Epicor

Supply Chain Management

Inspiring business means effectively connecting your supply chain, enabling productive customer and supplier collaboration, and perfectly fulfilling demand.
Supply Chain Management

Linking the 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 provides the most effective coordination from initial raw materials to the ultimate consumption of the finished product by providing the visibility you need throughout your value chain.

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.

Mass Purchase Order Receipt
Quickly create receipt details for all lines, all releases for a specific line, or individual lines and releases.

Multiple Location Receipts
Receive individual lines or line releases to different locations for multi-site organizations with centralized buyers.

Part Master Price Breaks
Create price breaks, including effectivity date per inventory part or supplier.

Purchase Requisition
Request purchases from anywhere in the plant. A formal requisition system tracks the status of the requisition, from initial request to final approval and actual purchase order. The requestor is notified each step of the way.

Advanced Requisition Management
Every well-balanced supply chain maintains a budget and control over items requisitioned for each stocking location. Epicor Advanced Requisition Management (ARM) enables organizations to gain visibility and control of procurement spending by providing an online workflow and purchase requisition tool. It gains information on their spending which 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. Epicor ARM is fully automated and improves communication and efficiency across the supply chain.

Purchase History
Access detailed information on purchase orders and receipts over extended periods of time from purchase history.

Purchase Order Printing
Print purchase orders directly from PO entry by date, user or purchase order number range. Purchase orders also may be faxed directly from your computer to your supplier.

Approved Suppliers
Approve suppliers before anything can be ordered from them. To accommodate customers that insist upon using specific suppliers, Epicor allows you to define those relationships, and prevents ordering from the wrong supplier for those jobs.

Automated Purchasing Tools
Automate part suggestions, quantities, and suppliers to buy from in order to meet material requirements and on-time delivery schedules. Optionally create new POs automatically.

Cross-Referencing
When a supplier's part number differs from the stocking part number, link the cross-reference in the suggested supplier file for printing on purchase orders.

Enter, approve, and confirm purchase orders with multiple line items and releases.
Purchase Order Tracker
Immediately access all purchase order information via screen inquiry, with multiple search capabilities.

Supplier Tracker
Quickly display information about any supplier, including open and historical purchasing transactions.

Supplier Connect
It's not just your customers who can use Epicor Commerce Connect, your suppliers can too. By providing the means for self service on a whole range of enquiries (such as open orders, part information and access to old invoices), Epicor Commerce Connect eliminates the need for inquiries to come in via either e-mail, phone or fax—significantly reducing the amount of time staff need to spend on answering them.

Supplier Connect also allows for suppliers to update their information via their own supplier portal, answer requests for information and confirm changes to purchasing orders. It also provides for delivering metrics on performance. This not only provides for a more seamless relationship between you and your suppliers, it allows for your business to react much more quickly and accurately to any change of circumstances with supply.

Purchase Contracts
Epicor Purchase Contracts is useful for purchasing inventory items on a recurring basis. You can establish delivery schedules that are regularly re-issued, against which recurring deliveries are made.

The advantage of this functionality is ease and accuracy. For example, if you need a quantity of Part ABC to be purchased monthly, you need not enter a discrete purchase order each month. Rather, you can set up a contract PO schedule and maintain this record.

Contract line items can be assigned to purchase orders. These line items automate delivery schedules, with delivery dates, prices, and corresponding quantities.

Requirements determined by Generate PO Suggestions are calculated and realized into delivery schedules. The schedules can be adjusted manually in order to conform to supplier requirements, inventory control, production efficiency, and business expediency.

Part Schedule
Use Part Schedule Maintenance to establish the combination of part, plant, and calendar that makes up the part schedule. This program is useful for assigning a period of frequency and minimum quantity for a part schedule.

Periodicity Code
Use Periodicity Code Maintenance to establish the rules and terms under which orders periodically arrive from suppliers.

Distribution Requirements Planning
Today’s businesses are looking for every opportunity to reduce inventory carrying costs while still striving to maintain high service levels—by having the right quantities where and when items are demanded by customers. Beyond streamlining business processes to drive new efficiencies, businesses are using improved analytics to provide a higher level of visibility and greater control of inventory. Through careful supply chain orchestration, best-in-class organizations are able to lower costs while optimizing inventory. Distribution Requirements Planning (DRP) capability is a key enabler of success for any business that resells items sourced through channels with long or variable lead times.

Pack Light Inventory Management for Epicor includes a suite of capabilities designed to work in tandem with your Epicor ERP data for optimum efficiency. It goes well beyond the capabilities of typical forecasting software and provides applications that assist with economic decision making, long term replenishment planning, and purchase order execution. Therefore, buyers become more productive while increasing fiscal stewardship. Additional productivity is gained through supplier performance tracking and alerts that allow for management by exception.

Demand Manager
Demand Manager delivers the tools you need to make better stocking decisions. Integrated demand forecasting and inventory planning software helps you effectively manage
on-hand inventory levels with advanced statistical forecasting that provides the ability to collaborate, consolidate, aggregate forecasts, and adjust according to planned events. Demand Manager leads to less inventory on the shelf, higher fill rates, and better customer service. It is visually based and easy to use so you don’t waste time searching through tables.

Requirements Planner
Requirements Planner is an active Purchase Order planner that suggests replenishment quantities by product at the warehouse level. It provides inventory requirements planning beyond 12 months in advance that accounts for carrying costs, freight incentives, order discounts, and required ordering quantities when planning and executing transfer or purchase orders and can be further optimized for days’ coverage, shipping container size and more.

Supply Base Manager
Supply Base Manager monitors supplier’s lead-time and delivery performance. A supplier’s performance history can be viewed and exported by detailed receipt and graph (PARETO) by: item, stocking location and in summary. “Planned” and “Expected” lead times are calculated by item and supplier for planning purchase orders. Furthermore, supply assurance can be increased by incorporating “safety time” into purchasing lead times and safety stock. Additional supplier performance monitoring serves as a tactical tool for ensuring that the business’ supply needs are met through the tracking and reporting of supplier delivery performance. The Supply Base Manager automatically buffers lead times used for replenishment planning.

Economic Order Manager
Economic Order Manager is a decision support tool for management and purchasing agents that performs inventory simulation, including ABC analysis, customer service level assignments and performance monitoring. Automated economic order management capabilities provide computational efficiency while allowing the user to adjust the variables that determine business-appropriate inventory levels and service levels.

Exception Signals
Exception Signals offers customizable alerts when statistically significant variations from the plan occur, helping you manage by exception. Exception Signals monitors exceptions and captures messages from each of the modules and presents them to buyers and planners in a prioritized order. Customizable alerts allow the user to be proactive in avoiding potential service failures by identifying when sales, supplier delivery performance, forecasts, or lead times deviate from plan.

Supplier Relationship Management
Supplier Relationship Management (SRM) provides tools for buyers, procurement staff and purchasing agents, or those providing quotes, to request quotes for raw materials or subcontract services from one or multiple suppliers. RFQs are generated with one or more lines, each line having the ability to request pricing from one or more suppliers.

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

Buyer’s Workbench
Manage all associated purchasing transactions including request for quote, order expediting, purchase order management, and supplier account management, as well as drill down to all associated information.

Part Price-Break Tables
Supplier RFQ responses automatically build part price-break tables for use with other applications.

RFQ Decision Wizard
Filter and sort RFQ criteria based on your specific needs to find the best match for the needed materials. Sort criteria include lead-time, price, quality rating, ISO certification, and on-hand inventory.
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. These allocations are relieved as inventory items are issued to the job, or as purchase order receipts are posted.

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.

Alternate Parts

Setup in part maintenance as alternate parts you have the ability to define these alternates as either complimentary or as substitutes and these are made available in the various order entry processes. Complimentary indicates other items that “go with” the part being ordered as a suggestion of other items they might consider. With substitutes (where you don’t have stock of the requested part) there are three types; Comparable, Downgrade or Upgrade and as the naming indicates these are alternatives which may be similar or slightly less or more appropriate.

Costing

Maintain FIFO, Average, Lot, Last, and Standard costs for each individual part master. The application retains transactional cost and quantity granularity; therefore the oldest cost can be determined for the cost of sales.

Cost Tracking

Separately track material cost, material burden, subcontracting, labor, and burden costing.

Country of Origin

Country of Origin offers the ability to track the country of origin at a part level, to define and then report on the composition, by percent, the specific countries of origin for that part. Composition is made available to EDI, manifest, packing slips, and label print.

Cycle Counting and Physical Inventory

Management and control of inventory is critical. Furthermore, in some regions such as Europe, the control and counting of inventory on a regular and scheduled basis helps significantly reduce annual audit costs. The cycle counting module contains the breadth of functionality and features needed for users to provide:

- Detailed audit control over the selection of items to be counted
- The frequency over the number of times these items are counted
- The tracking, recording, and review of variances for the items counted

The system will allow for the definition of the number of cycles required, counting of zero quantity on-hand, etc., and the assignment/designation of the items with an appropriate ABC code. In addition, Physical Count processes allows control over Slow Moving, Obsolete and Excess Inventory.
Global Trade Standards
For companies that are required to work within global trade frameworks, Epicor SCM ensures that you can meet the many international standards. At a part level the user can define the global trade standards for the part (UPC UCC-12, EAN UCC-13, EAN UCC-8, GTIN-14 etc). When codes are assigned to a part, a global trade standard bar code can be scanned at any part number field which automatically relates the transaction to the correct inventory part.

Lot Tracking and Lot Attributes
Provides visibility of parts by lot throughout the system. Record material received by lot, keep traceable material on-hand by lot, and maintain detailed usage information by lot at every level of the process. In support of more detailed and complete lot tracking needs Epicor has provided the ability to allow additional lot attributes to be stored for each part lot and the option to allow the system to generate lot numbers based on part specific rules. Examples of the additional Lot attributes include; Batch, Manufacture Lot, Heat Number, Manufacture Date, Expiration Date, Firmware Version, Cure Date, Best Before Date, etc.

Manufacturers Part Cross Reference
Epicor can hold cross references for a manufacturer’s part, so that receiving/inspection can confirm that the part they received is one of the correctly identified parts for the qualified part manufacturer.

Online Part Tracker
View parts, purchase orders, sales orders, quotes, and jobs to analyze current requirements and track pending receipts.

Part Cross Referencing
This functionality allows the user to create any number of cross-reference codes to a single inventory part. These cross-reference codes could be a Customer’s Part Number, Supplier’s Part Number, or just a simple internal shortcut. When the cross-reference is for a serial tracked part, then for each cross-reference created, a serial number format can be defined which will then be used when serial numbers are created using the cross-reference item number.

Part Master Price Breaks
Set up price breaks, including effectivity date, per inventory part/supplier.

Physical and Perpetual Inventory
Enter physical counts, print gain/loss reports and update on-hand inventory levels.

RoHS
Restrictions on use of certain Hazardous Substances (RoHS) EU directive instructs companies that sell electronic equipment in the European Union to reduce (under published threshold values) 6 Hazardous Substances from certain types of electronic equipment. The main aim of the RoHS directive is to prevent hazardous materials entering waste landfill sites. Other legislative bodies in other regions outside the EU have similar restrictions or are planning to implement a similar system including China, Japan, and California. Epicor delivers the ability for parts to have a compliance status in accordance with various legislative requirements and to track the consumption and disposal of those targeted parts.

Serial Tracking
Serial Tracking ensures product traceability, allowing for greater control over how the user wishes to control serial tracked parts within the facility. These options range from no serial tracking...
through to full serial traceability when each move of a part is recorded, and a record is maintained of the lower level serial tracked components that were used in the manufacture of part. A further option with serial tracking is the ability to record serial numbers at the outbound stage only. This option is aimed specifically valuable for supply chain users that need to record what serial numbers have been shipped to which customers and when, but they do not want the overhead of having to record the serial numbers as the inventory moves around the warehouse or between the manufacturing plant and distribution warehouse where the products are produced in-house.

### 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.

### Serial Documentation

Print serial numbers on all outgoing communication with the customer such as the packing slip and invoice.

### Serial Number Tracker

Serial Number Tracker provides an online view into the movement of the product after the serial number was assigned.

### Serial Number Assignment to Parts

Assign serial numbers to finished parts and raw materials processed throughout the system.

### Serial Number Formatting

Format serial numbers as either numeric or alphanumeric and assign the number of characters for the field as well as a prefix.

### Voided Serial

Allows for the voiding of serial numbers to ensure they are no longer available in the assignment/selection browser.

### Time-Phased Material Inquiry/Report

Provide analysis within a user-defined time period on those parts where projected requirements exceed available quantities.

### Unit of Measure

Base level UOM definitions with UOM Classes and conversions are just a few of the features found in Epicor as well as the ability to allow the user to select the unit of measure in which they wish to hold their inventory. When a part is defined to be tracked in multiple UOMs, then the user will have visibility of how many items they have in the different units of measure. A distributor can stock items, for example, as each, in boxes of 10, in cases of 20 or in pallets of 40 boxes. A user will be able to see exactly how many of each UOM they have inventory and where they are located. This feature is also invaluable to businesses that use raw materials that they purchase in different sizes (i.e., 6x3 sheets or 8x4 sheets, etc.).
linked job to make certain that you ensure your highest priority customers the greatest care.

Reserving Inventory
Reserve specific parts in inventory for designated orders.

Sales Order Allocation
Manage sales order allocations with greater efficiency and create more effective picking and shipping.

Scanning
Eliminate data entry mistakes and increase transaction speed by simply scanning a bar code tag to complete an entire transaction.

Shipping and Receiving
Shipping and Receiving provides a central application within Epicor to monitor incoming and outgoing items, whether they are shipments against an order, subcontract parts being sent to a supplier, raw material being received from a purchase order to a job or into inventory, or filling an order from stock. All activity relating to shipments and receipts can be performed and tracked. Online transaction processing promotes efficiency and ease of use, while online editing promotes accuracy. With Shipping/Receiving, a consistent interface processes all shipments and receipts in an efficient, accurate and cost-effective manner.

Auto-Invoice
Optionally create an invoice in Accounts Receivable following shipment to a customer.

Bill of Lading
Print customizable bill of lading forms for your shipments.

Container Tracking
Container Tracking provides the ability to track container shipments as well as update the status and due dates of all purchase orders along the way.

Customer Shipment Tracker
Track shipments that have been sent to customers.

Landed Cost
Allows businesses to track those costs accurately against the parts to which they apply, ensuring that the selling or assembly price then reflects the true cost of the materials, parts or finished goods. The cost of freight, insurance and import duties can have a big impact on margins, so landed cost processing offers significant benefits for those customers who import materials on a regular basis.

Manifesting and Freight Management
Provides the freight cost calculations and compliant package labeling for the majority of commercial carriers such as UPS®, FedEx®, DHL, USPS® as well as Less-Than-Truckload (LTL) and ad hoc carriers.

Mass Ship
Optionally mass release shipping lines from orders with same ship-to addresses.
Subcontract Parts
Track shipments and receipts of subcontract items online.

Receipt Tracker
Track receipts for goods that you have received.

Miscellaneous Shipment Tracker
View information about miscellaneous shipments.

Miscellaneous Receipts
Enter online any miscellaneous receipts to a job or into inventory.

Pack and Ship/Pack Out Processing
The Pack Out functionality adds greater flexibility and control to the shipping process by allowing carton level packing and grouping. Carton specific details such as carton weight and exact carton contents are captured with interfaces to allow manifesting (UPS, FedEx, etc.). The Pack Out screen allows for more of a “grocery store” packing system which requires very little mouse usage for distribution customers who require a very fast and accurate system of tracking carton contents.

Pack IDs
Pack IDs could be a single package, carton, or the contents for an order. Pack IDs could also be pack records for the contents of multiple orders. Allows the printing of pack records to fill orders to customers or ship parts to subcontractors with general or detailed line comments. And Master Packs can hold more than one Pack ID.

Master Pack
Master pack gives you the ability to track the precise contents of each individual pack ID. It provides the option of one carrier label for the entire master pack or a carrier label for each pack ID. This is useful for when users want to assign a Master Pack ID to a pallet of packages, so they can better track those individual packages on a single pallet that is going to the same customer or same ship-to address. The concept of a master pack is important for international shipments as it greatly reduces the complexity in shipping product over international borders.

Phantom Pack
Phantom Pack provides the ability to ship all items on an order under a single Pack ID. You determine the number of cartons needed, manifest the cartons with the tracking numbers, size and weight and freighted costs, and then generate the required shipping labels.

Label Forms
Epicor leverages Seagull Scientific, Inc. BarTender software to enable you to create your label or form format in a WYSIWYG interface. These formats are placed in a directory that is available to Epicor. Labels and Forms consist of fixed data or database variable data and can be human readable or barcode format or both.

Auto-Print Integration
This functionality provides for automatically printing barcode labels upon the completion of defined transactions in the Business Activity Manager program.

- Label Design: Integrated label and form printing.

Shipping Labels
Optionally print customized shipping labels for each order. Labels include the customer’s name and address. They can also include the purchase order number, sales order number, and ship via, number of packages, shipping comment and weight fields.

Shipping Performance
Generate executive summary of company trends regarding delivery performance, including number of shipments made,
percentage of on-time delivery, and average daily variance between customer promise and delivery.

**Warehouse Management**

Management of the supply chain requires robust logistics capabilities as part of the overall system. Epicor’s Warehouse Management System (WMS) leverages Epicor, 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. With Epicor, your warehouse becomes a key part of the supply chain.

**Bin Tracking**

Enables the tracking of bins based on various attributes (size, location, whether the bin requires a forklifts to access, etc.).

**Bin Wizard**

Enables the quick creation of large batches of bins—all at the same time.

**Warehouse Teams**

Create teams of employees with attributes assigned to them such as warehouse, bins, bin zones and items, to enable better resource scheduling.

**Customer Managed Inventory**

Gives you visibility into inventory owned by your customer and allows you to assign that inventory to a job or sales order for that customer or that customer’s customer. In both cases the values of these inventory items never appear in your ledgers.

**Supplier Managed Inventory**

Gives you visibility into inventory owned by your supplier in your warehouse. However, the inventory does not appear in your ledger until you consume those items, either in production or by receiving them to your warehouse.

**Fulfillment Workbench**

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

**Allocation Templates**

Automates the allocation of inventory for picking, with pre-defined criteria such as bin, zone, lot, serial number.

**Wave Picking**

Provides the ability to group orders by warehouse area or zone, allowing the fulfillment worker to pick items in one fell swoop for multiple orders. This reduces the number of times a fulfillment worker must return to the same area to pick items.

![View all cross dock orders waiting to be fulfilled by incoming receipts.](image)

**Cross Dock Tracker**

Ability to view all cross dock orders waiting to be fulfilled by incoming receipts.

**Paperless Picking**

Use the handheld to automatically pick orders.

**Queue Handling**

Ability to put transactions on hold and enable cross docking of sales orders, jobs and transfers. You can also assign users or
team resource groups, assign the priority in which transactions should be executed, and assign the pack station.

Queue Manager
Ability to put transactions on hold and enable cross docking of sales orders, jobs and transfers. You can also release transactions, assign users or teams to transactions, and alter the priority of transactions.

Queue Tracker
Use the Queue Tracker to view the status of Put, Pick, and Pack transaction types, and set the data to automatically refresh. Managers can view warehouse floor activity without having to filter on the various queue transaction types, which have unique identifiers. Warehouses and Bins use attributes to identify what specific transactions need special equipment, and the Queue Tracker assigns only those resources or groups with the ability to operate the specialized machinery.

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.

Offering, comprehensive inventory visibility and control, the Epicor Handheld module allows you to track your inventory as it moves throughout your enterprise. Through the use of barcode scanning using stationary, portable, wired or wireless (radio frequency) equipment, users can quickly complete inventory transactions as they happen on the floor. Real-time data capture eliminates the need for data entry as a second step which will aide in improving inventory accuracy and speeding up the order-to-ship cycle.

Epicor Handheld transactions provide your users with event-based directing and routing of all managed tasks in real-time. Additionally, you can maintain complete transaction event history for analysis and reporting purposes.

Flexible to deploy, Epicor handheld technology uses industry standard Microsoft Terminal Services for handheld devices to enable virtually any device to be used. Just like any screen in Epicor, it is highly customizable so users can change workflow, add or remove options, and even resize a bit if their devices don’t fit the 240x320 screen size requirements.

Including support for Advanced Material Management transactions, the Epicor Handheld better manages material handling capabilities by putting the update and review functionality in the hand of the material handler or forklift operator. Coupled with Handheld transactions for real time processing, Advanced Material Management offers detailed tracking of material requirements and work in process information through mobile access to the material and picked orders queue.

Eliminating manual entry of data, Epicor supports auto print control functionality which handles the automatic printing of forms and barcode labels upon the completion of a pre-determined list of Epicor transactions. Auto print control lets you define the events that trigger the printing, rules that define the conditions, and the action to take on a form-by-form basis.

Epicor is an Honors Partner and reseller of Intermec Technologies Corporation and the Epicor handheld transactions are tested on Intermec equipment. This does not preclude you from using other vendor’s equipment. If you choose to use another hardware vendor you must adhere to the above requirements.

Epicor is a Software Partner of Seagull Scientific, Inc. and the Epicor Handheld solution is compatible with their Seagull Scientific, Inc. BarTender labeling technology.

See improved inventory accuracy with wireless device management of inventory functions such as on the fly adjustments.
About Epicor

Epicor Software Corporation drives business growth. We provide flexible, industry-specific software that is designed around the needs of our manufacturing, distribution, retail, and service industry customers. More than 40 years of experience with our customers’ unique business processes and operational requirements is built into every solution—in the cloud, hosted, or on premise. With a deep understanding of your industry, Epicor solutions spur growth while managing complexity. The result is powerful solutions that free your resources so you can grow your business. For more information, connect with Epicor or visit www.epicor.com.