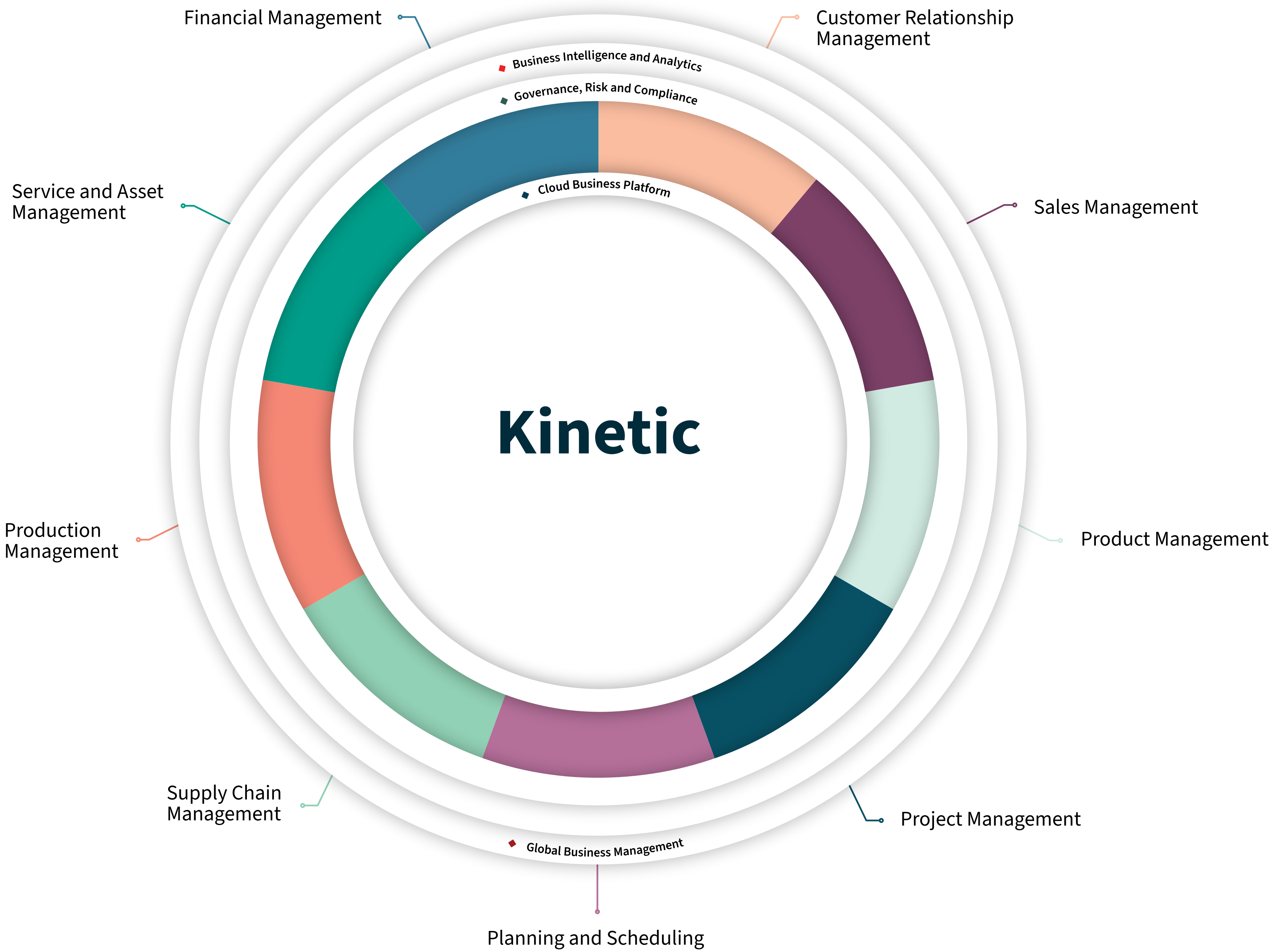
EPICOR
en>compass

Supply Chain Management

MANUFACTURING


Financial Management
Customer Relationship Management
Business Intelligence and Analytics
Governance, Risk and Compliance
Cloud Business Platform
Service and Asset Management
Sales Management
Kinetic
Production Management
Product Management
Supply Chain Management
Project Management
Global Business Management
Planning and Scheduling

Financial Management

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

Sales Management

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

Project Management

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

Supply Chain Management

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

Customer Relationship Management

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

Product Management

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

Planning and Scheduling

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

Production Management

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

Service and Asset Management

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

Governance, Risk and Compliance

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

Global Business Management

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

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

Cloud Business Platform

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

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

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

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

Purchase Management

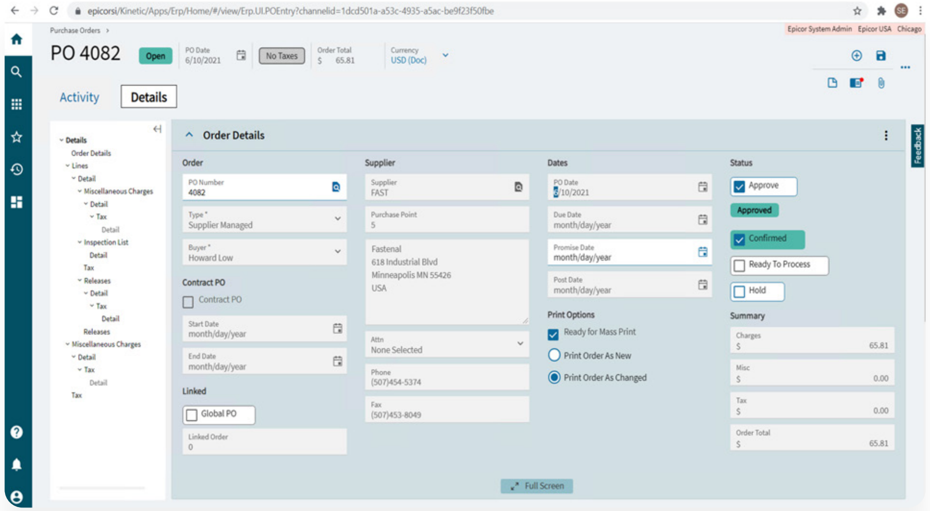
Purchase Management handles purchase order writing and the tracking of supplier performance to optimize results and improve negotiations. Multiple detailed line items indicate planned receipts to inventory or a job, direct receipts to a sales order, or direct receipts to a manufacturing job, although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

Purchase Management capabilities include:

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

Purchase Contracts

Purchase Contracts is designed to automate the process of purchasing inventory items on a recurring basis—including the establishment of recurring delivery schedules. Contract line items can be assigned to purchase orders, which automates your delivery schedules with delivery dates, prices, and corresponding quantities. Automatic requirement calculations— based on generated PO suggestions—are factored into delivery schedules, which you can adjust automatically to conform to supplier requirements or help with inventory control, production efficiency, and business expediency. Complete functionality includes part schedule maintenance for establishing the combination of part, plant, and calendar that makes up the part schedule, as well as periodicity code maintenance to establish the rules and terms under which orders periodically arrive from suppliers.



epicorsi/Kinetic/Apps/Erp/Home/#/view/Erp.UI.POEntry?channelid=1dcd501a-a53c-4935-a5ac-be9f23f50fbe

PO 4082 — Open — PO Date 6/10/2021 — No Taxes — Order Total $ 65.81 — Currency USD (Doc)

Order Details

Order
PO Number: 4082
Type *: Supplier Managed
Buyer *: Howard Low
Contract PO: ☐ Contract PO
Start Date: month/day/year
End Date: month/day/year
Linked: ☐ Global PO
Linked Order: 0

Supplier
Supplier: FAST
Purchase Point: 5
Fastenal
618 Industrial Blvd
Minneapolis MN 55426
USA
Attn: None Selected
Phone: (507)454-5374
Fax: (507)453-8049

Dates
PO Date: 6/10/2021
Due Date: month/day/year
Promise Date: month/day/year
Post Date: month/day/year

Print Options
☑ Ready for Mass Print
○ Print Order As New
● Print Order As Changed

Status
☑ Approve
Approved
☑ Confirmed
☐ Ready To Process
☐ Hold

Summary
Charges: $ 65.81
Misc: $ 0.00
Tax: $ 0.00
Order Total: $ 65.81

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

Advanced Requisition Management

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

Supplier Connect

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

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

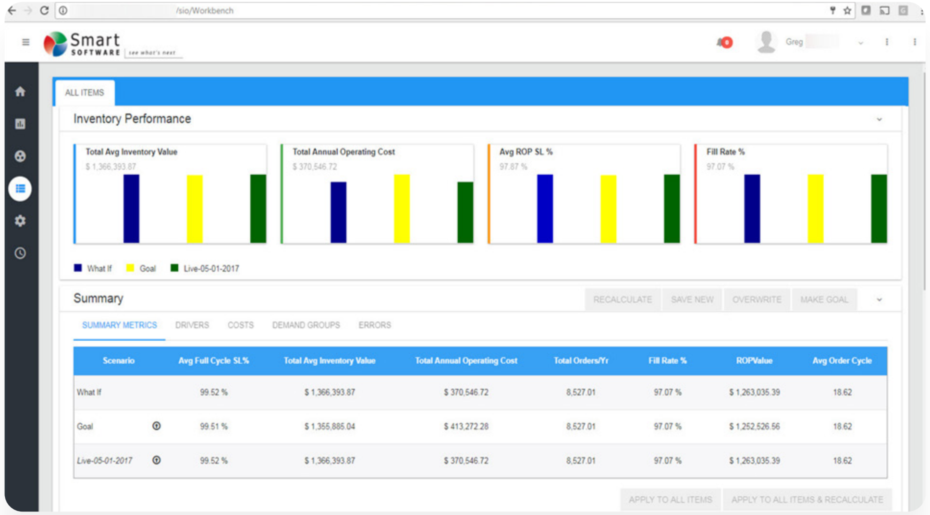
Supplier Relationship Management

Supplier Relationship Management (SRM) provides tools for buyers, procurement staff, and purchasing agents, to request quotes for raw materials or subcontract services from one or multiple suppliers. Request for quotes (RFQs) are generated with one or more lines, allowing you to evaluate the responses from suppliers to decide which businesses can provide your company with the quantities, price points, and delivery dates you need for your manufacturing and servicing business flow.

Supplier RFQ responses automatically build or add to existing part price-break tables with current effectivity dates to be used in other Epicor applications.

Epicor Supplier Portal

Integrates your suppliers with your Kinetic solution quickly and seamlessly. It provides either an integration solution (for suppliers who can connect to you) or a web portal (for suppliers who can't) through which you and your suppliers can communicate in an easy-to-understand, human-readable format — not 'EDI speak'. You can view documents and status information about sourcing requests and graphical charts that provide insights into EDI data.



Scenario	Avg Full Cycle SL%	Total Avg Inventory Value	Total Annual Operating Cost	Total Orders/Yr	Fill Rate %	ROPValue	Avg Order Cycle
What If	99.52 %	$ 1,366,393.87	$ 370,546.72	8,527.01	97.07 %	$ 1,263,035.39	18.62
Goal	99.51 %	$ 1,355,885.04	$ 413,272.28	8,527.01	97.07 %	$ 1,252,526.56	18.62
Live-05-01-2017	99.52 %	$ 1,366,393.87	$ 370,546.72	8,527.01	97.07 %	$ 1,263,035.39	18.62

Epicor Smart Inventory Optimization —Easily visualize your inventory performance reports and share with key stakeholders

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

Note: Refer to the "Cloud Business Architecture" chapter for more information about the Epicor EDI solution for EDI and B2B integration.

Inventory Management

Inventory Management provides the key functions necessary to update and maintain raw materials, work in process (WIP), finished goods inventory quantities, costs, and on-hand requirements. Issued inventory reduces quantities on hand, which are continually replenished through the processing of purchased or manufactured item receipts into inventory. Receipt processing provides a continual update of inventory average, FIFO, lot, or last costs for every item. A variety of screen inquiries provide management analysis of Materials Requirements Planning (MRP), shortage monitoring, reorder analysis, stock status, valuation, and critical items.

Functionality also includes:

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

Package Control

Package Control functionality allows you to track, manage, or transact a group of items via a unique identifier, the Package Control ID (PCID). Track any item from receipt into a site, the movement of an item throughout the site, the shipment or transfer of that item to another site, and eventually the shipment of that item to the customer.

Also supporting the inbound generation of PCIDs, Kinetic allows you to reserve and allocate PCIDs for sales orders, issue material to jobs, produce PCIDs from jobs, transfer PCIDs from one site to another, and receive PCID finished goods in inventory to complete processing transactions. Perform pick and unpick transactions, shipping transactions, and job receipt to inventory transactions—among others—against a unique PCID.

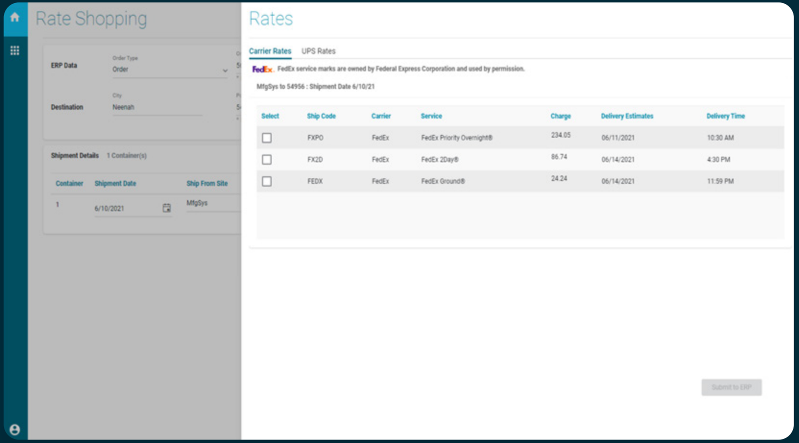
PCIDs have an associated set of predetermined or user-defined physical and controlling characteristics, which comprise the package itself (properties and contents) and the label. Each can have its own rules of control, process flow, and status to give you greater control and visibility into your supply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

Shipping and Receiving

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

Complete functionality also includes:

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



ERP Data — Order Type: Order

Destination — City: Neenah

Shipment Details 1 Container(s)

Container	Shipment Date	Ship From Site
1	6/10/2021	MfgSys

FedEx service marks are owned by Federal Express Corporation and used by permission.

MfgSys to 54956 : Shipment Date 6/10/21

Select	Ship Code	Carrier	Service	Charge	Delivery Estimates	Delivery Time
☐	FXPO	FedEx	FedEx Priority Overnight®	234.05	06/11/2021	10:30 AM
☐	FX2D	FedEx	FedEx 2Day®	86.74	06/14/2021	4:30 PM
☐	FEDX	FedEx	FedEx Ground®	24.24	06/14/2021	11:59 PM

Quick Ship—Quick Ship simplifies freighting and shipment to customer specifications.

Quick Ship

Today's customers have many different shipping options. Quick Ship, a multicarrier shipping software for Epicor Kinetic streamlines domestic and international shipping processes to help you meet your customers' demands. From rate shopping at order entry to manifesting your domestic or international shipments, Quick Ship communicates with various carriers and provides the information about that shipment back to the ERP platform. As part of the shipping function, Quick Ship prints labels, bill of ladings, and export documents to be included with your shipment.

Capabilities include:

- Support for multiple carriers / account numbers in one system
- Rate Shopping
- Data Mapping Tool
- Bill of Lading Generation
- Automated blind shipping
- Automated email notification
- Automated hazmat paperwork
- HazMat compliance software integration (DGIS)
- Best way and routing guide
- Consolidated shipments
- International shipments and documentation
- Print or email return labels
- Rate import tool for custom carriers
- Transfer orders
- Configurable handling fees
- Mass shipping
- EEI/ACE integration
- Navisphere integration for simplified carrier negotiation
- Language translations
- Currency conversion for freight charges
- Central storage of shipping documents
- ITAR and carrier compliance
- Automated drop shipments
- LTL and custom carriers

Warehouse Management

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

Functionality includes:

- Bin management
- Warehouse team creation
- Fulfillment workbench
- Allocation template

- Wave picking
- Cross-dock tracking
- Paperless picking
- Queue management

Lot Tracking and Attributes

Help improve supply chain efficiency with full visibility of parts by lot throughout your system. Record material received, keep traceable material on-hand, and maintain detailed usage information by lot with the option to auto-generate lot numbers based on part-specific rules. Additional lot attributes can also be stored for each part lot, which include Batch, Manufacture Lot, Heat Number, Manufacture Date, Expiration Date, Firmware Version, Cure Date, Best Before Date, etc.

Serial Tracking

Serial tracking helps to ensure product traceability, allowing for greater control over parts within the facility. Comprehensive functionality ranges from no serial tracking to full serial traceability of each recorded move of a part and its components.

Optionally, you can record serial numbers at the outbound stage only. This is particularly useful for companies that must record what serial numbers have been shipped to which customers and when, but have no need to undertake the overhead costs of recording serial numbers as inventory moves around the warehouse or internal production facilities.

Serial Tracking for Revision and Attribute Tracked Parts

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

Customer-Managed Inventory

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

Supplier-Managed Inventory

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

Smart Inventory Planning and Optimization

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

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

Advanced Unit of Measure

Selling items with many dimensional attributes can be complex and make it difficult to implement ERP. For these manufacturers and distributors, Epicor offers Advanced Unit of Measure (UOM) capabilities that reduced the complexity of implementation by reducing the amount of configuration needed to fit these unique needs. The benefit of Epicor Advanced UOM functionality is that it delivers a simplified approach to finding the right inventory by segmenting inventory with inventory attributes such as hardness, strength, modulus of elasticity, or density. Because the inventory is segmented, it is easily located, physical counts are more meaningful, and the business can plan inventory needs at the attribute level, ensuring accurate supply and demand are met. Furthermore, Advanced UOM offers dynamic attributes to help businesses manage conversion between units of measure. For example, pounds or grams to feet, meters, or each. Both the theoretical size (4 meters length) and optional actual size (4.1 meters) can be converted to the accurate weight measures. This is powerful and useful in purchasing and selling in one unit of measure while managing inventory and production in another. Advanced UOM delivers these transactions in dual units of measure, giving greater visibility and accurate cost throughout with the simplicity of transacting in a number of pieces rather than counting out the weight or meters.

Advanced Materials Management

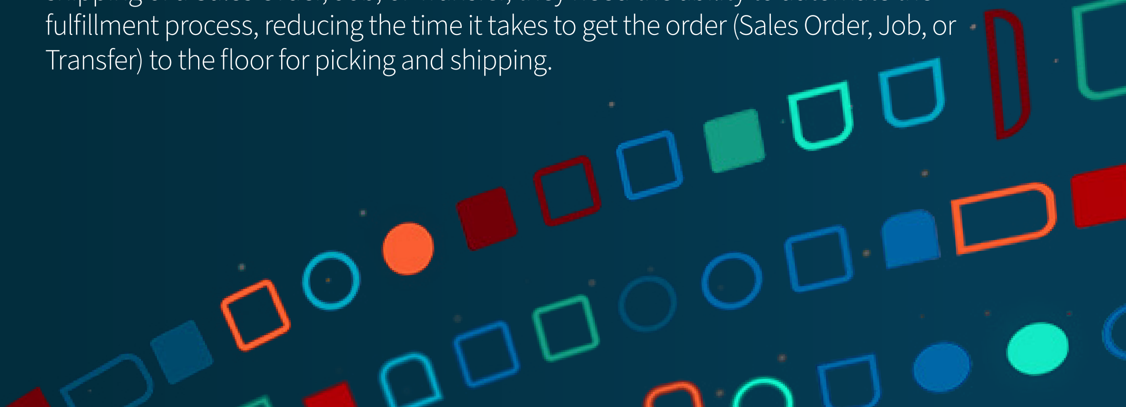
Advanced Material Management (AMM) enables businesses to produce electronic requests for materials, dispatch those materials, and track inventory movements of all inventory—including raw materials and work in process. Using wireless terminals and bar coding technology, you are able to track inventory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

Complete functionality includes:

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

Automated Fulfillment

Automated fulfillment is the ability to develop fulfillment automation rules that are applied during the allocation process to automatically allocate sales orders. Customers can automate the fulfillment process, leading to less legwork for quicker fulfillment processes. To greatly improve the ability of customers to expedite the shipping of a Sales Order, Job, or Transfer, they need the ability to automate the fulfillment process, reducing the time it takes to get the order (Sales Order, Job, or Transfer) to the floor for picking and shipping.



Wireless Warehouse

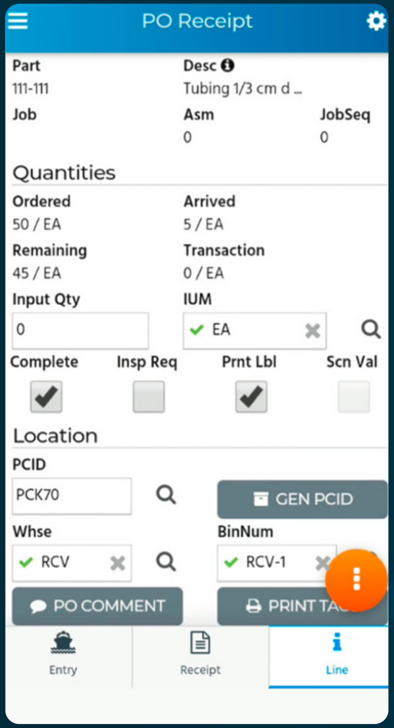
Wireless Warehouse is our handheld application which offers a modern, intuitive user interface for warehouse and distribution functions. The application optimizes workflow for fast and accurate scanning, improves time to process transactions, increases accuracy, and reduces errors. It is compatible with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

Capabilities include:

- Receiving of inbound containers, purchase orders, intercompany and transfer order receipts.
- Core warehousing functions allowing users to initiate adjustments and movements from the warehouse floor; conduct cycle counts, and stock takes.
- Picking of items assigned to a material queue, grab items from the available queue, or return items back to the queue.
- Unpicking of sales or transfer orders
- Automated workflows triggered by scan events.
- Complex sort and filter options
- Part and Bin level validation
- Configurable scan validation
- PCID management including builds, splits, and merging
- Processing of outbound shipments direct from the device.
- Paperless Proof of Delivery with sign-on glass signature and photo capture
- Delivery route optimization and navigation

Proof of Delivery

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



PO Receipt

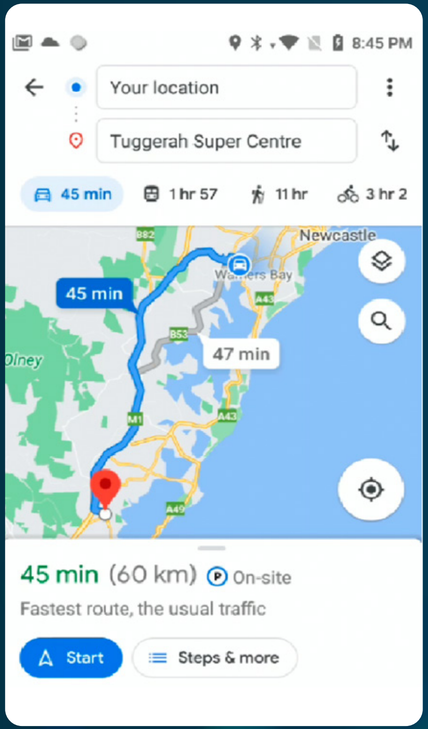
Part: 111-111
Desc: Tubing 1/3 cm d ...
Job:
Asm: 0
JobSeq: 0

Quantities
Ordered: 50 / EA
Arrived: 5 / EA
Remaining: 45 / EA
Transaction: 0 / EA
Input Qty: 0
IUM: EA

Complete ☑ Insp Req ☐ Prnt Lbl ☑ Scn Val ☐

Location
PCID: PCK70
Whse: RCV
BinNum: RCV-1

Wireless Warehouse application provides a modern and intuitive user experience on Android devices.



8:45 PM
Your location
Tuggerah Super Centre

45 min (60 km) On-site
Fastest route, the usual traffic

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

We're here for the hard-working businesses that keep the world turning. You're the companies that make, move, and sell the things we all need. Trust Epicor to help you do business better. Your industry is our industry, and we understand you better than anyone. By working hand-in-hand, we get to know your business almost as well as you do. Our innovative industry solution sets are carefully built to fit your needs and respond flexibly to your fast-changing reality. We accelerate ambitions, whether you want to grow and transform, or simply become more productive and effective.

That's what makes us the essential partner to the world's most essential businesses.

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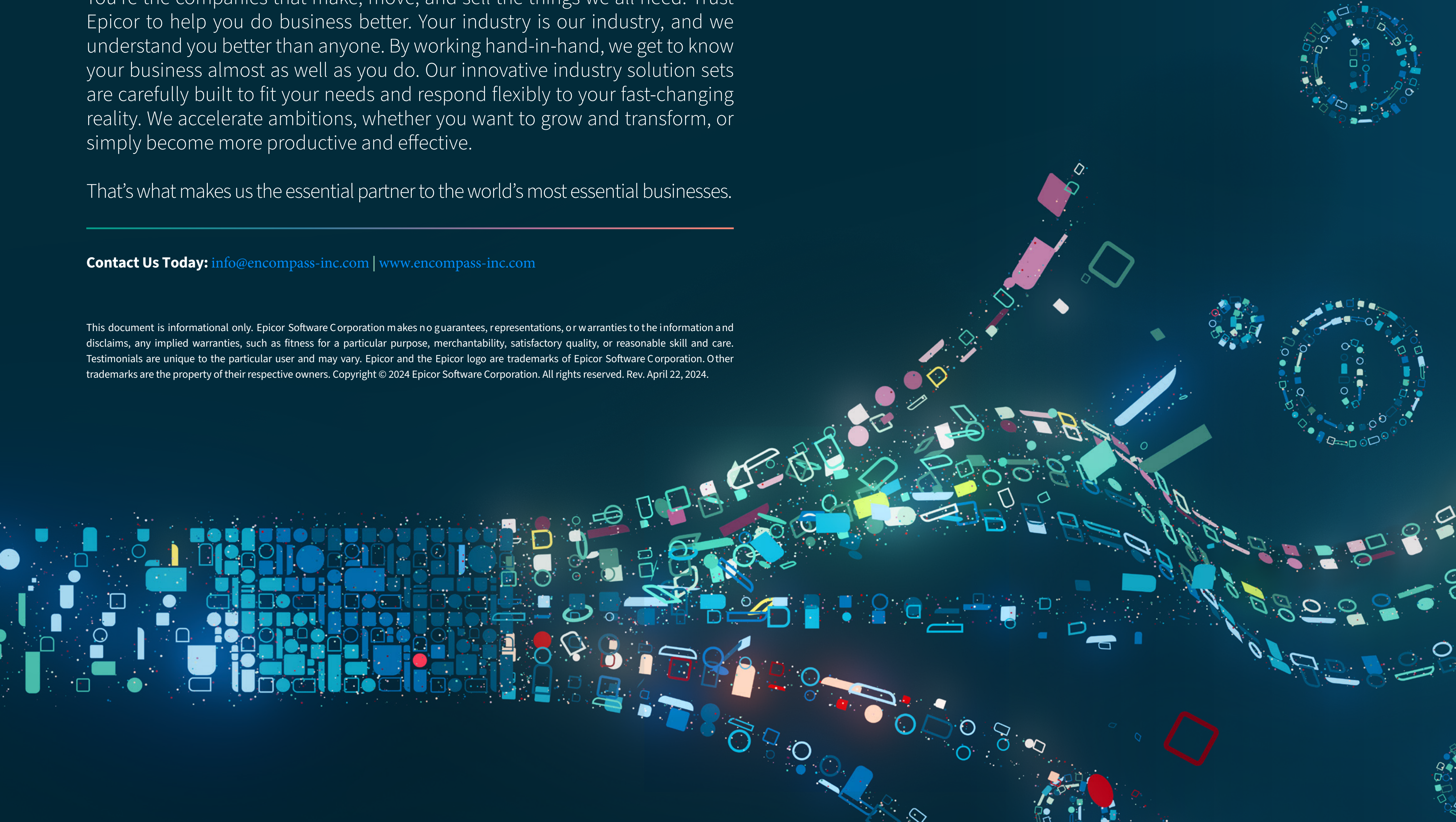This document is informational only. Epicor Software Corporation makes no guarantees, representations, or warranties to the information and disclaims, any implied warranties, such as fitness for a particular purpose, merchantability, satisfactory quality, or reasonable skill and care. Testimonials are unique to the particular user and may vary. Epicor and the Epicor logo are trademarks of Epicor Software Corporation. Other trademarks are the property of their respective owners. Copyright © 2024 Epicor Software Corporation. All rights reserved. Rev. April 22, 2024.