Epicor Enterprise Resource Planning Overview

Business without Barriers
Introducing

Epicor ERP Solutions: The Next Generation

With the latest release of its next-generation Enterprise Resource Planning (ERP) suite, Epicor is ready to help organizations take advantage of the changing economic tide. Epicor offers flexible and scalable ERP solutions featuring robust capabilities focused on reducing costs, streamlining processes, and improving customer responsiveness across the enterprise.

Today, Epicor ERP software is helping organizations worldwide effectively manage their critical resources with an array of scalable solutions designed to meet a variety of industry challenges, including:

- The emergence of the extended enterprise and its requirement to blend business processes across multiple facilities or branches, in harmony with the processes and systems of your customers, suppliers, and partners.

- Internal inefficiencies that impact your ability to drive new products and services.

- Increasing globalization of business requiring you to compete with an expanding landscape of competitors on dimensions such as cost, quality, and response time.

- Empowering your people to be more efficient in their roles by helping them raise productivity through effective collaboration.

- Delivering business insights into essential questions in order to support real-time decisions as well as short-, mid-, and long-term strategic goals.

Delivering the highest level of quality and process efficiency across the enterprise—through a culture of continuous performance improvement—is what creates a world-class business that can boast pace-setting levels of customer satisfaction. In response, Epicor created next-generation ERP applications to help you optimize performance across your entire enterprise, whether it operates on a local, regional, or global scale.
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Customer relationship management (CRM) strategies are as important to business today as they have ever been. We’ve designed Epicor CRM to help you stay ahead of the curve and successfully meet the challenges that the market brings—helping you effectively manage your entire customer lifecycle from prospect to cash to care, improve operational efficiency and accelerate growth—both internally and externally.

CRM controls every aspect of a company’s interaction with its customers and potential customers from generating the lead, developing the opportunity, taking the order, producing and shipping or supplying the goods or services, getting the cash and supporting the customer. Epicor CRM provides a 360-degree view of the entire customer, supplier, or partner relationship. Epicor CRM broadens the scope of customer information to everyone within and across the organization and to stakeholders beyond, through contextual delivery of essential customer data to information workers, wherever it’s needed.

### Contact Management

Comprehensive contact management is at the core of any effective CRM solution and enhances your customer service by documenting and sharing customer communication with the entire organization and helps manage contact interactions through task management. Epicor CRM Contact Management improves your overall responsiveness and focus by putting your contacts at the center of your business.

### Marketing Management

Targeting your customers with the right programs and messages and retaining those customers can be your most powerful competitive weapon in today’s challenging business world. With Epicor CRM, your marketers can pinpoint their targets, capture highly qualified leads, and perform cost/benefit and return on investment (ROI) analysis on promotional activities. And, once you have the lead, Epicor CRM helps you manage the entire sales process more effectively, with features such as workflow and forecasting.

### Campaign Connect

Campaign Connect makes marketing communication easy by managing the entire campaign cycle—from identifying and importing contacts, to creating targeted e-mails and corresponding Web landing pages. It delivers thorough reporting and analysis tools to help you build more targeted campaigns. Its user-friendly experience enables you to quickly and easily implement focused communications and campaigns with minimal training.
Lead and Opportunity Management

Outfitting your sales team with advanced, easy-to-use software is not just smart; it’s a matter of survival. Epicor CRM is equipped with the lead and opportunity management tools your sales team needs to manage the complete prospect-to-customer lifecycle, give accurate revenue forecasts to management, and automate many administrative tasks. Lead and Opportunity Management also enhances the effectiveness of your sales force by synchronizing essential Epicor CRM data with Microsoft® Office, giving your sales force full access to prospect and customer information, including sales history within Microsoft Outlook®, Microsoft Excel®, or Microsoft Word.

Case Management

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

Mobile Connect

Epicor CRM gives your mobile workforce complete control over generating leads, developing opportunities, and monitoring orders from anywhere in the world. The Mobile Connect series incorporates a disconnected database, enabling you to work anywhere you can take your laptop. Using the Progress® SonicMQ® messaging engine, Mobile Connect is comprised of three components: Sales mConnect, Sales Engineer mConnect, and Hub mConnect.

Easily manage leads and opportunities for accurate sales forecasting and pipeline analysis.
Epicor Sales Management delivers a comprehensive suite that enables you to produce accurate estimates, streamline your order-to-cash cycle, and fulfill perfect orders that ensure world-class customer satisfaction. Epicor Sales Management automates and improves labor-intensive processes for quoting, proposal generation, configuration and order entry, enabling you to improve sales productivity by increasing accuracy during the quote and order processes, and identifying the right solution to meet customers’ needs.

**Estimate and Quote Management**
Easily generate and track all customer or prospect request for quotations (RFQs), from the time of receipt until an order is placed. Get quotations out more quickly and be more accurate with pricing and lead times with a wide range of powerful tools including:
- Estimating
- Standard Routings
- Pipeline Management
- Drag-And-Drop Interface
- Realistic Cost Estimates
- Inventory Availability
- Request Supplier RFQ
- Markups
- Order/Job Integration
- Part Advisor
- Prospects
- Quote Tracker
- Competitive Analysis
- Workflow
- Part Cross-Reference
- Material Calculation and Machine Time Estimation

**Price Lists Up-Sell, Cross-Sell, and Down-Sell**
- Order-Based Discounts
- Miscellaneous Charges
- Order Tracker
- Copy Order and Build Order
- Capable-To-Promise
- Multilevel Capable-To-Promise

**Order Management**
Order Management drives the Epicor system. From the time an order is entered, its progress is tracked through final shipment, producing perfect order fulfillment on demand. With Order Management, all orders and change orders will be effectively managed online, perfecting the order-to-delivery process for maximum customer satisfaction. Built-in order management functionality includes:
- Blanket Orders
- Credit Checks
- Multiple Ship-to Addresses
- Alternate Bill-to and Sold-to Customers
- One-Time Shipments
- Fulfillment and Allocation Processing
- Fulfillment Queue Management
- Put Transaction Type
- Pick Transaction Type
- Pack Transaction Type
- Fulfillment Queue Tracker
- Drop Ship and Buy to Order
- Cross-Docking
- Sales Kits
- Configure Sales Kit Components
- Configure a Kit within a Kit
- Backorders
- Sales Commission

**Available-To-Promise**
- Order Job Wizard
- Project Management
- Counter Sales
- Tax Calculations
- Credit Card Processing
- Customer Portal Content Pack

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

Epicor Demand Management incorporates the requirements of Electronic Data Interchange (EDI) to help your company reduce planning and procurement lead time for faster production floor response. Demand Management lets you establish contracts that can be linked to sales orders and releases for automatic scheduling management; utilize fully integrated EDI capabilities for rapid flow of information to the production floor; and focus on fulfillment with secure outbound Advanced Ship Notice (ASN) transactions that the customer reconciles with each shipment.

Advanced EDI

Epicor EDI, used with Demand Management, provides a common interface for managing and exchanging large volumes of data, including creation, analysis, scheduling, and reconciliation of cumulative releases from your customers. Tightly integrated with the Demand Management module, Advanced EDI offers direct integration with your Epicor data, reducing the turnaround time on schedule changes and additions, and eliminating potential data entry errors. Capabilities include automatic acceptance status tracking, pay on receipt (POR) data, support for ANSI X12 and EDIFACT document requirements, Web Services for easy collaboration, and TIE Commerce® Software collaboration.

Point of Sale

Epicor Point of Sale (POS) extends the power of your Epicor ERP solution to a customer-facing sales environment, whether you’re an organization with a single POS station to a large, multinational chain with hundreds of stores. Epicor POS provides a feature-rich store system that empowers store personnel to provide an enhanced customer experience. Comprehensive functionality includes electronic gift cards, gift receipting, customized receipt per transaction type, coupon redemption/issuance, layaways, special orders, suspend and resume, item marking for various functions, additional input fields, multicurrency, start/end of day functions, cash management, and more.

eCommerce

Epicor eCommerce enables your company to easily deliver an intuitive, personalized shopping experience over the Web to drive new business—both from your existing customers and from new, untapped business opportunities and sales channels. With Epicor you can manage the entire order life cycle, from customers, merchandise, inventory, order history and more, right from your desktop. Epicor eCommerce capabilities include:

• Onsite or Hosted Deployment Options
• Comprehensive eCommerce Framework and Toolset
• Unlimited Products & Categories
• Built-In Visibility
• Product, Customer, and Price Synchronization
• Promotions & Coupons
• Multiple Payment Options
• Search Engine Friendly
• Merchant Account/Gateway Integration
• Advanced Automated Tax Calculations
• Sales Kits
• Customer-Specific Pricing
• SKU and Item Management
• Advanced eCommerce Website Design
• Combined B2B and B2C eCommerce Site Design
• Affiliate Marketing
• Gift Card Promotions and Management
• Advanced Search and Filtering Capabilities

Manage all of your corporate eCommerce requirements through the Epicor Commerce Management Console.
Epicor Service Management optimizes customer service with timely response to customer requests and puts knowledge in the hands of customer service personnel. Epicor understands that customers want rapid response service. From initial contact with the customer regarding an incident, to in the field operations, to processing returns quickly and efficiently, Epicor Service Management provides the visibility and accountability your business needs.

Contract Management

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

Field Service

Epicor Field Service is designed for those who install, repair, or service offsite or at the plant or depot. You can centralize all processes related to the dispatching of technicians and cost reporting of service calls in the field, with support for drop shipment of service parts directly to the customer site. Field Service capabilities include:

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

Epicor Mobile Field Service

Support more customers, transactions, and products, and maintain a wider range of business partner relationships with Epicor Mobile Field Service. Our mobile solutions securely and cost-effectively distribute and automate subsets of existing enterprise business systems outside of the company network—whether connected or remote—enabling you to transact business where it happens, regardless of location. Epicor tools enable companies to easily deploy and manage mobile devices and services to many users and disparate geographies.
Case Management

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

Returned Material Authorization

Enhanced return processing offers enterprise-wide tracking of pending returns and disposition of these parts by a unique RMA number. Enter information about returns, and transfer that information to the different groups that may need to take action (e.g., inspection, billing, and order processing). RMA functionality includes:
- Automatic RMA Number Generation
- Non-Nettable Bins
- RMA Disposition Tracking
- Automatic Credit Request
- Serialized Part Return Tracking
- Detailed Notes
- User-Defined RMA Codes
- Cost-of-Returns Management
- Self-Service Epicor Portal
- QA Tracking

Maintenance Management

Epicor Maintenance Management provides companies with a comprehensive toolset for production and facilities equipment maintenance that is critical for running their business. Facilities and production equipment can be scheduled for maintenance based on a pre-defined service interval, on usage, time, or via manual requests. Once a preventative or regular maintenance work order is established, the maintenance planner can schedule equipment down time, and trade resources and materials as needed. When maintenance has been performed on equipment, the operators can record their hours, materials used, and closing remarks. Maintenance Management functionality includes:
- Equipment Maintenance Tracking
- Parent/Child Equipment Tracking
- Automatic Maintenance Work Order Generation
- Maintenance Request Management
- Maintenance Request Queue Monitoring
- Preventative Maintenance Set-Up
- Scheduled Maintenance Planning
- Special Tools Tracking
- Issue & Resolution Tracking
- Warranty Tracking
- Equipment Maintenance Tracking
- Work Order Request Tracking
- Maintenance Work Order Tracking
- Gauge Calibration Plans
- Repair History Tracking
- Reporting

![Initiate and track RMAs for customer returns and track reasons for rejected items.](image)

![Closely manage performance of business assets with Maintenance Management.](image)
Epicor Product Data Management (PDM) serves as a central knowledge repository for process and product history. PDM promotes integration and data exchange among all enterprise users who interact with products—including project managers, engineers, salespeople, buyers, and quality assurance representatives. Epicor PDM provides a complete end-to-end solution to manage all aspects of a product’s lifecycle, enabling enterprises to control the enormous number of electronic documents produced.

**Bill of Materials (BOM)**

Epicor supports traditional BOM management with single-level part formats that recognize the materials and components required to build end parts. In addition, Epicor introduces multilevel BOM management that incorporates not only single-level components and material requirements, but also internal and external routing steps for complete end assembly visibility, planning, scheduling, and costing. Epicor introduces visual engineering technology with indented tree structures and drag-and-drop BOM management. Bill of Materials functionality includes:

- Centralized Product BOM Management
- Drag-And-Drop Interface
- Visual BOM Display
- “Get Detail” Functionality
- Predefine Alternate Boms
- Expansive Part Number
- Reference Designators Of Boms
- Document Linking
- Costs Stores Monitoring
- Cost Replacement Rollup
- Requirements Reporting
- Critical Path View
- Phantom Structures Flexibility

**Routings**

Detailed routings facilitate planning, scheduling, and costing of products more efficiently. Everything needed to produce a product is managed in one central location. Managing changes to routings is simplified. Changes are automatically communicated to the plant floor execution system and operators have online visibility of the latest routing production notes, as well as standards and resource requirements.
Engineering Change and Revision Control

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

- Engineering Workbench
- Engineering Approval
- Multiple Revision Capabilities
- Revision Effectivity Management
- Powerful Search
- Complete Revision Tracking
- Dynamic Revision Compare
- Automatic Engineering Workflow
- Complete Product/Assembly Visibility
- Mass Replace/Delete
- Express Check-Out

Product Lifecycle Management

Epicor Product Lifecycle Management (PLM) serves as a central knowledge repository for process and product history, and promotes integration and data exchange among all enterprise users who interact with a product. Epicor PLM manages all documentation associated with a product throughout its entire product lifecycle, and includes full integration with more than 12 computer aided design (CAD) systems as well as various electronic design automation (EDA) systems. Functionality includes:

- Secure Electronic Vault
- Document Security
- Check-In/Check-Out
- Search Capabilities
- Document Preview
- Comprehensive Document Relationship Management
- Historical Change Detail Log
- CAD Integration
- Sub-Document Management
- BOM Push From CAD
- Automatic Title Block Update
- Revision Management
- Automatic BOM Generation
- Drawing Copies Generation
- Multi-CAD System Support
- E-mail System Integration
- Microsoft Office Integration
Product Costing

As a manufacturer or distributor, you consistently monitor product cost and analyze profitability as a way to pass on cost savings to customers while staying competitive. Epicor offers the flexibility and accuracy needed to analyze product cost on a customer-by-customer, part-by-part, and job-by-job basis. Product Costing functionality includes:

- Elements of Product Cost
- Costing Workbench
- Multiple Cost Set Grouping
- Multiple and What-If Cost Sets
- Part Cost-per-Plant Setup
- Cost Load
- Cost Rollup
- Alternate Routing Methods Option
- Cost Rollup Group Report

Maintain and view costing by part type and cost type, and access this information throughout the system.

Product Configuration

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

- Component-Level Price Lists
- Configurator Rules Copy/Paste
- Custom Screen Input Builder
- Dynamic List Creator
- Generic Part/Multiple Rules
- Global Configurator Variables
- Import/Export Configurations
- Configuration-Based Price Calculation
- Features/Options Designation
- Custom Rule Expression Builder
- Add Comments to Rules
- Keep When Rules
- MRP Inclusion
- Microsoft Excel® Interface
- Ensure Rule Accuracy
- Smart Part Number Builder
- Part Number Creator
- Configured Parts Within Configured Parts
- Multilevel Configured Parts

Build complex and flexible configuration models with attractive interfaces to customers.
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. For companies with complex processes that require project management and resource management capabilities, Epicor Planning and Scheduling offers a comprehensive solution that is baked into the fiber of the product for unparalleled operational visibility.

Forecasting and Master Production Scheduling

Forecasting and Master Production Scheduling (MPS) in Epicor are designed to assist manufacturers and distributors with both day-to-day control and long-range planning and decision making. Forecasting and MPS support your business strategies, as well as those businesses that operate multiple, mixed-mode strategies simultaneously. Forecasts can be generated from multiple historical sources (e.g., sales, invoice, and inventory usage history). Forecasting & Master Production Scheduling functionality includes:

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

Forecast Pro for Epicor

Forecast Pro® for Epicor is a comprehensive forecasting solution designed for accurate automated forecasting, collaborative forecasting, working with complex hierarchies, maintaining multiple forecast overrides, documenting your forecasting sessions, and integrating with other systems. With Forecast Pro for Epicor you can create accurate forecasts quickly and easily using proven statistical forecasting methods such as Exponential Smoothing, Box-Jenkins, Seasonal Simplification, Demand Models, Curve Fitting, and Simple Methods. Forecast Pro for Epicor functionality includes:

- Expert Selection Mode
- Multiple Statistical Forecasting Method Support

Use Forecast Pro for Epicor’s Expert Selection capabilities to simplify the forecast process by creating accurate forecasts automatically.
Material Requirements Planning

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

- General/Specific Part Forecasts
- Manual Forecast
- Forecast Import/Export
- Master Production Schedule
- MRP Generation
- Log File
- Material Planning
- Dynamic Lead Times
- Part-Planning Tools
- Plan as Assembly
- Planning Horizon
- Auto Job Firm Process
- Multisite MRP Management
- Multilevel Pegging
- Sourcing by Plant
- Available-to-Promise
- Multiple Planning Types
- Rough Cut Horizon
- Recycle Jobs
- Short Horizon Days of Supply
- Short Horizon Planning
- Calculate Manufacturing Lead Time
- Start Minimum Quantity
- Bill of Materials

Scheduling and Resource Management

Multiple resource views and online scheduling tools such as the change impact informer offer the master scheduler and manager the ability to visually locate overload problems and slack conditions, then perform cost and throughput analysis on schedule changes before they are firmly committed. Scheduling & Resource Management functionality includes:

- Production Scheduling Board
- Alerts
- Finite Scheduling Capability
- Customizable Start Time
- Drag-and-Drop Scheduling
- Operation Complete Quantity Displayed
- Operation Complete Time Displayed
- Overload Informer
- Multilevel Assemblies
- Job Scheduling What-If Mode
- Setup Grouping
- Capabilities with Zero Priority
- Change Impact
- Dual Resource Constraints
- Conditional Forward Schedule
- Resource Group
- Finite Load Horizon
- Resource-Based Schedule
- Reschedule Delta
- Rough Cut Scheduling
- Scheduling Factor Send Ahead
- Scheduling Blocks
- Global Scheduling Component Process
- Material Constraints Displayed

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

Manipulate the schedule directly from a sophisticated, drag-and-drop visual scheduling board.
Advanced Planning and Scheduling

Available as an extension to Scheduling, Epicor Advanced Planning and Scheduling incorporates the strength of the Scheduling engine and enhances it with advanced functionality such as multiple constraint scheduling, a wide range of scheduling methods, visual drag-and-drop scheduling, capability and dependent capability-based scheduling, real-time capable-to-promise functionality, and advanced material planning functionality. Advanced Planning & Scheduling functionality includes:

- Capable-to-Promise
- Multiple Resource Scheduling Board
- Multiple Constraints
- Resource Eligibility
- Automated Scheduling by Capability
- Dependent Capabilities
- Finite or Infinite Capacity
- Minimum WIP Scheduling
- Dimensional Planning
- Rate-Based Scheduling
- Material Constraints
- Advanced Material Planning
- Change Impact Analysis
- Time Adjustment
- Optimization Rules
- Balanced Optimization
- Single Cell Scheduling
- Unlimited What-If
- Multi-Plant Communication
- Interdependent Plant Schedule Coordination

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.
Epicor Project Management is a comprehensive solution for project managers who plan and execute simple or complex projects that can require intricate multilevel phases as well as strict costing and complex billing. Project Management utilizes the detailed estimation, planning, scheduling, costing, and supply chain logistics of Epicor for complete control and analysis of any project, including Resource Management, which provides a detailed representation of resource capabilities and availability. In addition, Time and Expense Management and Approval ensure projects accurately reflect true costs and the comprehensive Billing and Revenue Recognition functionality guarantee compliance with contract requirements and accounting standards. Combined Project Analysis, Reporting, and Business Process Management provides accurate and up-to-date status information and meaningful alerts.

**Project Planning**

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

- Project Generation
- Definable Project WBS Phases
- Template Projects
- Dynamic Project Budgeting
- Assignable Project Inventory
- Microsoft Project Integration
- Definable Milestones
- Checklist Tasks
- Project Schedule Calculator
- Business Process Management Support
- Customizable Invoicing
- Detailed Project Analysis
- Advanced Cost Analysis
- Streamlined Revenue Analysis
- Revenue Recognition Workbench
- Advanced Project Analysis
- Responsive Visibility
- Project Attachments

**Resource Management**

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

Time Management in Epicor provides a highly configurable environment for the recording and management of time across projects, jobs, service orders, and internal codes. A range of entry options are available, each reflecting the nature of a particular transaction. Time can be entered online, on the shop-floor, or in the office, resulting in quick and accurate recording. Time recording reliability is reinforced through an array of task-centric entry options, which focus on the critical data required in each context. Additional configuration options ensure that users only have access to authorized jobs and booking codes, with a clear separation between direct and indirect labor entry. Additionally, the flexible approvals process provides the security to ensure that transactions are properly authorized and backed up by a comprehensive audit trail. Time Management functionality includes:

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

Expense Management

Expense Management in Epicor helps eliminate administrative effort and increase efficiency by providing a secure environment for recording and managing multicurrency expenses across projects, jobs, and service orders, as well as purely internal expenses. Expense Management’s flexible approvals process also provides the security to ensure expenses are properly authorized and backed up by a comprehensive audit trail, with approved transactions flowing directly into Accounts Payable for fast, efficient processing and reimbursement. Expense Management functionality includes:

- Access From Calendar
- Detail Expense Entry
- Expense List
- Internal Expenses
- Quick Codes
- Multiple Transaction Comments
- Configurable Expense and Payment Types
- Contextual Approvals
- Advanced Workflow
- Approvals Queue
- Efficient Reimbursement
- Business Process Management
- Proxy Users
- Reporting and Analysis
- Detailed Audit Trail

Project Billing

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

- Detailed Contract & Project Variations
- Customer Shipment
- Cost Plus Invoicing
- Fixed Fee Management
- Progress Payments Invoicing

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

Comprehensive contract management provides a range of invoicing options to cater for any billing situation.
As the global marketplace continues to shrink profit margins and customers become more demanding, businesses are looking for agile solutions that can provide the infrastructure they need to respond quickly and efficiently. Epicor offers a comprehensive solution for make-to-order, mixed-mode, make-to-stock, engineer-to-order, and configure-to-order manufacturers, including light assembly features for distribution businesses. Modular in design, the production control suite of modules include Job Management, Lean Manufacturing, Manufacturing Execution System (MES), Quality Assurance, and Advanced Quality Management.

**Job Management**

The Job Management module is a comprehensive production control solution designed specifically for the planning, routing, scheduling, costing, and tracking of goods—including assembled, manufactured, and semi-finished products. It includes innovative tools for better planning and costing with historical run analysis that compares estimates to actauls on a run-by-run basis. Job Management functionality includes:

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

**Advanced Production**

Advanced Production deploys batching technology that enables users to group multiple parts or operations together for key production processes. The result of this batching process is a single reporting entity or job for simplified scheduling, tracking, and reporting of labor and materials on the plant floor. This functionality is available in the job planning and resource scheduling functions within Epicor, with both planned and “on-the-fly” grouping flexibility to end users. Additionally, users can select to plan operations sequentially—one operation after another or concurrently—to be complete at the same time for nested operations. Advanced Production functionality includes:

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

**Lean Production**

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

- Manufacturing Without Work Orders (Kanban Flow)
- Cell-Based Inventory Management
- Real-time Manufacturing Kanban
- Manufacturing Flow Kanban

Provide detailed information to the plant floor about every aspect of a job.
• Real-time Stock Replenishment Kanban
• Real-Time Purchase Kanban
• Automated Material Flow
• Lean Performance Metrics Measurement
• Flexible Lean Metrics
• Support for Hybrid Approaches to Lean

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

• Flexible Data Entry Technology
• Comprehensive Document Management
• Work Queue
• Multiple Languages
• Distributed Hours
• Quality Reporting
• Shop Warnings
• Grace Periods/Multiple Shifts
• Trackers in the Plant

• Shop Tracker
• Shipping and Receiving
• Inventory Management
• Material Handling

Quality Assurance

Extending your solution with the Quality Assurance module ensures that you gain complete visibility into your quality operations from a top-down view down to the individual item level, allowing you to tie together all quality functions, whether it’s scrapping end parts, rejecting raw materials or tracking first article inspections. Accurate costing demands that products moved through quality accurately reflect their value and are removed from the appropriate work in progress. Additionally, Quality Assurance includes processes for supplier returns with links to Accounts Payable for automated debit processing —closing the loop on traceability of products in and out of quality within the plant. Inspectors have queues of items to inspect with full disposition and corrective action follow-up, while plant floor employees can easily flag parts as non-conformant. Quality Assurance functionality includes:

• Inspection Workbench
• Nonconformant Records
• Non-Netting Bins
• Discrepant Material Report Processing
• Corrective Action traceability
• Material Review Board
• Cost of Quality
• Packing Slips
• Debit Memos
• Audit Trails
• Certificate of Compliance verification

Manage electronic queues for Kanban control with the Kanban Monitor. Optionally display on the plant floor information about current Kanban records in a dashboard format.
Enhanced Quality Assurance

Traceability and audit of quality data drives businesses to develop “systems”, many times paper based, to support the collection and use of quality testing data. Enhanced Quality Assurance is designed to extend base Quality Assurance with support for the management of controlled test plans and the results for products, groups of products, processes, and other testing. It offers the ability to define testing elements or attributes as well as lists of attributes to test which can be used to measure against testing results for pass/fail decision criteria. It includes the data used for Statistical Process Control (SPC) and is easily accessed to build SPC analysis. In essence, Enhance Quality Assurance gathers the data and makes it available to ensure that your next audit goes smoothly.

- Definable Inspection Attributes
- Specification List
- Customizable Inspection Plan
- Flexible Results Collection
- Statistical Process Control (SPC)
- Flexible Inspection Plan Configuration
- Return Material Authorization (RMA) Inspection
- First Article Inspection
- In-Process Inspection
- Subcontracting Inspection
- Manufacturing Execution Systems Enabled
- Serial and Lot Traceability
- Inspection Collect Results Location
- Inspection Data Tracker
- Skip Lot Cycle Definitions
- Resource Calibration Test Plans
- Quality Analysis and Real-Time Response to Quality Data

Advanced Quality Management

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

- AQM Compliance and Audit
- AQM Data Collection
- AQM Equipment Management
- AQM Product Launch

Track results data online.
Linking trading partners, processes, and systems that make up your supply chain has become the differentiation you need to achieve industry-leading performance. Removing processes that do not add value and synchronizing processes within and outside a company enable you to meet customer demands for lower cost and faster delivery. Epicor offers you a full range of Supply Chain Management (SCM) capabilities, built within a single business platform, based on industry-leading, service-oriented architecture (SOA). Epicor SCM is a full suite of enterprise application capabilities including purchase management, sourcing and procurement, inventory management, advanced material management, and warehouse management, and is complemented by order and demand management capabilities of Epicor Sales Management. Combined, you have the solution needed to satisfy customers and customer demand in today’s increasingly global market place.

### Purchase Management

Purchase Management handles purchase order writing and the tracking of supplier performance. Detailed line items indicate planned receipts to inventory or a job, although their destination may be changed at the time of actual receipt entry. Purchase order receipt processing updates suggested supplier and detailed purchase history files, which provides continual reference to aid in making purchasing decisions. With Purchase Management, you can reduce inventory levels, improve on-time deliveries, enhance your cash flow, and increase your profit levels. Complete functionality includes:

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

### Sourcing and Procurement

Strategic sourcing is the most important, value-added activity that procurement professionals perform for their company. Doing it well requires a wide range of skills and subject matter expertise. Sourcing by “old school” methods requires an inordinate amount of time gathering and comparing offerings from multiple suppliers. Automating those tasks with Epicor Sourcing not only allows the purchasing professional to focus more time and energy on strategic activities, it also provides for online collaboration and fosters competition that amplifies the value of their work. Complete Sourcing & Procurement functionality includes:

- Configurable Sourcing
- Automated Electronic Requests
- Configurable Weighted Attributes
- Side-by-Side Comparison Capability
- Graphical Bid Analysis
- True Online Supplier Collaboration
- Supplier Relationship Management
- Buyer’s Workbench
- Part Price-Break Tables
- RFQ Decision Wizard
Inventory Management

Inventory Management provides the key functions necessary to update and maintain raw materials, WIP, and finished goods inventory quantities and costs. MRP creates inventory allocations for jobs entered through Job Management or generated from Order Management. Issued inventory reduces quantities on hand, which are continually replenished through the processing of purchased or manufactured item receipts into inventory. Receipt processing provides a continual update of inventory average, FIFO, lot, or last costs for every item. A variety of screen inquiries provide management analysis of MRP, shortage monitoring, reorder analysis, stock status, valuation, and critical items. Complete functionality includes:

- Alternate Parts Maintenance
- Costing Management
- Cost Tracking
- Country of Origin Tracking
- Cycle Counting and Physical Inventory Mgmt
- Global Trade Standards
- Lot Tracking and Lot Attributes Management
- Manufacturers Part Cross Reference
- Online Part Tracker
- Part Cross Referencing
- Part Master Price Breaks
- Physical and Perpetual Inventory
- RoHS Compliance
- Serial Tracking
- Serial Documentation
- Serial Number Tracker
- Serial Number Assignment to Parts
- Serial Number Formatting
- Voided Serial Capability
- Time-Phased Material Inquiry/Report
- Unit of Measure Definitions
- Control inventory and significantly reduce annual audit costs.

Advanced Material Management

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

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

Shipping and Receiving

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

- Manifesting and Freight Management
- Mass Ship
- Subcontract Parts Tracking
Receipt Tracking
Miscellaneous Shipment Tracking
Miscellaneous Receipts Management
Pack and Ship/Pack Out Processing
Pack IDs Management
Master Pack Tracking
Phantom Pack Shipping
Label Forms Creation
Auto-Print Integration
Customizable Shipping Labels
Shipping Performance Reporting

Warehouse Management
Epicor’s Warehouse Management System (WMS) leverages Epicor True SOA™, mobile ID data collection, and wireless communications to seamlessly link your warehouse with your order processing and manufacturing operations to optimize your pick, pack, ship, and receiving processes. Complete functionality includes:

- Bin Tracking
- Bin Wizard
- Warehouse Team Creation
- Customer Managed Inventory Visibility
- Supplier Managed Inventory Visibility
- Fulfillment Workbench
- Allocation Templates
- Wave Picking
- Cross Dock Tracking
- Paperless Picking
- Queue Handling
- Queue Manager
- Queue Tracking

Handheld

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

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

See improved inventory accuracy with wireless device management of inventory functions such as on the fly adjustments.
Epicor Financial Management offers a refreshing new approach to business—a suite of accounting applications built for the highly regulated post-Sarbanes-Oxley Act world built around a series of “global engines” that support effective financial management and control anywhere. Our goal is to help every business achieve sound financial management and control, from a single general ledger to the extended global enterprise. Epicor Financial Management gives you access to real-time fiscal information and provides the modern platform you need to support business around the world.

Global Engines

Epicor Financial Management is built around a series of unique global engines, which in turn support the global nature of business today, enabling effective operations in existing and new markets as necessary. At the heart of the Epicor solution, Epicor global engines are designed to add accounting agility and flexibility to your business while simultaneously allowing you to meet the local financial and legal compliance requirements of individual markets. Complete functionality includes:
- Rules-Based Posting Engine
- Configurable Tax Engine
- Legal Numbering Engine
- Multicurrency Engine
- Rounding Engine

General Ledger

Epicor General Ledger (GL) is the heart of Epicor Financial Management, processing and posting all accounting transactions created throughout Epicor applications, as well as entries made directly within the ledger. The information and controls which flow from the General Ledger system enable an organization to operate efficiently, comply with fiscal regulations, underpin strong corporate governance, and drive enterprise performance. This powerful GL application provides the accounting controls and system security necessary to help ensure the integrity of your company’s financial data. Complete functionality includes:
- Multiple Book Functionality
- Multiple Chart of Accounts
- Currency Reporting
- Multiple Reporting Currency
- Multiple Closing Calendars
- Calendar Adjustment Period
- User-Definable Chart of Accounts
- User-Definable Balance Controls
- Comprehensive Consolodations and Eliminations
- Robust Financial Report Writer
- Configurable Validation Rules
- Post-Year-End Transactions and Adjustments
- Inter-Company Journals
- Global Budget Updating
- Comparison Statements
- Automated Basic Allocations

Advanced Allocations

Advanced Allocations automatically computes cost and revenue allocations and the resulting journal calculations, streamlining processes, increasing relevance, and improving accuracy for shorter close cycles and more accurate financial statements. This module allows for sophisticated allocation of cost and revenue to multiple projects or departments or locations—ultimately to any entity represented in your corporate financial accounting structure. GL Allocations helps your finance staff to create, execute, retain, and reuse allocations to greatly simplify what can be an otherwise time-consuming and error-prone task. Additionally, an Allocation History Tracker provides a comprehensive view of each allocation run and all GL transactions created, as well as the ability to reverse allocations directly from the Allocation History Tracker.

*Available in US and Canada only—please check with your Epicor office for local solutions.
Accounts Payable

Accounts Payable (AP) allows you to enter supplier invoices for purchases that you make, then create payments for the invoices you want to pay. The system can generate payments for all invoices due, those for a particular supplier, or only for specific invoices. In addition, you can update both purchase orders in Purchase Management as well as actual job costs, as well as make adjustments if the purchase price does not match the invoiced price. Complete functionality includes:

- Invoice, Debit Memo & Payments Recording
- Recurring Entries Creation
- Payment instruments Tracking
- AP Terms and Conditions Support
- Voided Numbers Tracking
- Automatic/Manual Check Printing
- Direct Online Cost Updates
- Exchange Rate at Payment Entry Support
- Invoice Entry
- Debit Notes
- Interest Invoices
- Invoice GL Account Definition
- AR Transaction Adjustments
- Multiple Payment Instruments
- Consolidated Invoicing
- Invoice Logging
- Invoice Numbering
- Automatic Credit Holds
- Aging Information and Customer Reminder
- Automatic Finance Charge Calculation
- Bill-To Customer
- Manual Invoice Selection
- Credit Manager Workbench
- National Accounts (HQ Accounts)

Accounts Receivable

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

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

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
**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; reconcile your bank statement with entries generated in AR, AP, and payroll; and automatically upload electronic bank statements and autoreconcile them with the manual reconciliation of unmatched items. Perform manual allocation; enter ad hoc, non-AR, or non-AP statement amounts while in reconciliation routine. Complete Cash Management functionality includes:

- Soft Formats for EFT
- Petty Cash Management
- Cash Flow Dashboards
- Credit Card Processing
- Integration with Industry-Leading Providers
- Supports Industry Standards to Reduce Fraud
- Payment Card Industry Data Security Standard
- Credit Card Number Encryption
- Secure Online Credit Card Authorization
- Credit Card Number Validation
- Credit Card Format Validation
- Flexible Configuration
- Transaction Flexibility
- Reauthorize Reservation Transactions
- Transaction Reports
- Credit Card History Tracking

**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

Maintain accurate tracking and depreciation of company assets.
Epicor Enterprise Performance Management (EPM) is an end-to-end solution that removes the barriers to better business insight through a combination of intuitive user experiences, user driven key performance indicators (KPI), and pre-packaged analytics that have real meaning to the business. Epicor EPM leverages the advanced analytic capabilities of the Microsoft platform and incorporates modern Web 2.0 concepts for unprecedented ease of use and ultimately business results. Microsoft SQL Server Reporting Services (SSRS) underpins the Epicor EPM offering and provides a flexible reporting structure for delivering professional reports and analysis to business stakeholders in a format that business users can easily consume.

Trackers and Dashboards

Epicor Dashboards permit the combination of multiple capabilities such as inquiries, ad hoc reports, workbenches, graphical analyses, tactical business intelligence, alerts and business monitoring—all in a single dashboard. They provide a robust, one-stop interface that replaces traditional menu systems with personalized role or context-based views and links into core transactions of the system, including real-time, exception-driven indicator flags. Tooled with unique flexibility, Dashboards enable users to develop their own workbenches using a series of online views of information. From monitoring your employee intranet site to live access to industry-related Web sites, each Dashboard contains the information you and your employees need to more proactively run your business. Complete functionality includes:

- Role-Based Home Page
- Real-time Exception-Driven Management
- Real-Time Access to Up-to-Date Information
- User/Function-specific Workbenches
- Drill-Down Trackers
- User-Level Personalized Components
- Custom Component Generation
- Personalized Functionality
- Open to Related Functionality
- Fully Secured Web Interface
- Web Deployable Components
- Predefined Dashboards
- Dashboard Style Sheets
- Dashboard Crystal Reports®
- Dashboard Charting
- Executive Dashboards
- Dashboard Assemblies
- Self Contained Dashboards

Closely manage customer and supplier performance with comprehensive role-based and interactive Dashboards that offer a complete picture.
Advanced Financial Reporting
Epicor Advanced Financial Reporting (AFR) allows the creation and distribution of professional financial reports to company stakeholders. AFR simplifies report creation through an intuitive interface, which allows for the creation of reports using elements familiar to accountants or financial professionals, such as spreadsheet terms. It also provides an additional element of reporting hierarchy or trees, allowing the viewer to generate the report for a specific business segment. Viewers can generate these parameter-driven reports as needed by selecting the time, company, book, or organizational element as required without the need for financial team intervention. Complete AFR functionality includes:

- Graphical/Tabular Report Designer
- User-Defined Row Sets
- User-Defined Column Sets
- Reporting Tree
- Single Book or Multiple Book Reporting
- Consolidation of Enterprise-Wide Data
- Multi-Format Report Viewer
- Transaction-Level Drill Down

Budgeting, Planning, and Forecasting
For those companies that need advanced analytics, such as budgeting and planning or advanced forecasting, Epicor offers EPM Canvas Planning Server. This platform is extremely flexible and scalable and can easily handle large implementations across multiple installations, as well as managing mixed content from multiple sources. Canvas Planning can be used across a wide range of applications including financial, human resource, supply chain, capital planning, sales, profitability, and more. EPM Canvas Planning uses Microsoft Excel®, Microsoft SQL Server™, Microsoft SQL Server Analysis Services™ and EPM Performance Canvas Server to create a powerful platform for advanced and collaborative Budget, Planning and Forecasting—even for very large organizations. Complete functionality includes:

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

Manage, report, and distribute financial information securely.

Easily manage budgeting and planning with EPM Canvas Planning, Excel Planner.
Operational Data Store and Data Warehousing

Your Epicor next-generation enterprise applications offer far reaching business functionality that spans literally hundreds of business processes, backed by an ever-growing transactional database of information. Business performance is based not just on how these applications help run day to day processes but by how they support greater business insight—from historical reporting to advanced analysis. In order to manage this need, Epicor EPM offers a comprehensive set of tools that transforms your online transaction processing (OLTP) source data and turns it into actionable analytics. Complete functionality includes:

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

Scorecards and KPIs

Individual KPIs and combinations thereof, typically known as Scorecards, bring together high-level visualization of business processes and business events, so that you can monitor your organization and carry out benchmarking or performance based management. Many of the existing tools available today for KPI and Scorecard creation require data warehousing and the assistance of business for often lengthy project development. Even so, many scorecards remain static in terms of what they are measuring, and are not normally designed to handle ad hoc analysis. Complete scorecard and KPI functionality includes:

- Epicor EPM Canvas
- User-Friendly Design
- Multi-KPI Scorecards
- Multiple Scorecards
- Business-Specific Term Support
- Drag-and-Drop Info Display
- Multiple Canvas Support
- Microsoft SharePoint Canvas
- Web 2.0 Search Canvas
- Epicor Mobile EPM

Content Packs

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

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

**Risk Management**

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

**Security Management**

Epicor GRC provides comprehensive user and group security to restrict data and application accessibility as needed. Security can be granted at user and group levels for all security objects including forms, fields, reports, menus, and method calls. There is also an option to use Microsoft Windows® Authentication to support a Windows single sign-on and password policy. Complete functionality includes:

- Product Security
- Application Security
- Access Security
- Business Security
- Automated Change Logs
- Audit Logs
- Credit Card Authorization and Encryption

**Business Process Management**

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

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

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

Global Trade Compliance

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

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

Environmental and Energy Management

As the world continues to analyze energy availability, businesses, too, are turning their attention to areas of opportunity—reduction of carbon emissions, energy conservation and supply chain sustainability. Companies will look to IT and software solutions to help them find opportunities to extend the tangible benefits of corporate social responsibility (CSR) through the extended supply chain. Some of the more notable areas that corporations are placing emphasis on when deciding on a path to good environmental and energy management surround strategic sourcing and procurement, logistics, application of lean principles, and virtualization.
Technology is the foundation by which most businesses execute their objectives. At the same time, it is important that the technology does not overwhelm a business but operates seamlessly and effectively in the background. Today Epicor business architecture provides a rich user experience, affording opportunities for greater user collaboration and productivity. Offering new levels of extensibility and scalability, it is a technology asset that meets a company’s requirements today, yet remains flexible enough to accommodate opportunities in the future. This unique blend of tools and technology constitute the business architecture we call Epicor Internet Component Environment (ICE).

**Epicor ICE**

Epicor ICE is the business architecture that underpins the Epicor enterprise business software and offers a true service oriented architecture, Epicor True SOA. This agile business process-enabling technology builds on an already complete and robust framework. The toolset is helping our customers to both use and enhance Epicor applications at a business as opposed to a technology level—with minimum overhead. Epicor ICE addresses a number of key needs required by modern enterprises, including:

- Online Backup
- Complete Fail-Safe Options
- Corporate Social Responsibility Initiatives
- Scalable and Easy-to-Deploy Solutions
- Complete User Interface and Device Control
- Deployment Flexibility Across Most Major Operating Systems
- Built-In Customization Engine
- Comprehensive BPM Platform
- Composite applications Support
- Support for Subscription Technologies
- Web Services Integration
- Epicor True SOA & Platform Technology Independence

**User Experience**

Epicor ICE delivers user interface (UI) options that are at once easy to use, rich and intuitive, and give users choice in deployment and experience. Unique technology within Epicor ICE offers the ability to have multiple user interfaces interact with the same SOA-based business logic simultaneously including a “Smart Client,” a Web browser-based Client, or Microsoft Office applications. All UI options are intuitive, flexible, aesthetic, and promote user productivity.

**Epicor EveryWhere Framework**

Rather than rewriting our application forms to support mobile devices and the Web, We’ve developed the Epicor EveryWhere Framework, a unique technology that stores all client business logic as tagged XML metadata. This permits Epicor applications to run as smart clients or Web clients or on mobile devices, all from the same source code. This framework also ensures that user customizations and personalization remain intact, whatever the UI. Epicor ICE supports generation of asynchronous JavaScript and extensible markup language (AJAX) Web browser-based forms from existing Windows forms (C#). For added flexibility Web forms can be accessed from different mobile devices and browsers, including Microsoft Internet Explorer®, Mozilla® Firefox® or Apple® Safari® and can run on any operating system, including Windows, UNIX, Linux, or Mac. Complete functionality includes:

- Epicor Mobile Access
- Mobile Dashboards
- Support for BlackBerry & iPhone
- Epicor Smart Client
- Unlimited Comments
- Personalized Keyboard Shortcuts
- Tool Tips
- Simplified Navigation
- User-Defined Searches
- Comprehensive Cut-and-Paste
- Transaction Visualization
- Form Worksets and Navigation
- Advanced Grid Management
- Advanced Personalization
- Powerful Customization Engine
- Customization Wizard
- Dynamic User Defined Fields
- Global-Ready Localization
- External Update Method Added to All Business Objects
- Styling and Themes
Information Worker

According to current industry surveys, desktop productivity tools are used by 95% of business workers, with Microsoft Office as the standard for desktop applications. Epicor Information Worker provides a secure, seamless interface to your Epicor application from within Microsoft Outlook, Microsoft Excel, or Microsoft Word, blurring the lines between enterprise software and desktop productivity software to create a single immersive solution. With changes in ICE, the underlying architecture provides direct access to Updatable BAQs. Information Worker also is able to call Epicor Web Access forms as well as smart client forms from the Information Worker menus. Complete functionality includes the ability for authorized users to retrieve, view, and modify Epicor data; download the data you need directly into your Microsoft Office application without leaving your current task; and support for customer relationship initiatives.

Business Activity Query

Every business needs an intuitive and easy-to-use query engine, and for this Epicor created business activity query (BAQ), which allows you to create personalized queries or to copy standard queries. Once created, queries can be used throughout the application—to generate Crystal Reports, for quick searches, to support Portal views, or to view results in a Dashboard. Complete functionality includes:

- BAQ Design Wizards
- Graphical Table Links
- Use of Temp Tables and Variables
- Embedded Calculations
- Multiple Data Views
- Analyzer/Test Query Tabs
- Updatable BAQs
- Configurable Dashboard Applications

Epicor Portal

It is essential to have current enterprise data at your fingertips to make the decisions that drive your business to success. Epicor Portal can help by providing the framework and tools that allow you to gather and share enterprise data without having to depend on others. With Epicor Portal, you can get the information you need from your enterprise system when you need it, without having to wait in line. Complete functionality includes:

- Secure Data Access
- Easy-to-Use Data Visualization Tool
- Customizable Data Views
- Enterprise-Wide Collaborative Content Building
- Sharepoint Business Data Catalog Integration
- Instantly Actionable Views
- Unified Organizational View
- Epicor Portal Customer Content Pack
- Epicor Portal Supplier Content Pack
- Real Time Collaboration with Suppliers
- Secure Content Delivery

Epicor Everywhere provides a rich user experience over the Web.

The BAQ Designer provides many easy to use features for creating business queries.

Epicor Portal provides rich, compelling content to promote collaboration between employees, customers, or suppliers.
Business Process Management and Workflow Management

The workflow facilities available within Epicor enable you to quickly begin managing and automating even the most complex business processes, including working toward ISO certification. Epicor Workflow Management is comprised of five major components: Task Management, Workbench Views, Business Activity Management (BAM); and Business Process Management (BPM).

Task Management

Systematically automate and execute routine processes using a set of tools provided by Epicor. The inherent systematic nature of processing tasks via these tools contributes to the speed, consistency, accuracy, and ability to document procedures for regulatory compliance. Complete functionality includes:

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

Workbench Views

Workbenches provide a focused, paperless, single entry point from which internal and external users can automate and execute routine processes. Epicor comes with many predefined workbenches including buyers, planning, engineering, inspection, service, sales, credit manager, and plant workbenches.

Business Activity Management

Epicor extends Workflow Management with integral business activity management (BAM). BAM enables you to build simple proactive business rules into any of your system transactions and has four major components, including the Change Log, which allows you to identify key areas to track; Alerts, which immediately send an email notification alerting internal or external personnel when key transactions have been changed; Execute Processes, which automatically carry out a process to update other parts of the system when a key transaction has changed; and Manage Exceptions, allowing you to easily activate alerts to immediately gain control of expensive exceptions. Business Process Management (BPM)

- Seamless Integration and Workflow Capabilities
- Easy-to-Use Wizard Interface
- Pre-Process Condition Builder
- Post Process Routine Automation
- Customizable Base Process

Web 2.0

Substantial advances and the ongoing maturity of the consumer Web have brought new levels of productivity and self-evident usability to today's technology consumers. Even the rise in social computing and related technologies has an outlet in enterprise business software, and are manifested in capabilities such as enterprise search and presence. Epicor ICE merges these emerging technologies, often referred to as Web 2.0 with Epicor True SOA to deliver unprecedented support for harnessing knowledge, rapidly finding information, and taking collaborative actions upon it.

Enterprise Content Management

Enterprise content management (ECM) supports paperless operations and reduces document control costs by enabling users to easily add documents and retrieve information from nearly everywhere within the system. Epicor ECM delivers essential attachment/document management capabilities by extending them to include use of Microsoft SharePoint (Microsoft SQL Server™) document repositories. This means that document versioning is also supported along with the option to integrate to other best-of-breed document management systems. Complete functionality includes:

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

Enterprise Search

By utilizing Web 2.0 technologies and the building blocks of Microsoft Search, such as SQL Full Text Indexing, Epicor delivers Enterprise Search, a search tool with a Google-like interface that brings the personal Internet experience to the workplace. Enterprise Search provides embedded search
capabilities through tag clouds of Epicor structured data that span all Epicor applications built upon it, and extends beyond enterprise data, to un-structured data (Word documents, etc.) if desired, and in a secure manner. Complete functionality includes:

- Secure Search Results
- User-Definable Searching
- Easily Find Relevant Business Data
- Data Drill-Down Capability
- Complete Search Results in Browser
- Enterprise Data w/o Application License
- Epicor Administration Console-Based System Configuration

System Tools

Epicor ICE offers a series of system facilities and tools to enable the effective management of Epicor applications, extending to system security, document management, advanced software development, software deployment, and product documentation. Complete system tool functionality includes:

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

Security

Epicor’s comprehensive security features secure access to multiple companies without having to close all forms or carry out different logins when switching companies. Plus, Epicor ICE provides the option for Microsoft Windows Authentication and Windows Single Sign-on and Password Policy, as well as method security protocols to secure types of processing users are able to carry out (e.g., allow a user to update an existing part but not add a new part) by user or group. Complete Security features also include:

- Data Level Security
- Security Reporting
- Online Edits and Audits
- Date and Time (Using Server Time) and User Name for Auditing
- True Date/Time Field
- Advanced Software Development Kit
- Advanced Base Code Development Tools
- Complete Audit Control

Subscription Services

Epicor ICE extends RSS subscription capabilities to Epicor application data. This means that business users may subscribe to specific information that they wish to be kept appraised of. One area where this is enabled is within Epicor Portal, where the entire schema of Epicor applications is accessed for end-user query development and Web deployment. By subscribing to a particular query using RSS, users will see information proactively pushed to them when the data behind that query changes.

Mobile

Enabled by the Epicor Everywhere Framework, Epicor application Web forms generated from XML metadata, and their related linked business logic, can be accessed via mobile device. Additionally, Epicor EPM KPIs can also be deployed direct to mobile devices and include full search capabilities to rapidly find and drill-down to applicable data.

Epicor Enterprise Search delivers search options for relevant business information in a format similar to Google™.
Epicor Service Connect

Epicor Service Connect is a powerful business integration platform, functioning as a central integration point for secure workflow orchestrations within Epicor applications, as well as external connectivity to Epicor and non-Epicor applications. Because Epicor Solutions are built using Epicor True SOA, the power of Service Connect can be used to streamline processing within the application framework. Epicor Service Connect enables you to promote lean principles, continuous performance initiatives, and Six Sigma quality throughout the organization; incorporate workflow and system orchestration through visual designers with little to no programming effort; easily link and transform XML documents to map to different systems; quickly review and track in-progress processes or after the process completes with Service Connect workflow logs; and perform full dataset and multiple record updates in the same way as the Web service Update method processes data.

Epicor Documentation and Content Delivery

Epicor offers an approach to documentation and content delivery that puts relevant, context driven information in the hands of stakeholders and end users. This comprehensive solution set shortens your return on investment while maximizing utilization of your software investment. Epicor deploys a worldwide team of dedicated content writers and trainers to bring together the feature summary, online help, technical reference user guides, online training courses, and online tutorials through a single-source technology. Documentation and Content Delivery functionality includes:

- XML-based Content Delivery
- Comprehensive Feature Summary
- Robust Online Help
- Intuitive Field Level Help
- Customizable Help
- Layered Help
- Detailed User Guides
- Technical Reference Guides
- Embedded Courses
- Customization Toolkit

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

Epicor provides extensive educational materials including printed user guides.
Managing disparate business units offers unique challenges and opportunities with respect to centralized or distributed operational control, enterprise-wide visibility, inter-company supply chain management, and financial consolidation. To support the needs of today’s increasingly distributed business; Epicor offers robust global business functionality. However you choose to define your business, Epicor supports transactional functions between systems and entities including inter-company transactions such as inter-company orders, transfer orders, and shipments between plants and warehouses. Epicor facilitates these scenarios within a single application that is flexible enough to grow with you as you expand your business. Epicor Global Business Management offers organizations the essential tools needed to create and maintain a single version of the truth.

**Multicompany Management**

Epicor Multicompany Management capabilities can assist your business in consolidating operations, such as procurement and accounts payable, as well as offer enhanced tools to improve operational visibility across companies. Automation and recognition of inter-company financial transactions optimizes enterprise performance to shorten lead times on key product lines. Additionally, from a financial perspective, multicompany organizations may choose to not only report as individual entities, but also consolidate multiple currencies and report across business entities to a single consolidation company. Underpinning this functionality is a complete, scalable technology framework to support global enterprises that offers development choice, and includes a set of productivity enhancing tools designed for global business operations. Complete functionality includes:

- Multicompany Option Menu
- Define Global Customers, Parts, and Suppliers
- Company-Specific Credit Mgmt
- Automatic Forecasts
- Unique Accounts Establishment
- Centralized Payment Flagging
- Consolidated Purchasing
- Multicompany Financial Consolidation
- Multiple Currencies Mgmt
- Global Supplier Price Agreement Setup
- Multicompany Journal Entry
- Inter-Company Trading
- Inter-Company Eliminations
- Subcomponent Security
- Virtual View Builder
- Unlimited Hierarchy
- Scalable Deployment
- Robust Messaging Engine

Create user and role profiles across companies and move effortlessly between them using simple menu hierarchies.
Multicurrency Management
Multicurrency Management automates the process of both buying, and selling in foreign currencies, including tracking of default currencies as well as extensive exchange rate tables. Lock transactions in at a specified rate with automatic gain or loss reporting, reducing the guesswork from handling foreign transactions. Throughout Epicor, the currency symbol is displayed notifying the user of the currency being used. Complete functionality includes:
- GL-Level Revaluation Options
- Multiple Currency Tables
- Definable Exchange Rate Update Scheduling
- Gain/Loss Reporting
- Base Currency Reporting
- User-Definable Bank Accounts
- Customer Price Lists
- User-Definable Base Currency Quotations
- Default Base Currency Customer Orders
- Default Base Currency Service Contracts
- Default Currency Invoicing
- Default Currency Cash Receipts
- Supplier Price Breaks Tables
- Default Currency Purchase Orders
- Accounts Payable
- Base Currency Check Box

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 Epicor’s robust multi-plant functionality. Complete functionality includes:
- Sourcing by Plant
- Comprehensive Production Plant Visibility
- Virtual Plant Support
- Shared Warehouses
- Costing Workbench - Cost by Plant
- Alternate BOMs and Routings Per Plant
- Multi-Plant Scheduling Functions
- Subcomponent Security

Multilingual Data Management
Corporate growth and expansion inevitably leads to new markets and new geographies. Epicor Multilingual Management, alongside Epicor Global Configurable Engines, facilitates this growth, with resources that can manage your business wherever you take it, or it takes you, with support for country-specific requirements around tax, currency, and languages. Complete functionality includes Epicor Layered Client Framework, which separates the language of the business logic from the language of the end-user interface, allowing you to operate your business seamlessly in any language.
Master Data Management

The recent emphasis on regulatory compliance, the advent of SOA, and mergers and acquisitions has made the creation, stewardship, and maintenance of accurate and complete master data a business imperative. Epicor Master Data Management (MDM) can help to ensure that your Multicompany and Multisite data meets regulatory requirements and also provides the consistency needed for real-time distributed operations, leading to greater customer satisfaction, operational efficiency, and business performance. Complete Master Data Management functionality includes:

- Extensible Markup Language Support
- Powerful Transformation Engine
- Local and Global Management
- System Independent Data Hierarchies
- Field-Level Management

Epicor Service Connect

Epicor Service Connect is a powerful business integration platform, functioning as a central integration point for secure workflow orchestrations within Epicor applications, as well as external connectivity to Epicor and non-Epicor applications. Because Epicor Solutions are built using Epicor True SOA, the power of Service Connect can be used to streamline processing within the application framework. Business components, represented as Web services outside of the application, can be recomposed within Service Connect to eliminate non-value added steps or potentially speed up any process. For example, processing sales orders typically involves multiple availability inquiries, reviews, inventory release decisions, and so forth. Orchestrating this process within the Service Connect Workflow Designer eliminates many of these steps by routing processes to automated tasks, such as order-submit-direct-to-pick for specific inventory items or order fulfillment for your best customers.

Exploiting the Value of Epicor True SOA

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Eliminate the technology, integration, and accessibility barriers that stifle productivity.

About Epicor

Epicor Software is a global leader delivering business software solutions to the manufacturing, distribution, retail, hospitality and services industries. With 20,000 customers in over 150 countries, Epicor provides integrated enterprise resource planning (ERP), customer relationship management (CRM), supply chain management (SCM) and enterprise retail software solutions that enable companies to drive increased efficiency and improve profitability. Founded in 1984, Epicor takes pride in more than 25 years of technology innovation delivering business solutions that provide the scalability and flexibility businesses need to build competitive advantage. Epicor provides a comprehensive range of services with a single point of accountability that promotes rapid return on investment and low total cost of ownership, whether operating business on a local, regional or global scale. The Company’s worldwide headquarters are located in Irvine, California with offices and affiliates around the world. For more information, visit www.epicor.com.