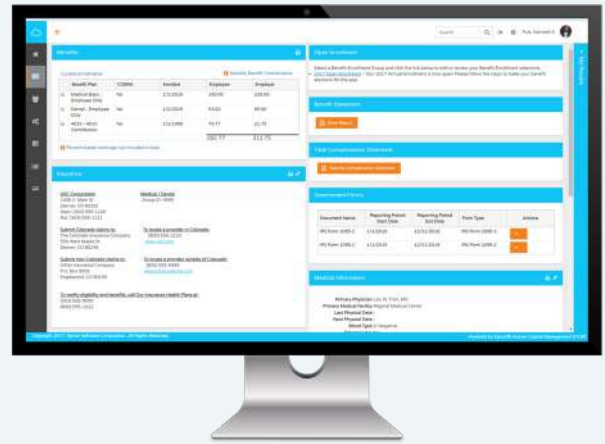
Benefits Management—Epicor HCM makes benefits administration easier with simple solutions, such as a data feed to your carriers using a Section 834 format, to eliminate duplicate data entry and reduce enrollment errors.

Employee Self Service

Adding employee self-service capabilities to your HR delivery methods is key to employee engagement, streamlining processes, and increasing service responsiveness across the organization. Epicor HCM Employee Self Service, creates a dynamic HR communication portal with easy-to-access information for employees at all levels of your organization. Allow employees to access their personal information whenever they like, find answers to common HR questions, manage benefits, view openings, and more.

Benefits Management

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

Key features include:

- Online open enrollment
- Online enrollment for life events
- Unlimited benefit plans and options
- Electronic signatures for benefit changes
- Rules and eligibility criteria
- Premium payment and employee contribution tracking
- Benefit cost and usage tracking
- Separations and continuation of coverage

Absences

The impact and cost of employee absences to the organization can be very high, which presents an opportunity for driving out costs and demonstrating the return on investment (ROI) of HR programs. The absence-tracking features in Epicor HCM enable you to manage employee absences online to help control those costs.

Talent Management

Organizations are increasing focused on retaining valuable employees through skills development, rewards, and employee satisfaction initiatives. Epicor HCM helps HR leaders define and leverage competency models that jumpstart talent management initiatives as part of a comprehensive HCM strategy. Functionality includes:

- Goal management
- Cascading goals
- Journaling
- Configurable appraisal documents
- Skills gap analysis
- Job Needs
- Competencies and certifications

Performance Management

Performance management can be a powerful method to motivate employees, prioritize objectives, and focus organizational efforts on common strategic initiatives. With Epicor HCM, you can align corporate goals with employee performance while empowering managers to consistently monitor employee performance throughout the year. The 360-degree or traditional performance reviews facilitate the process of evaluating employees and reduce the cost of tedious paper-based appraisals.
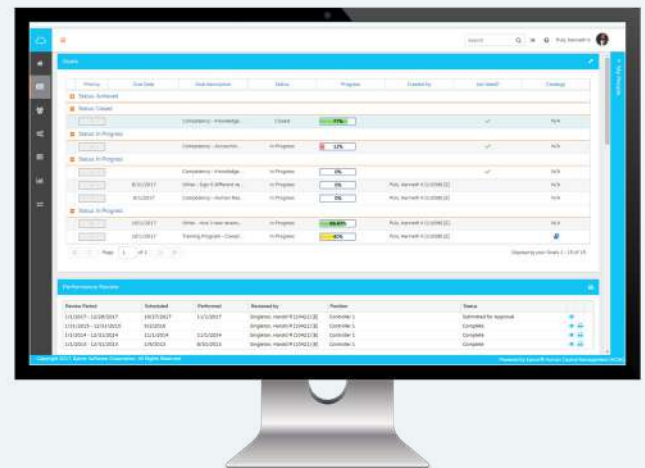
Performance Management—Align your organization from top to bottom on common goals that focus on achieving strategic objectives. Reduce the cost of tedious paper-based reviews with a 360-degree view of performance that encourages consistent feedback.

Talent Assessment

Epicor HCM offers a highly visual and detailed method for exploring the talent potential of your employees. The Employee 9-Box Talent Matrix allows you to evaluate your employees in terms of current contribution to the organization and their potential, as mapped out in a matrix format. This 9-box matrix is an especially useful tool to quickly evaluate your organization's talent pool, track an employee's career trajectory, identify potential leaders, anddetermine top candidates for coaching or mentoring.

Compensation

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

Salary Planning and Administration

The Epicor HCM salary planning and modeling tools enable HR to create plans on a defined budget, which managers can use to model various salary distributions among their employees. Upon submission, HR can route plans through the proper channels. Once plans take effect, HR can create a single view of your compensation strategy for the executive team. Empower managers to directly request salary changes for their employees through Epicor HCM. Requests can be routed through the proper channels for approval, and use electronic signatures for documentation. Routed requests can even be conditional (e.g., if a change is more than 3%, it requires executive approval; if it is less than 3%, it only requires department head approval) and requests may be edited by the approving authorities during the process.

Training and Development

The Epicor HCM Training and Development module allows you to track a comprehensive training history on your employees so you gain a better understanding of the knowledge, skills, and abilities employees have added to their personal profiles, as well as any additional learning opportunities that may interest them. Encourage a culture of growth and opportunity among employees by empowering them to take control of their own career development.

Position Control

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

Timesheets

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

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 create a file pre-formatted and ready for submission to ADP.

Kinetic is integrated with the ADP payroll solution and can also be integrated to third party payroll providers. The Kinetic Payroll module is available as an optional module within Kinetic. The Payroll module can work with the Automated Clearing House (ACH) payment capability as well as the General Ledger (GL).

- Reduces the staff hours needed to process payroll
- Automatically creates file format ready for submission
- Improves productivity in processing payroll
- Helps to meet critical payroll deadlines
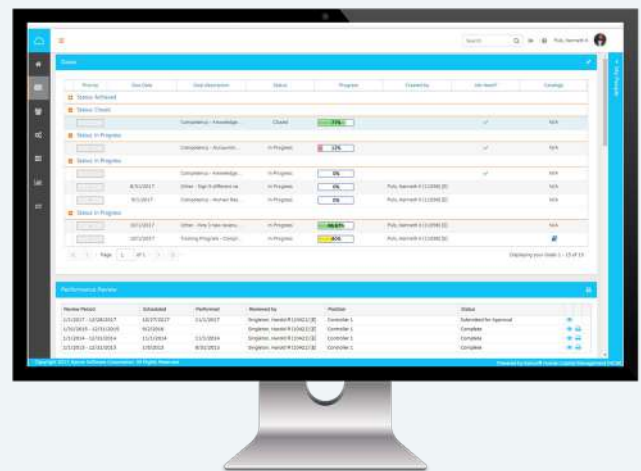
Training and Development—Allow employees to schedule and track training requirements with an easy-to-use calendar view.
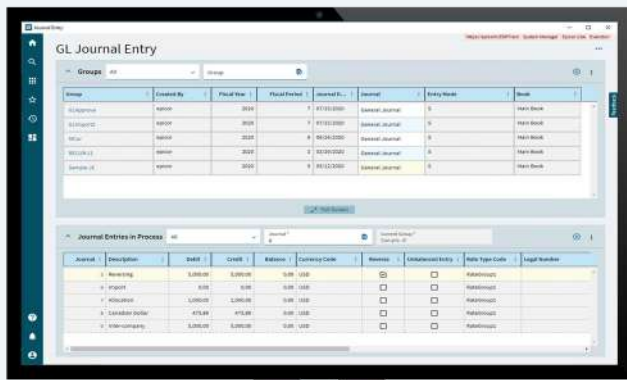
Financial Management
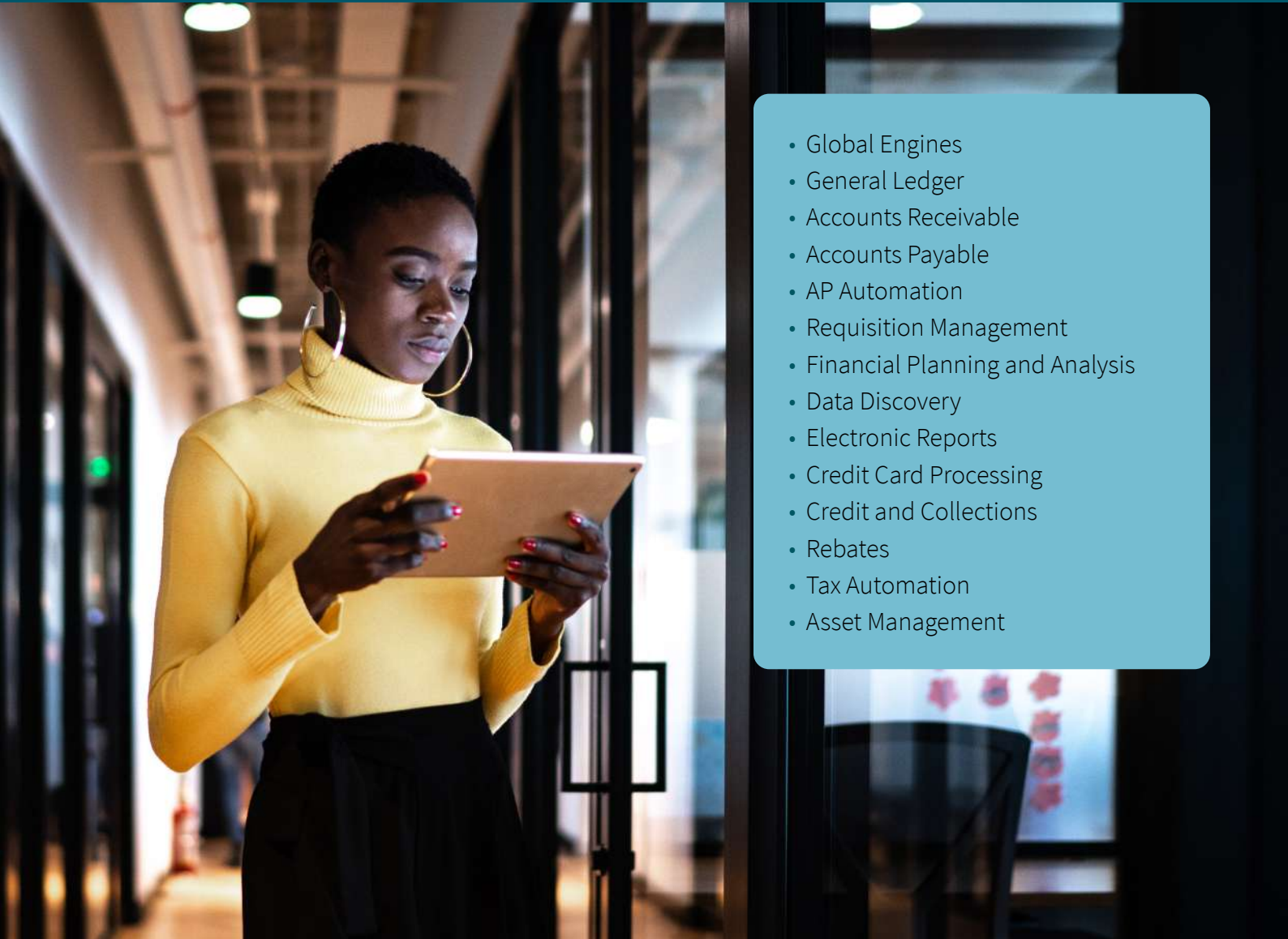
- Global Engines
- General Ledger
- Accounts Receivable
- Accounts Payable
- AP Automation
- Requisition Management
- Financial Planning and Analysis
- Data Discovery
- Electronic Reports
- Credit Card Processing
- Credit and Collections
- Rebates
- Tax Automation
- Asset Management

Financial Management 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. Financial Management gives you access to real–time fiscal information and provides the modern platform you need to support business around the world.

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

Global Engines

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

At the heart of the Epicor solution, 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

General Ledger (GL) is the heart of Financial Management, processing and posting all accounting transactions created throughout Epicor applications, as well as entries made directly within the ledger. The information and controls which flow from the General Ledger system enable an organization to operate efficiently, comply with fiscal regulations, underpin strong corporate governance, and drive enterprise performance. This powerful GL application provides the accounting controls and system security necessary to help ensure the integrity of your company's financial data.

Multiple Books

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

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

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

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

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

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

Chart of Accounts

Financial Management allows up to 20 user-definable segments within the chart of accounts (COA). These can be used for accounting and reference purposes providing the ability to record, store, allocate and report on important financial data at a highly granular level. With a total of 200 characters available, Epicor gives you the flexibility to manage your financial operations exactly as you need.
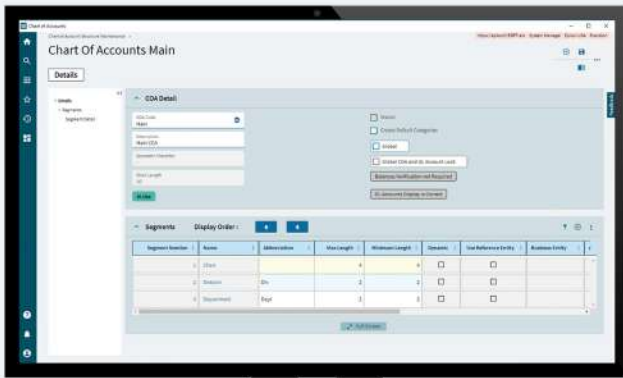
The Chart of Accounts program allows to have multiple chart of accounts with dynamic accounting segments that are customizable in the system.

Balance Controls

Financial Management allows users to define the frequency at which balances on accounts are captured and stored. Often used to facilitate the calculation of Average Daily Balances, 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

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

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

Advanced Allocations

Automation and control of repetitive processes is one of the major benefits of using a Financial Management Suite.

Advanced Allocations automatically computes cost and revenue allocations and the resulting journal calculations, streamlining processes, increasing relevance, and improving accuracy. This results in shorter close cycles and more accurate financial statements.

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

- 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 transitions in the ERP system as well as performing manual allocations.

Complete Cash Management functionality includes:

- Bank statement processing
- Fuzzy logic automated reconciliation
- Soft formats for EFT
- Petty cash management
- Cash flow dashboards
- Credit card processing
- Integration with industry-leading providers
- Supports industry standards to reduce fraud
- Flexible configuration
- Transaction flexibility
- Reauthorize reservation transactions
- Transaction reports
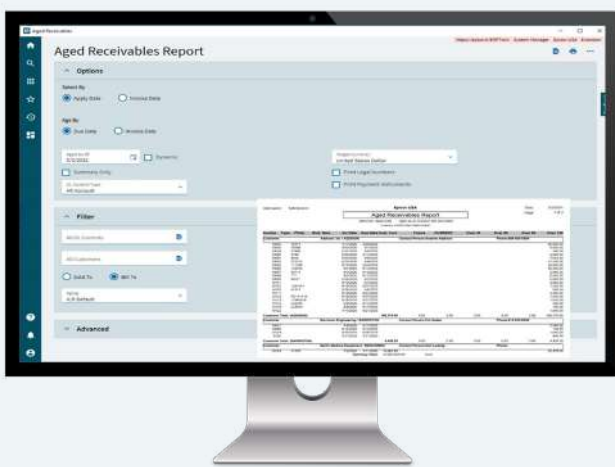
The Aged Receivables Report has multiple parameters and it provides a detailed overview on the outstanding customer invoices.

Accounts Receivable

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

Invoice Entry

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

Debit Notes

Ability to record Debit Notes (Chargebacks) sent from the customer. Debit Notes may now be entered as part of the AR cash receiving process, and will then have their value applied as part of the settlement process. The Debit Notes may be related to specific invoices or remain unassigned.

The new Debit Note will remain as an open receivable until matched to a credit memo or The new Debit Note will remain as an open receivable until matched to a credit memo or subsequently paid. In addition, Debit Notes sent by customers can be recorded independently of the cash receipt process - for example, electronically received payments. They can then either be applied or produce an unapplied cash value.

Interest Invoices

Create and apply interest invoices to manually charge an interest amount to an overdue or late-paid invoice. Select a customer and choose the single or multiple invoice lines against which to generate the interest invoice. Additionally, finance charges on invoices can be generated against a customer's overdue invoice balance. Users have the ability to include or exclude the impact of credit memos when calculating finance charges.

Multiple 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.

Invoice Logging and Numbering

Logging allows the recording of invoice details with applicable input tax while the invoice is in the process of of review and approval. This allows you to reclaim the input tax in a timely fashion, where such practices are allowed. When an invoice is created, users have the flexibility to allow the system to automatically generate invoice numbers or you can manually enter numeric or alphanumeric invoice numbering schemes at the invoice type level.

Aging Information and Customer Reminder

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

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

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

Manual Selection of Invoices

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

Credit Manager Workbench

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

National Accounts (HQ Accounts)

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

Flexible Tax Engine

Epicor Financial Management contains a feature-rich flexible Tax Engine which allows businesses to configure Epicor applications for local and international financial reporting standards, as well as unique local tax jurisdictions. Tax 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, which are based on existing reports such as the EU Sales List, Intrastat and Tax Reporting. You can then reformat generic reports to meet your local requirements.

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

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 Kinetic 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 eliminate 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 Kinetic, supporting the Bank of Boston, Chase, Fleet, Union Bank, and Wells Fargo systems.

By customizing the standard formats, it is possible for any Kinetic 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 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 Kinetic Payroll module, so transfers to employees, such as expense reimbursements, government benefits, tax refunds, interest payments it's fully automated.

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

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

Advanced Requisition Management (ARM)

Stay on budget and manage spend limits with automated processes and flexible multi-dimensional approval workflows – utilizing Advanced Requisition Management (ARM) for Kinetic. ARM was built to extend the requisition and purchasing functions within Kinetic. It has tight real-time integration hooks with your Kinetic system, giving your staff a seamless experience when it comes to the Kinetic data that ARM uses and the transactions it creates.

- All or part of the inventory items can optionally be available in the ARM catalogue

- Purchase requests can be processed for Epicor jobs and projects

- 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 create a Request for Quote (RFQ) for suppliers to invite them to bid on your purchase request

- Access or 'punch-out' to a suppliers web store and add items to the suppliers shopping cart

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

Financial Planning and Analysis

Epicor offers multiple products for FP&A enabling all businesses of different types and sizes to select their best option. All these solutions support both on-premises and cloud deployed Kinetic systems, helping our customers to travel through the journey of migrating their Kinetic system to the cloud exactly when required by their business. Besides FP&A, each of these solutions provide financial reporting.

Epicor Data Analytics (EDA) is a fully cloud-based, powerful Business Intelligence (BI) product with remarkable data visualization and drill down capabilities. This product runs on any modern web-browsers, shortening the learning curve to a minimal level. EDA can generate financial statements that you can save in Excel format, and it can also manage your budget planning activities.

Spreadsheet Server 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 Capture Data Change (CDC) capability built-in to Kinetic 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 Kinetic systems.

Epicor Financial Planner (EFP) is a robust financial budget planning solution for larger enterprises, featuring both an Excel add-in and a web-based user interface, having multiple content packs, supporting C-level decision makers with elaborating sophisticated scenarios, consolidations and more.

Epicor Data Analytics (EDA) Financials

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

EDA 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 created, 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 when 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

EDA 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 an manage, business leaders can plan their budgets in many ways with custom calculations, 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 EDA as a data stream, while supporting the rolling forecast approach. Looking at forecast charts, if business specific new external effects or events arise that potentially may affect the company revenue, change the expectations by a drag-and-drop movement easily or move sliders on Key Performance Indicators (KPI) such as EBITDA – all this in a simplified web-based interface.
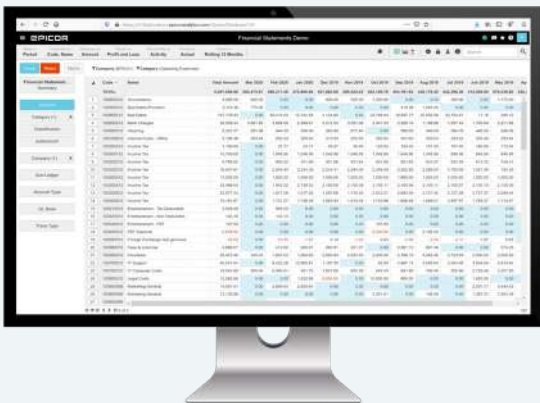
The Financial Statements module in Epicor Data Analytics (EDA) is a powerful financial reporting solution - available in a web-browser. Export reports in MS Excel format any time from anywhere.

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.

Spreadsheet Server

Spreadsheet Server is a robust, performanct Excel-integration product for financial reporting. Amost all finance experts work with Excel and make calculations that help with their every-day, financial operational reporting.

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

- 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 Kinetic ERP systems. The Cloud Connector has a great reporting database that uses the Epicor developed Change Data Capture (CDC) feature to provide frequent data updates and achieve a near real-time reporting experience. Spreadsheet Server also supports on-premises deployents with ODBC connections.

Epicor Financial Planner (EFP)

Epicor Financial Planner (EFP) is a fully cloud-based solution for financial planning and analysis. EFP features a web interface with a clear design that is available from multiple mobile devices, while the Microsoft Excel add-in helps with a more sophisticated data entry using the functions, conditional formatting or even charting for representing data.

All the models, budget plans, scenarios and the data extracted from the ERP system are stored on highly reliable cloud servers.

By being connected to the data in your ERP system, EFP has the ability to pull in information—such as previous actuals—in order to carry out comparisons and utilizes them in the spreading function. This makes it incredibly simple and intuitive for planners tasked with carrying out budgeting tasks, freeing them to concentrate on value added tasks. Optional packages extend EFP with cash flow analysis, capital expenditure (CAPEX), profitability analysis, consolidation, sales budgeting and more.

- Microsoft Excel toolset
- Integrated budget approval workflow
- Pre-built templates
- In-built security
- Real time collaboration
- Live forecast
- Financial and operational models
- Drill down and drill through

Epicor Financial Planner (EFP) is a robust financial budget planning and reporting solution both with an Excel add-in and a web-based view, especially good at tackling very complex calculations and scenarios, e.g. consolidations.

Data Discovery

Data Discovery is the data visualization tool built into Kinetic. Driven by real-time Business Activity Queries (BAQs) in Kinetic and other data sources, 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
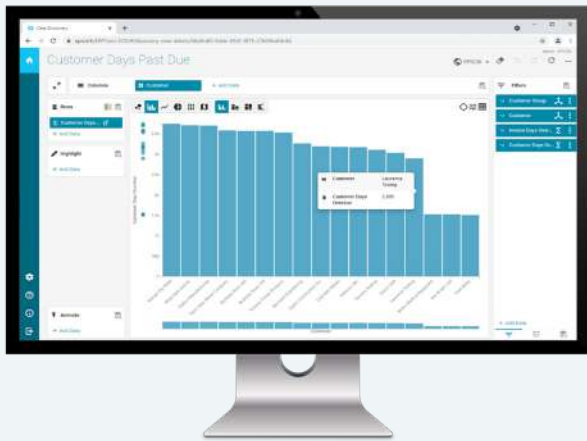
The Customer Days Past Due dynamic dashboard in Epicor Data Discovery (EDD) is a great visualization of customer invoices that still need to be paid.

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 deliver data report files in diverse formats such as XML, JSON, PDF and more.

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 any areas of the Kinetic system, but this module is mostly used for financial data reporting such as GL transactions, Chart of Accounts, balances, electronic VAT reports, 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. The Epicor Country Specific Functionality (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 (CSF)

When expanding your business to new regions or countries, the Country Specific Functionality packages provide access to a range of functionality required either by law or by a specific industry or by a widely used local process. The CSF packages are developed, tested and released with each Kinetic release ensuring a seamless experience for any users in the given country.
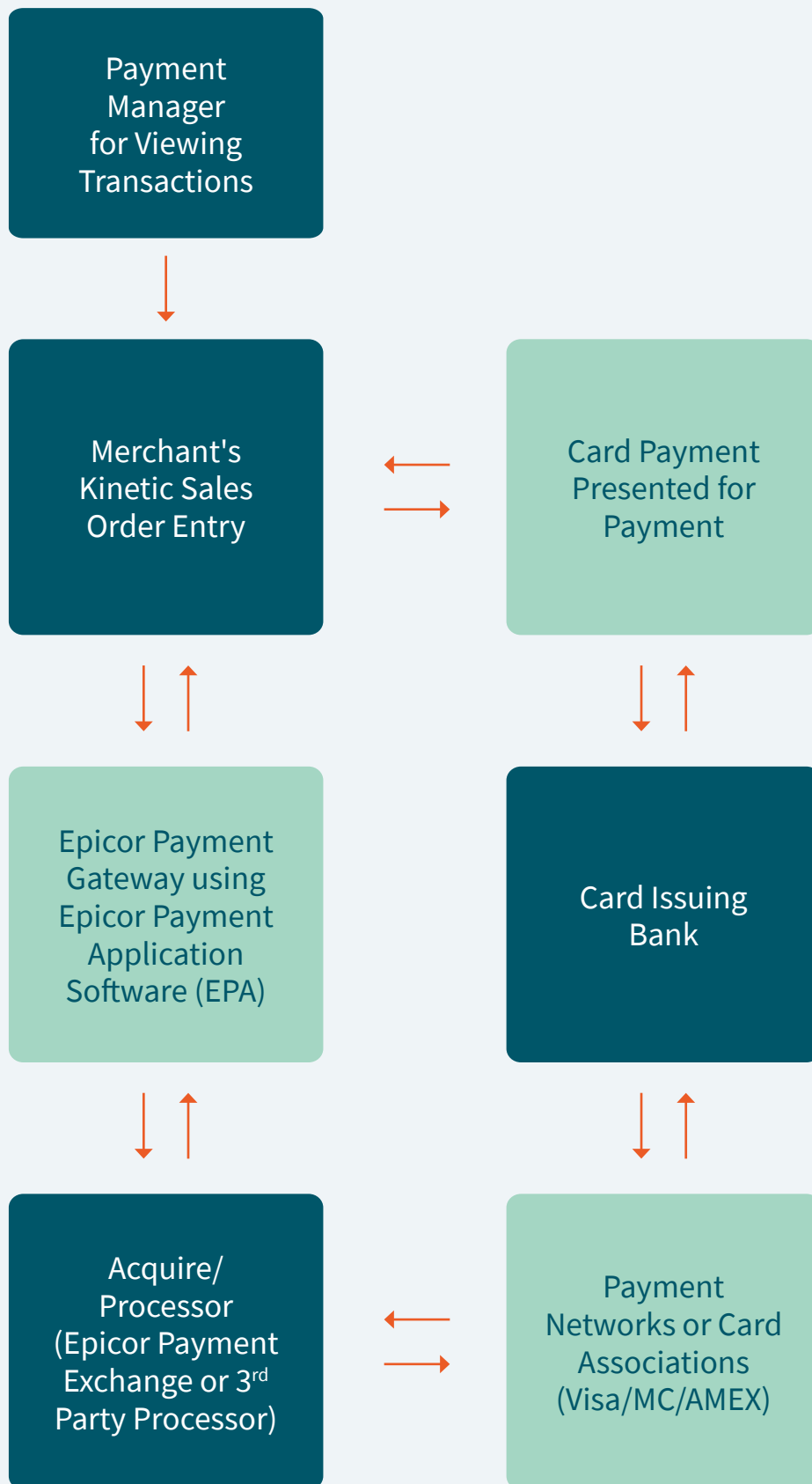
The CSF packages can be purchased separately for each country and these contain detailed documentation on the configuration of the add-on functionality included.

The user adoption and learning cycle of a CSF package triggers minimal efforts, 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.

- 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
- Same release cadence as Kinetic
- 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

```
┌─────────────────────┐
│ Payment Manager      │
│ for Viewing          │
│ Transactions         │
└──────────┬──────────┘
           ↓
┌─────────────────────┐        ┌─────────────────────┐
│ Merchant's           │   ←    │ Card Payment         │
│ Kinetic Sales        │   →    │ Presented for        │
│ Order Entry          │        │ Payment              │
└──────────┬──────────┘        └──────────┬──────────┘
      ↓         ↑                     ↓         ↑
┌─────────────────────┐        ┌─────────────────────┐
│ Epicor Payment       │        │ Card Issuing         │
│ Gateway using        │        │ Bank                 │
│ Epicor Payment       │        │                      │
│ Application          │        │                      │
│ Software (EPA)       │        │                      │
└──────────┬──────────┘        └──────────┬──────────┘
      ↓         ↑                     ↓         ↑
┌─────────────────────┐        ┌─────────────────────┐
│ Acquire/             │   ←    │ Payment              │
│ Processor            │   →    │ Networks or Card     │
│ (Epicor Payment      │        │ Associations         │
│ Exchange or 3rd      │        │ (Visa/MC/AMEX)       │
│ Party Processor)     │        │                      │
└─────────────────────┘        └─────────────────────┘
```

Credit Card Processing

The Kinetic Credit Card Processing module gives access to several components that cover credit card processing needs–available directly with Kinetic.

These components are:

- Epicor Payment Application (EPA)
- Epicor Payment Gateway
- Epicor Payment Exchange (EPX)

The Epicor Payment Application (EPA) is a payment application. It provides a service that receives the transaction information from Kinetic ERP and then sends the request to the Epicor Payment Gateway.

The Epicor Payment Gateway service connects Kinetic 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 (EPX) 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. EPX is fully integrated with Kinetic and offers higher security, easier compliance, daily batch reconciliation, and streamlined processes.

EPA 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 Kinetic ERP users is reduced.

For processing transactions in Canada, Australia, and New Zealand, the Epicor Payment Gateway connects with PayFlow Pro (PayPal). The EPX 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, texting, e-mailing
- Customer self-service portal
- Team Management and reporting
- Projected cash receipts
- Multi-currency and multi-company
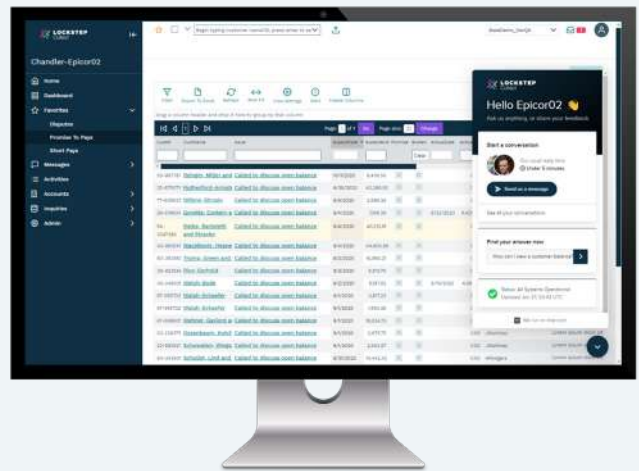
Epicor Cash Collect is fully cloud-based product offering an efficient automation for your credit collection processes. The Next Best Action pane saves precious hours for credit managers. Transcribe calls to searchable texts, make automated calls. Chat with product support agents directly from within the product.

Rebates

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

Complete functionality includes:

- Rebate transaction process generation
- Get rebates
- Rebate-to-AP invoices/memo
- Rebate contract entry
- Rebate transaction adjustment
- Tracker programs
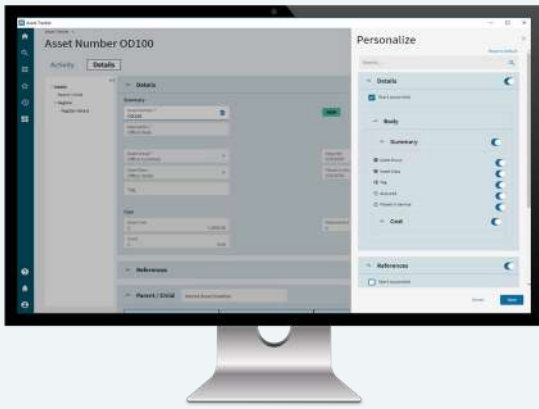
The Asset Tracker program shows all the necessary information you need on a fixed asset. Personlalize the screen as you like and hide fields you do not use in your business process.

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—non-profitable.

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 Kinetic 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.

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 taxing. Tax Connect Global also runs in a number of other geographies.

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

Business Intelligence and Analytics

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

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.

Increasing Value and Analytical Sophistication

What will happen?

What is happening?

Predictive Analytics

Operational Reports and Dashboards

Kinetic
Business Intelligence and Analytics

Diagnostic Analytics

Descriptive Analytics

Why did it happen?

What happened?
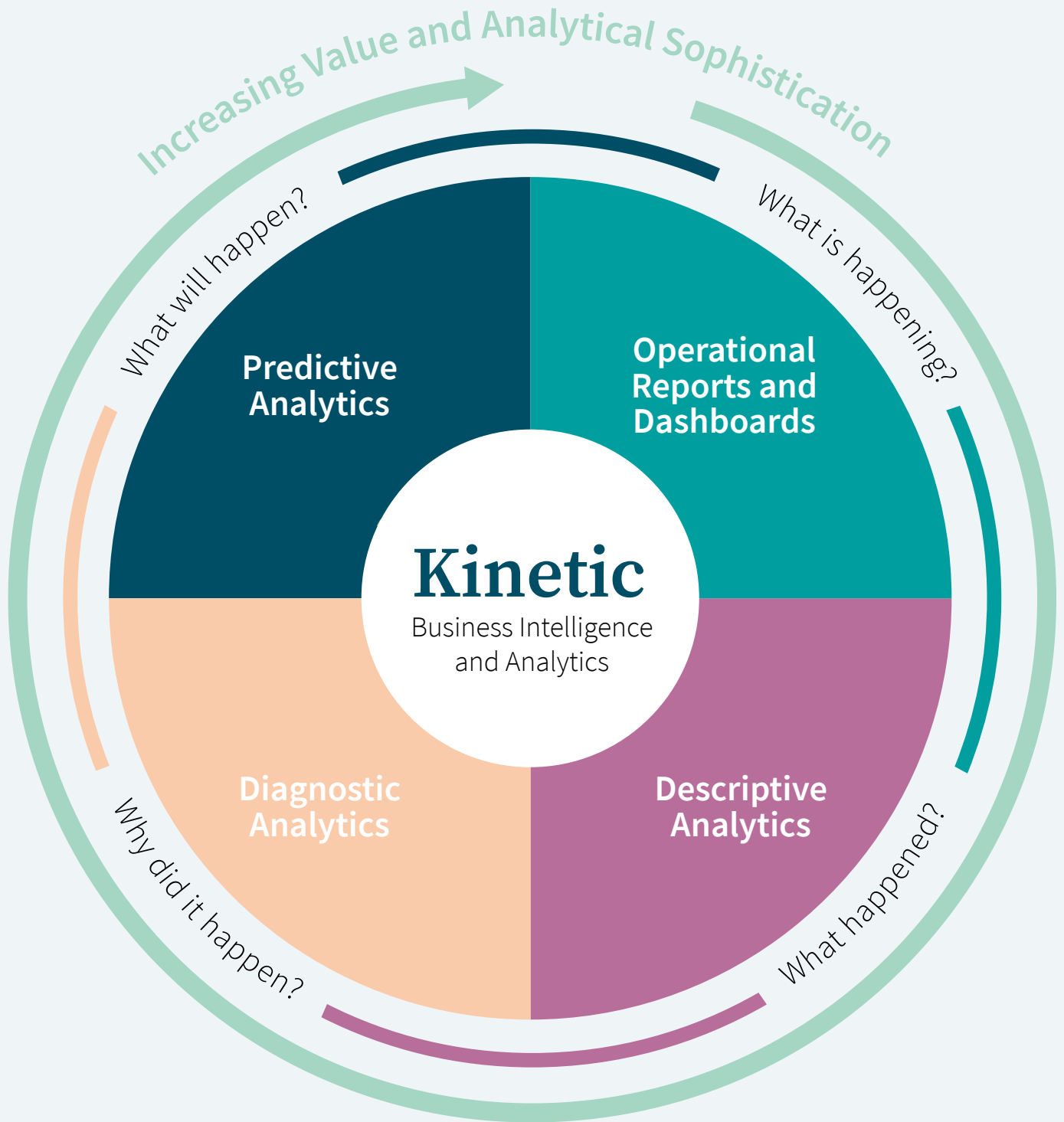
Become a data-driven organization that can make fully informed decisions at every turn.

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 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
- Advanced MES

Business Activity Queries

Every business needs an intuitive and easy- to-use query engine, which is why Epicor created 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 or view results in a BAQ grid or 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

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 and Dashboards

The Kinetic Home Page permits the combination of multiple widgets for data views, dashboards, and BAQ qrids 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

Trackers, Grids, and Charts—Closely manage customer and supplier performance with comprehensive role-based and interactive dashboards that offer a complete picture.
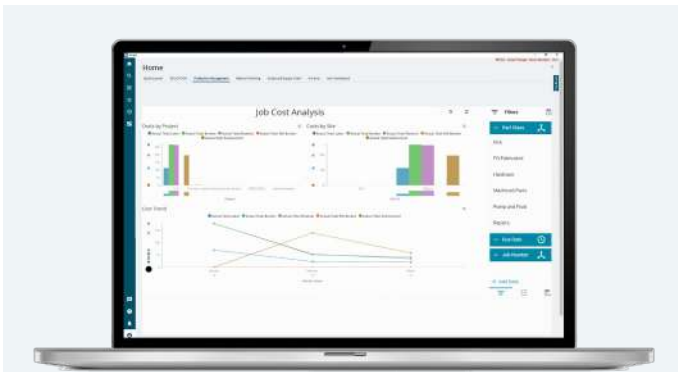
Data Discovery—Drag and drop measures and dimensions in the real-time Data Discovery view for new insights.

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 screen real estate. Data Discovery automatically adjusts its layout and behavior to the browser and device 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.

Data Discovery IoT Widgets

Epicor IoT is an 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 and improves productivity as a result. 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 historical trending analysis.

Data Discovery

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 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, Data Discovery visualizes short-term, up- to-the-second enterprise data.

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

Powered by Phocas, Epicor Data Analytics (EDA) helps companies turn their data stored in Kinetic into actionable insights. EDA 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.

EDA 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 EDA 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.

EDA includes all currently available Kinetic and Advanced MES content packs, and you can easily 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
- Production/Project Management
- Material
- Financial
- Field Service
- Maintenance Managment
- Advanced MES

EDA Advanced MES Dashboards

Advanced MES collects data directly from equipment and operators on the shop floor in real time, minimizing inaccurate and time-consuming manual data collection. 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. EDA Dashboards take it a step further by aggregating

Epicor Data Analytics—Access cloud-based Epicor EDA from desktops or mobile devices.

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 Advanced MES

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

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. Refer to the "Financial Management" chapter for more information on these products:

- EDA Financials
- Epicor Financial Planner
- Spreadsheet Server

Predictive Analytics

What will happen next? Plan for success using demand planning and inventory optimization tools in the Smart Inventory Planning and Optimization Platform.

Smart Demand Planner

Smart Demand Planner provides cloud-based statistical 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 Optimization

Safety stock levels, reorder points, lead times, and order quantity directly influence the service vs. cost relationship. Epicor Smart Inventory Optimization 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

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

Whether through acquisition or organic growth, more and more companies are wrestling with the complexities of managing multiple business entities. Epicor Global Business Management helps to ensure that no matter how distributed your organization becomes, you can maximize efficiency and drive business results. To support the needs of today's increasingly distributed business, Epicor offers robust global business functionality. You can perform transactional functions between systems and entities—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

Streamline your business with Epicor 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 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

Kinetic 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.

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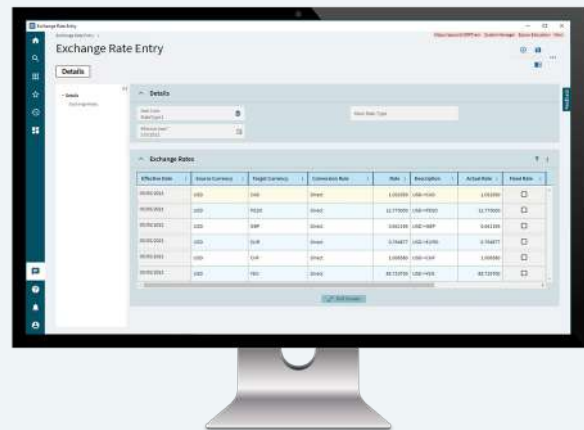
Multiple currencies are supported in Kinetic with a daily currency exchange rate. This is escpecially important when you need to make a periodic revaluation in your books or if you have currency orders and invoices every day.

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 multiplant functionality.

Complete functionality includes:

- Sourcing by plant
- Comprehensive production plant visibility
- Virtual plant support
- Shared warehouses
- Costing by plant
- Alternate BOMs and routings per plant
- Multiplant scheduling functions

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

Multiple Companies in Different Databases and Regions

Kinetic 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 Multi-Company 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 Intercompany Sales & POs
- Automation of AP/AR invoices for Inter-Company trade
- Centralized AP and Collections
- Consolidated Purchasing
- Multi-Company Journals / AP Allocations
- Multi-Company GL accounts and Financial Book Consolidations
- Can be a combination of on-prem or cloud deployments i.e. Cloud to cloud, cloud to on-prem or vice versa
- Multi-Company Azure Service Bus
- Batch synchronization of defined Global data and transactions

Multilingual Data Management

Corporate growth and expansion inevitably leads to new markets and new geographies. Epicor Multilingual Management—alongside Epicor Global Configurable Engines—facilitates this growth with resources that can manage your business wherever you take it, 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. Epicor Master Data Management (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, operational efficiency, and business performance.
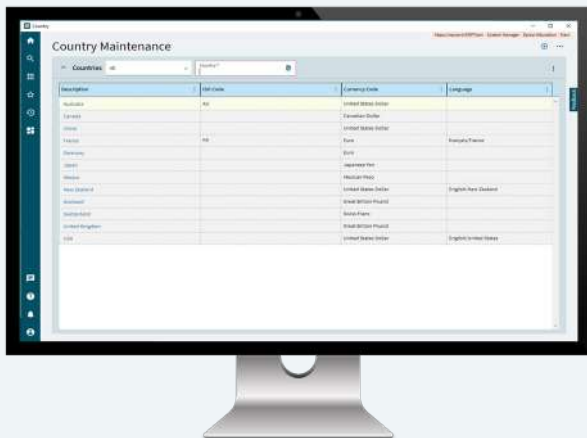
The Country Maintenance application in Kinetic allows you to set up all the countries you do business with. The country codes are applied on business partners such as suppliers or customers and these play a significant role in the Country Specific Functionality (CSF) packages.

Scalable Deployment

Multisite organizations need flexibility to deploy optimally at each location, maintaining uptime, and keeping costs low. Kinetic lets you deploy your companies or locations together in a single cloud or on premises instance or you can leverage the Kinetic multisite architecture to disperse the deployment with each location dispersed with each location on a separate regional cloud instance or on premises with multiple databases and multiple servers – cloud or on premises. The busines scan can gain a consolidated view of multi-company transactions without needing all to run out of a single Kinetic Cloud database in a single Azure datacenter. With the Multi-region Multi-company 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.

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

Kinetic delivers 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 Kinetic 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 Kinetic ERP 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.

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 any areas of the Kinetic system, but this module is mostly used for financial data reporting such as GL transactions, Chart of Accounts, balances, electronic VAT reports, 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. The Epicor Country Specific Functionality (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 (CSF)

When expanding your business to new regions or countries, the Country Specific Functionality packages provide access to a range of functionality required either by law or by a specific industry or by a widely used local process. The CSF packages are developed, tested and released 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 and 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 efforts, 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.

• 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 every day tasks – in the way they need it.

Multinational companies have to deal with unique business process requirements for differen countries and 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 seeral configurations for different sites, countries or user roles without needing to rebuild the functionality multiple times. Save time by synching 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/no code environment. Protect your investment by staying current with the 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.
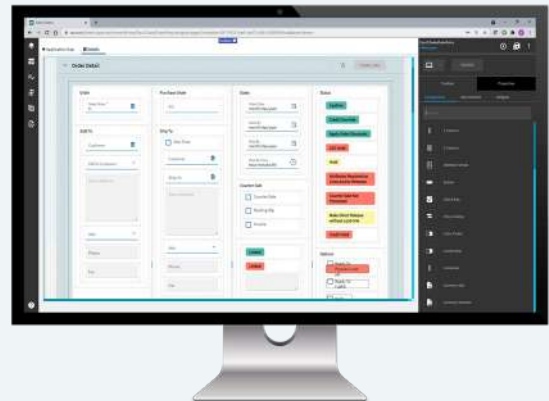
No code/low code configurations provide flexible solutions to help you stay ahead.

Governance, Risk, and Compliance

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

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

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

Complete Corporate Governance functionality includes:

• Epicor Financial Report Writer
• Financial planner
• Epicor Data Analytics (EDA)

Risk Management

Enterprise Resource Planning (ERP) systems control the majority of corporate information that could potentially be at risk from piracy, fraud, and sabotage concerns. The only way to truly manage and mitigate risk across the organization is to have a fully integrated, end-to-end solution providing a single, verifiable set of financial and operational metrics. Epicor GRC provides an integrated enterprise solution with built-in, application level risk mitigation tools and Business Process Management (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 allows organizations to embrace data governance and data protection strategies, help control risk, and handle regulatory compliance.
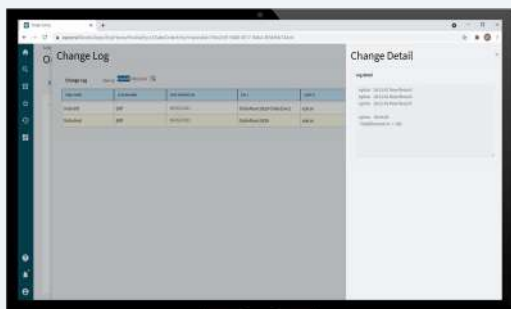
Risk Management—Automatically track changes with risk mitigation tools—such as table and field level audit capabilities

Security Management

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

Complete functionality includes:

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

Business Process Management

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

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.

Electronic Compliance Reporting Tool—Easily adapt to changes in electronic reporting and filings.
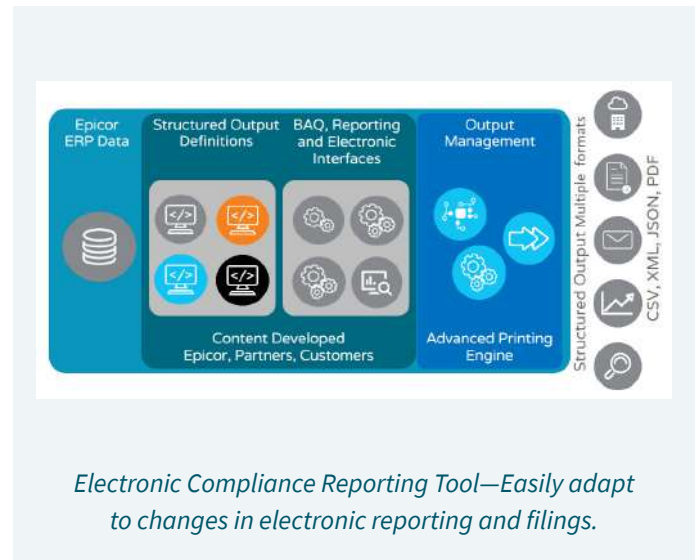
Environmental and Energy Management

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 EpicorAdvanced 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. Easily capture and analyze energy performance indicators (EPIs) to reduce consumption and cut costs.

Cloud Business Platform

- 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

Kinetic delivers a scalable, cloud solution with a focus on agility so that you can adapt to the changing business climate while doing so with the peace of mind that your critical business systems are secure and ready when you need them. The solution delivers pragmatic innovation on a regular basis to keep your business up to date with the latest industry functionality that keeps 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.

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 futureproof your ERP investment.

Businesses can easily evolve their use of Kinetic with business process optimization from our Business Process Management (BPM) and Epicor Functions solutions and use technology such as Kinetic RESTful service APIs to extend to other applications where needed in an upgrade-resilient and secure way. The Epicor 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.

The capabilities of the Kinetic Platform include:

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

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.

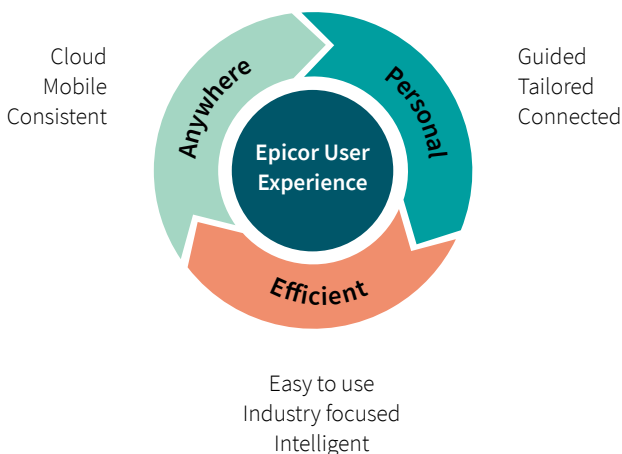*Evolve your business technology to meet the needs of todays workers.*
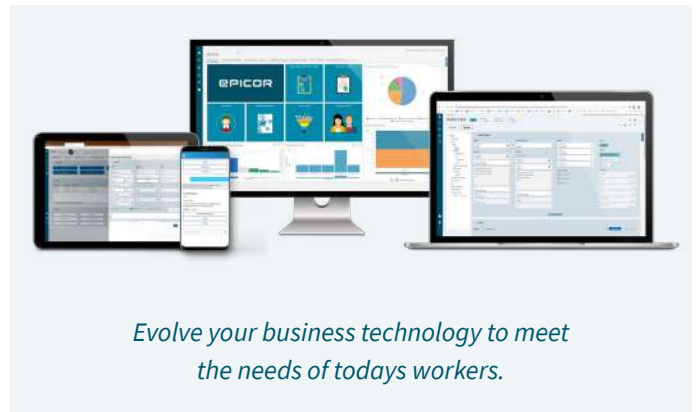
Kinetic offers a mobile, browser-based user experience that enables employees to complete tasks in less time while optimizing their personal workflows.
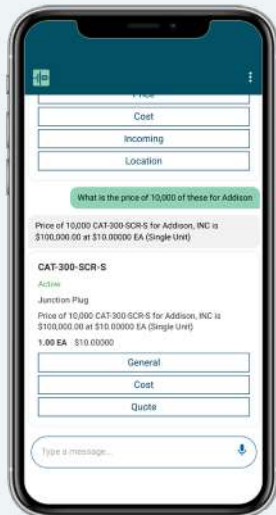
The Kinetic users experience delivers a user experience that is:

- 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

Create 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.

Cloud Mobile Consistent — Anywhere

Guided Tailored Connected — Personal

Easy to use Industry focused Intelligent — Efficient

Epicor User Experience

Talk to EVA for queries and actions in Kinetic

Innovate processes with strong collaborative tools that connect workers and teams.

Epicor Virtual Agent (EVA)

Epicor Virtual Agent 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 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.

Collaboration

Meaningful relationships exist across your company and are a great resource for serving customers and improving efficiency. When workers engage with each other to solve problems and innovate processes, your business benefits

and strengthens. By integrating unstructured meetings and conversations with your critical business Kinetic data and by enabling employee conversations digitally, you can help eliminate working silos, giving your business a competitive advantage.

Collaborate is an enterprise-wide collaboration and productivity tool built on the cloud. It's easy to use with hashtags and mentions, connecting groups of workers simply.

Easily accessible across Kinetic, Collaborate shifts works from monitoring analytical dashboards and report to being actively engaged with instant notifications from Kinetic process and events. Collaborate message streams collect and communicate these messages across the enterprise. Outlier processes that often bury users in meetings or emails are easily mainstreamed with the flexibility and simplicity of Collaborate.

Collaborate has key integrations that drive worker productivity including:

- Microsoft Teams: integration enables teams with external players to connect on project details by Sharing Collaborate messages

- 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, delivers on the simplicity through natural language to answer questions of Kinetic.

- Data Discovery: Offers users the ability to share Data Discovery metrics through Collaborate.

- File Sharing: Easily share files digitally with Collaborate

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
- Easily find relevant busines 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.

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 what a learner is looking to do. 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.

Simplify looking for things in Kinetic with Enterprise Search.
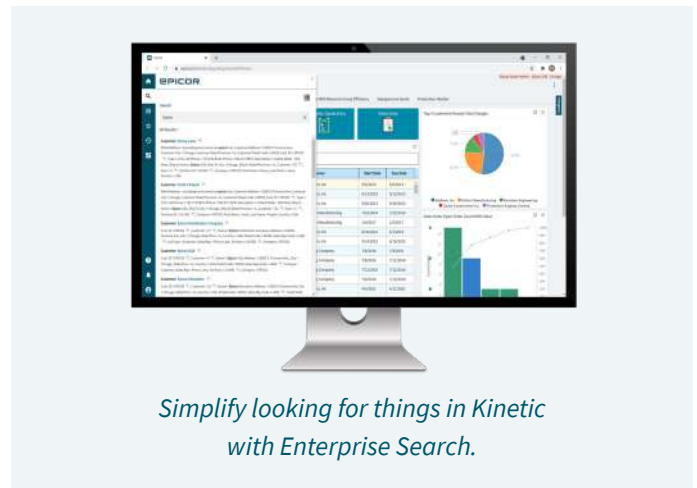
Epicor Learning is a complete training experience, a mapped and planned program that includes hands-on Exercises and so much more. The Epicor Learning License, will five you full access to Epicor Learning Center with a deep catalog of video-based courses and Hands-On exercises, role-based learning paths, and the tools to quickly manage their 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 (ELC) role-based agendas, providing a more blended, immersive learning experience where people can first WATCH, and then DO. Hands-On Exercises are launched directly from ELC, 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 our training into definitive learning paths that take you from new user to expert.

Flexible, Curated Learning Pathways

Build Your Foundation → Stay Productive → Extend Your Knowledge

Set learning paths
Chart your courses and pathways

Watch and learn
Introductory videos

Fast solutions
Short videos and FAQs

Guided learning
'How to' walk throughs while you work

Advancing skills
Master courses and test your knowledge

Get hands-on
Practice and reinforce skills

Intuitive help
Active suggestions, tips and resources as you need them

Further reading
Articles and technical guides

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

Help and Support

The Help and Support Panel, embedded on 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 life 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

Business Process Management

Building on and extending beyond the simple rules enforced by Business Activity Management (BAM), Epicor Business Process Management (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.

BPM is integrated across the toolset to enable easier deployment of key integrations and business processes in your ERP. For example, BPM works with Collaborate as a notification engine of events, with Epicor Functions to invoke standard processes and facilitate more elegant integrations, and Service Connect for execution of workflow.

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 (CDC) 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 solutions includes 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, Collaborate lets users create custom notification rules. This is achieved with the Change Data Capture (CDC) 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.

Epicor IoT

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 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.

Epicor 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 Epicor IoT module. Epicor 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.

Advanced MES

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–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.

Service Pro

Service Pro delivers an IoT-Connected Field Service Solution for Manufacturers. Manufacturers desire to consistently provide a great service experience for their customers, especially when the equipment, machinery or other product is mission critical, and needs rapid repair or ongoing maintenance. Collecting IoT-driven machine health and maintenance data is only the start. Translating that data into proactive, preventive field service actions can mean the difference between customer uptime and downtime. Join your IoT asset to Service Pro for end to end field service, from sale and in-service date, to preventive maintenance, inspection and repair activities.

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

Epicor delivers 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 reduces the time and effort in building business-specific metrics and shortens the time for deploying and ROI for your ERP solution. 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
- Data Discovery
- Epicor Data Analytics (EDA)
- EDA Content Packs for Sales, Production/Project Management, Materials, Financials, Field Service, Maintenance Management, and Advanced MES
- EDA modules for Financial Statements, Budgeting and Forecasting
- Epicor Financial Planner
- Spreadsheet Server
- Epicor ECM (Enterprise Content Management)
- 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 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.

Enterprise Content Management leverages smartphones and tablets for access anytime, anywhere
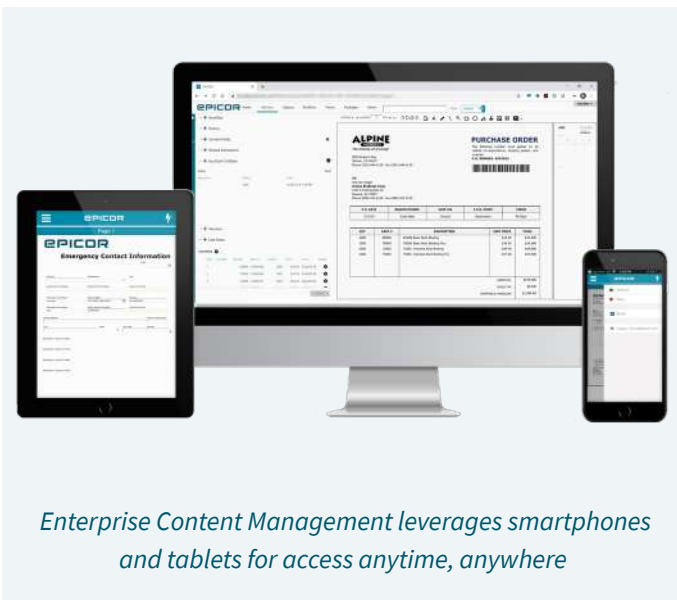
Enterprise Content Management

Enterprise Content Management (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 AP Automation module, many manufacturers are just as interested in applying the solution to other departments, such as in packaging and

shipping, where the ECM PackageWorks module enables high-speed, automatic selection of the appropriate quality document packages unique to each customer's order and 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:

- AP Automation (refer to "Financial Management" chapter for more information)
- Sales Order Automation (refer to "Sales Management" chapter for more information)
- PackageWorks for document package workflows
- Intelligent Data Capture
- Electronic Forms
- Connector for DocuSign® eSignature
- Customizable Workflow module

Intelligent Data Capture

The first step in most Epicor ECM workflows, Intelligent Data Capture (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 a 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 any attachments associated with a document. Lastly, 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.

eCommerce Platform

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 Connect (ECC) was designed to solve the challenges of manufacturers and their unique needs as they integrate an eCommerce solution. ECC is built on the Magento platform—a leader in eCommerce—with a comprehensive ecosystem and tooling in constant development to enable businesses to stay current with latest commerce trends. Epicor Commerce Connect 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 capabilities. Finally, ECC 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 Connect 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.
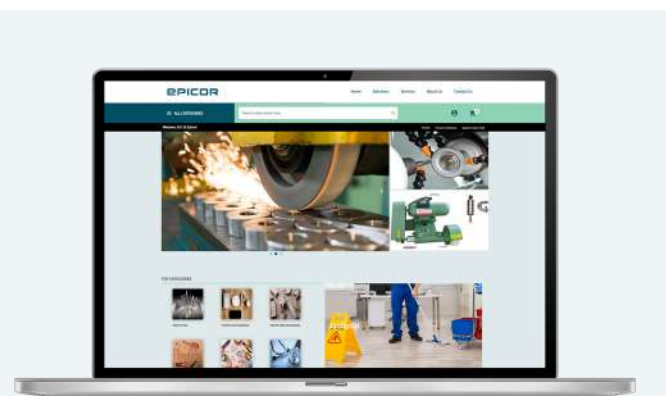
Epicor Commerce Connect is always a click away for a great customer experience and additional revenue potential.

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 have similar benefits when transacting with your upstream suppliers—in fact, Epicor EDI (formerly called 1 EDI Source) can connect any supplier to you even if they don't have an EDI/B2B solution themselves. No matter 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 HeadQuarters funtionality 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 (refer to the "Sales Management" chapter for more information)

- Supplier Digital-Integration Suite (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
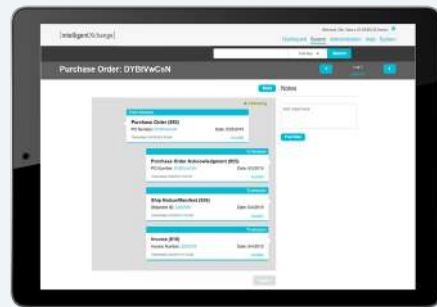
View B2B transactions in easy-to-understand text message format instead of "EDI speak"

Demand-Side Documents	Supply-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	• (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

Electronic Reports Engine

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 deliver data report files in diverse formats such as XML, JSON, PDF and more. 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, 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. The Epicor Country Specific Functionality (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.   Refer to the "Financial Management" chapter for more information on this solution.

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

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, 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 Application Studio are easier to upgrade, secure, and cloud friendly.

Application Studio tools offer an easier and faster way to create 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
- BPM integration
- Low code/no code configurations
- Upgrade resilience
- Design environment
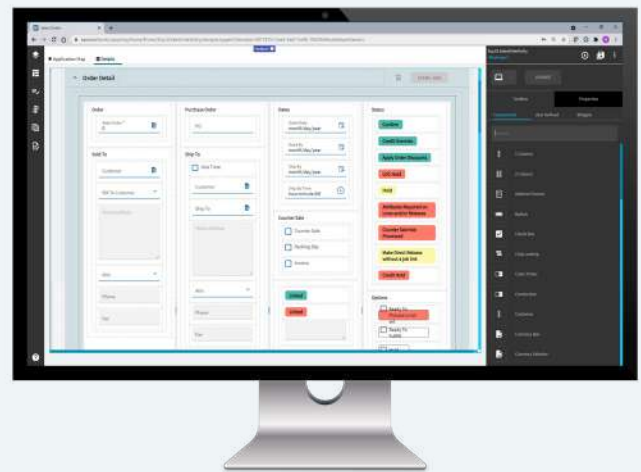
No code/low code configurations provide flexible solutions to help you stay ahead.

Epicor Functions

Epicor Functions sit 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 includes 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 (Updatable)

Create a custom view of your Kinetic data using a complete toolset. Business Activity Business Activity Query (BAQ) views can be built to be updatable. Users can generate any table of business data and make it updatable to quickly update key fields. This capability is often leveraged in updatable dashboards, Application Studio configurations, and as this is exposed as a REST service, integrations to 3rd party applications.

REST Services

Representational state transfer (REST) services are a type of web service based on the architecture of the internet. Through this application program interface (API), these services link applications more easily through Internet type connections.

Everything in the system (both the backend processes and the user experience) is available through REST Services. The entire Kinetic application offers REST Service open APIs and to simplify the use, Kinetic is also OData compliant.

What you can accomplish with the Kinetic open APIs include:

- Anything the user interface (UI) can do, you can do with our Open APIs

- You can create your own custom applications and connect with Kinetic

- You can integrate data into other business systems and applications

- Epicor Functions let you create your own RESTful services that you can use anywhere, especially custom logic for whatever you want

- BAQs let you create custom views that you can use anywhere in the system

- Integration with external systems with API keys and added security

Epicor Integration Cloud powered by Jitterbit

The Epicor Integration Cloud is the platform of choice for business system integration to allow customers to meet their specific business needs with extensible integration. Beyond the standard integration to Salesforce, 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 EIC 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. The Epicor Integration Cloud includes self-packed 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.

Epicor Service Connect

Epicor Service Connect is an edge technology that is a powerful business integration platform—functioning as a central integration point for secure workflow orchestrations within Epicor applications, as well as external connectivity to Epicor and non-Epicor applications. Because Epicor Solutions are built using Epicor APIs the power of Service Connect can be used to streamline processing within the application framework.

Pivot Easily to Meet Demands with Flexible Cloud Solutions and Deployment Choice

Leadership in global cloud ERP is in the DNA of Epicor and meeting the changing needs of your business with flexible cloud solutions delivers on business growth today and into the future - wherever that growth takes you. Kinetic is cloud ERP with 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 self-host the solution or work with a 3rd 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. The latter because of the region or remote geography challenges for cloud.

To fully meet the needs of our customers, Epicor delivers 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 delivers 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 Validation Bundle for Life Sciences 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

- Antimalware, redundant backups and disaster recovery in-region for business continuity and resiliency

- 99.98% historical global uptime—we run Epicor solutions on world-class Azure datacenters in all major regions worldwide, and 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 or 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 with 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 Multi-company 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 multi-company transactions to occur among separate, distinct instances of Kinetic either—

- Across Microsoft Azure datacenters in different geographies (distributed cloud)

- Across Microsoft Azure datacenters to on-premises locations (hybrid cloud)

For multinational organizations with company locations across the globe, you can gain a consolidated view of multi-company transactions without needing all to run out of a single Kinetic database in a single Azure datacenter. With the Multi-region Multi-company 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.

Validation Bundle for Life Sciences
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, the Kinetic Cloud Validation Bundle for Life Sciences offers a cloud solution designed

to reduce the risk of compliance with support for the software validation needs of FDA-regulated businesses. The solution couples regulatory documentation with an upgrade cadence designed for Life Sciences and the need to meet FDA requirements.

U.S. Government Cloud for Aerospace & Defense

Select the U.S. Goverment Cloud solution for compliance with ITAR and CMMC regulations. In addition to running your Kinetic solution in the Microsoft Azure U.S. Government Cloud datacenter, 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 that we're all now realizing we have to answer is not, if it happens, but when it does, do I have the right protection 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. With Kinetic, create layers of protection that reduces risk to your business, including:

- Multi-factor authentication
- Disaster recovery in region
- Daily backups retained for 30 days
- 24x7 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 and 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:

- Next-generation endpoint production powered by SentinelOne
- Firewall appliances by SonicWall
- Secure data backup services

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

EPICOR

We're here for the hard-working businesses that keep the world turning. They're the companies who make, deliver, and sell the things we all need. They trust Epicor to help them do business better. Their industries are our industries, and we understand them better than anyone. By working hand-in-hand with our customers, we get to know their business almost as well as they do. Our innovative solution sets are carefully curated to fit their needs, and built to respond flexibly to their fast-changing reality. We accelerate every customer's ambitions, whether to grow and transform, or simply become more productive and effective. That's what makes us the essential partners for the world's most essential businesses.

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