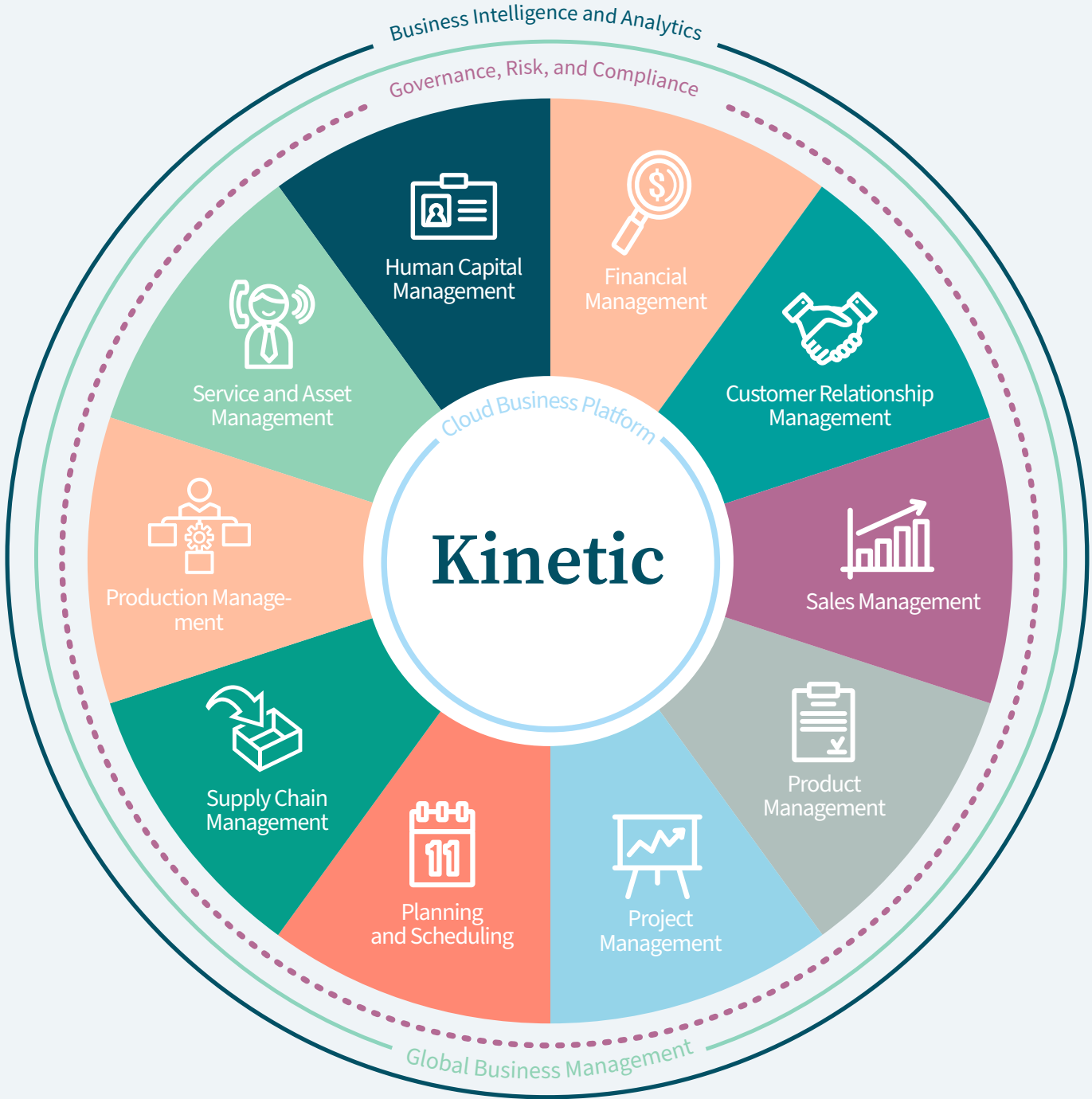**EPICOR**

Product Management

Human Capital Management

- Core HR
- Global HR
- Candidate Self-Service
- Employee Self-Service
- Talent Management
- Training and Development
- Position Control
- Timesheets

Service and Asset Management

- Service Management
- Returned Material Authorization
- Service Contract and Warranty Management
- Case Management
- Maintenance Management
- Field Service Management

Production Management

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

Supply Chain Management

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

Planning and Scheduling

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

Financial Management

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

Customer Relationship Management

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

Sales Management

- Estimate and Quote Management
- Order Management
- Sales Order Automation
- EDI/Demand Management-Point of Sale
- Commerce Connect
- Dealer Network Portal
- Configure Price Quote

Product Management

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

Project Management

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

Governance, Risk, and Compliance

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

Cloud Business Platform

- Mobile, Browser-based Experience
- Virtual Agent
- Collaborate
- Enterprise Search
- Epicor Learning
- Business Process Management
- Enterprise Content Management
- Business Workflow Automation
- IoT and IIoT Applications
- eCommerce Platform
- EDI and B2B Integration
- Electronic Reports Engine
- Application Studio Configuration
- REST Services and Epicor Functions
- Updatable Dashboards
- Epicor Integration Cloud
- Deployment Flexibility
- Microsoft Azure Cloud
- Security Management

Business Intelligence and Analytics

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

Global Business Management

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

Contents

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

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

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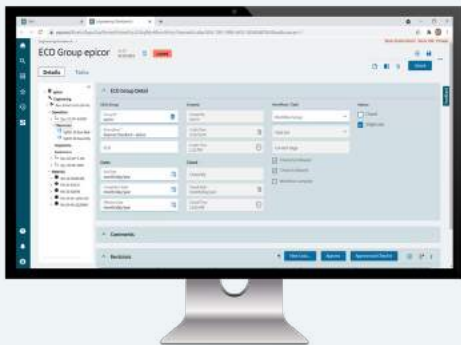
Methods of Manufacturing

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

Bill of Materials (BOM)

Epicor supports traditional BOM management with single-level part formats that recognize the materials and components required to build end parts. In addition, Epicor supports multilevel BOM management that incorporates not only single-level components and material requirements, but also internal and external routing steps for complete end to end assembly visibility, planning, scheduling, and costing. Epicor supports visual engineering technology with indented tree structures and drag-and-drop BOM management. Easily create new BOMs with functionality that enables the user to pull an existing method of manufacturing for a product and make modifications for future runs or similar products. Use alternate BOMs to predefine multiple BOM structures for the same part with material or component substitutions. In a multi-plant environment, BOMs at the plant level facilitate choices of where to build the part using plant appropriate methods. Optionally have several BOMs within a plant, allowing the planner to choose the most cost-effective build. Gain the ability to store multiple reference designators on BOMs. You can also obtain explosion reports by component and by reference designator from quotes, jobs, and the engineering workbench.

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

Routings

Detailed routings facilitate planning, scheduling, and costing of products more efficiently. Everything needed to produce a product is managed in one central location. Managing changes to routings is simplified. Changes are automatically communicated to the plant floor execution system and operators have online visibility of the latest routing production notes, as well as standards and resource requirements. Easily understand, navigate, and revise even the most complex, multilevel routing in the tree structure of the engineering workbench. Free up engineers to focus on constructing the most cost-effective build. Quickly build new routings and easily modify existing routings using the Epicor drag-and-drop engineering tools. Alternate routings allows the definition and maintenance of multiple routings or material substitutions under a single part number. In a multi-plant environment, alternate routings at the plant level facilitate choosing where to build the part using plant appropriate methods. Manage and measure jobs with flexible production standards using traditional time-based production standards—including pieces per hour, hours per piece, pieces per minute, minutes per piece, operations per hour, fixed hours, and operations per minute. You also have the ability to allow planning by volume and quantity using dimensional planning that is not time constrained

Engineering Change and Revision Control

Achieve control and consistency in your engineering change and revision process. Engineering Change and Revision Control is designed to enable engineering change management, multiple revision control of products, and engineering workflow management, and it offers detailed cost analysis of products during the engineering process. The engineering workbench gives engineers an area to manage all engineering tasks related to the modification, review, and approval of assemblies—including full revision updating and control, check-out procedures, security, engineering change orders, BOM maintenance, what-if BOM maintenance, what-if cost rollups, adding parts, placing parts on hold, and product routing maintenance. The engineering workbench also enables engineers to drill into all related information, like jobs, inventories, sales orders, and quotes.

Document Management

Epicor drag-and-drop attachments support the ability to manage and view attachments against any record or application process. With respect to BOMs, additional functionality exists to allow attachments linked to end products and components to automatically flow to

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

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

CAD Integration

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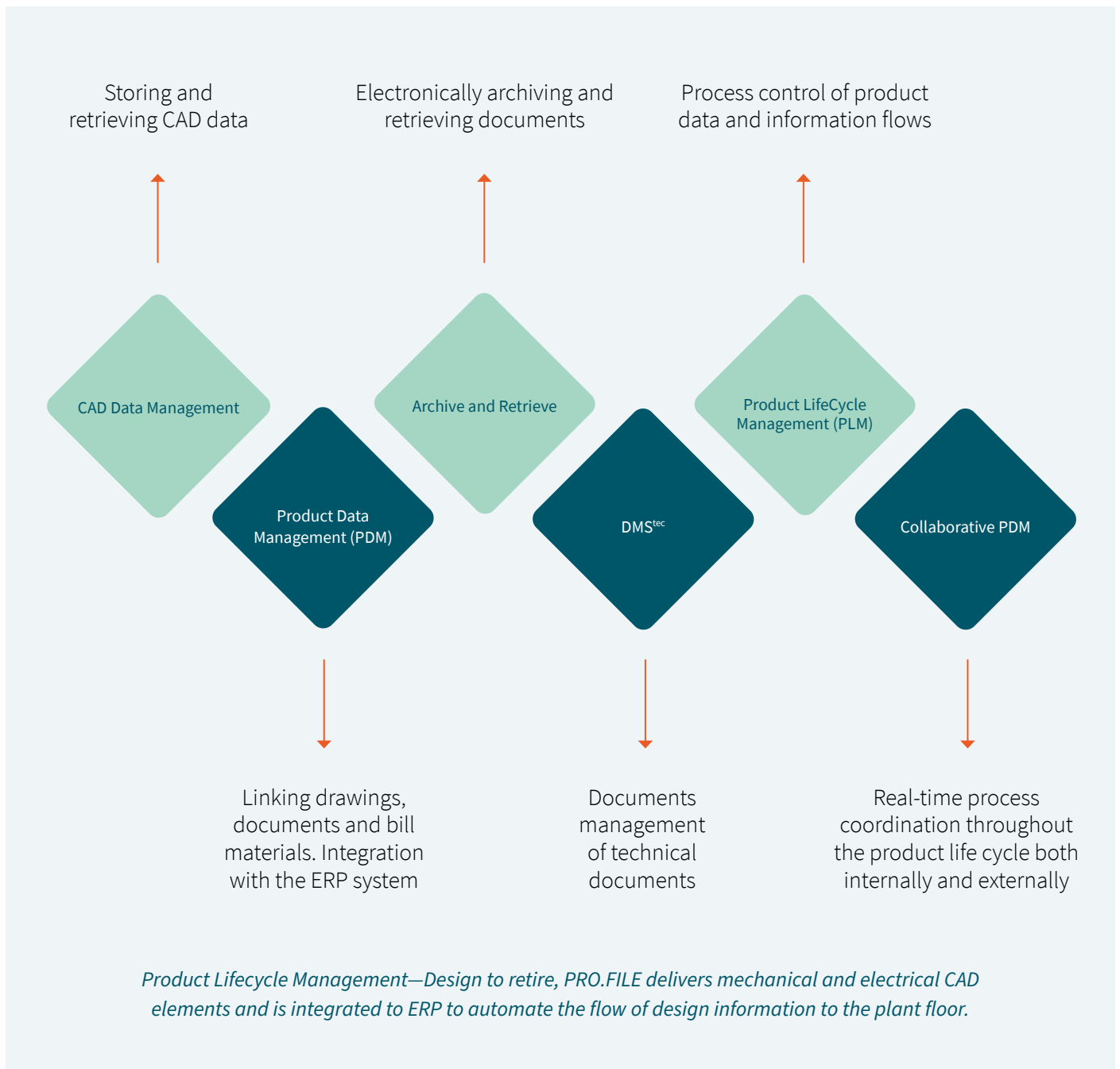

Product Lifecycle Management

PRO.FILE is the PLM/PDM platform for the digitalization of all product engineering and product management processes and all document-based workflows in technical industries. Take your product engineering and product management to next level. Seamlessly manage your mechanics, electrical, electronics and software disciplines on a single, unified platform. Build a digital information twin to manage all of your product-related information – from inception to ongoing service delivery. This will enable you to engage in true enterprise-wide digital engineering and product management along the entire lifecycle PRO.FILE manages all documentation associated with a product throughout its entire product lifecycle and includes full integration with numerous computer aided design (CAD) systems and various electronic design automation (EDA) systems. It is particularly useful for companies that design what they manufacture, want standardized methodologies around workflow, use CAD or EDA systems, or use drawings to produce a quote or an order. PRO.FILE delivers a seamless experience that enables users from all business units to access the same data backbone for all of their different needs. This provides them with insight into the relationships between your product data, accompanying documents, and emails, which in turn results in transparent processes, satisfied customers, and compliance confidence.

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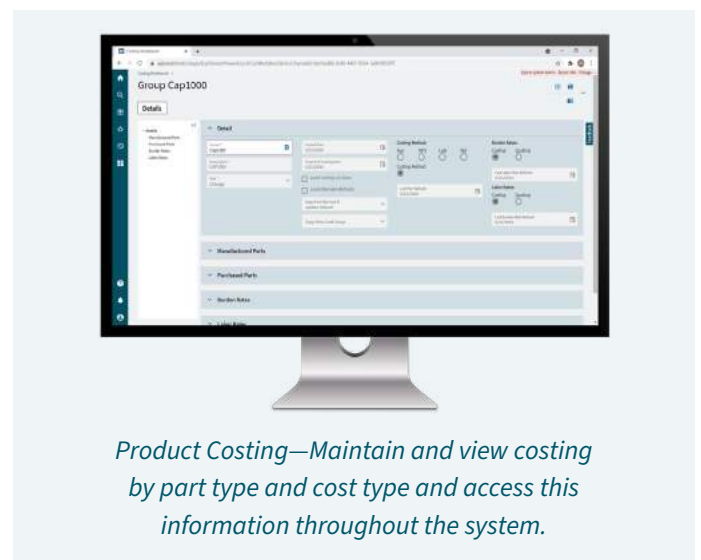
Product Costing

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

Storing and
retrieving CAD data

Electronically archiving and
retrieving documents

Process control of product
data and information flows

CAD Data Management

Archive and Retrieve

**Product LifeCycle
Management (PLM)**

**Product Data
Management (PDM)**

DMStec

Collaborative PDM

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

Documents
management
of technical
documents

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

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

Product Configuration

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

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

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

EPICOR

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

Contact Us Today: info@epicor.com | www.epicor.com