Epicor Financial Services Overview
Epicor ERP eliminates complexity, making ERP easier to use, more collaborative and more responsive.
Epicor Financial Services
Software for Today’s Dynamic Business Climate

Epicor Financial Services is designed to address the various financial and governance, risk and compliance (GRC) challenges encountered in today’s ever changing, dynamic business climate.

Epicor has been providing industry-leading solutions to financial institutions around the globe for more than 40 years. Scalable and modular, with rich feature sets, Epicor Financial Services can support your company’s growth with rapid implementation and easy expansion, no matter the size or diversity of your organization. Sound enterprise financial management practices should be designed to automate and streamline your financial business processes by providing the tools needed to create value through monitoring financial conditions for timely decision making. To this end, your enterprise application system is the single, integrated repository of data which provides an accurate view of all your financial data, including a 360-degree view of your customer—from customer-specific product information to consolidated sales, invoice, and payment history.
Financial Services Expertise
Achieving financial visibility and effective controls within the enterprise can be a formidable challenge when many of the processes and procedures in place remain manual and fragmented. With the increasing nature of worldwide compliance regulations, the need for corporate financial visibility has become necessary for any size organization—public, private, and non-profit. Regulatory bodies and audit firms are all advocating the need for improved financial management and visibility. Epicor Financial Services is uniquely positioned to manage financial management and GRC requirements for the most demanding of financial institutions including:

Banking
- National, state, and commercial banks
- Federal savings institutions
- Savings institutions
- Federal credit unions
- State credit unions
- Non-deposit trust facilities
- Personal credit Institutions
- Mortgage brokers
- Security brokers and dealers
- Security and commodity exchanges

Insurance
- Life insurance companies
- Accident and health insurance companies
- Fire and casualty insurance companies
- Title insurance companies
- Pension, health, and welfare fund management

Epicor has experience working across the major financial sectors and has developed solutions to fit the unique requirements for supplying these businesses with robust financial management capabilities.
An extended financial services solution from Epicor can help integrate and manage processes across front, middle, and back office operations, by consolidating these processes into a scalable, compliant, and modern ledger environment. Some of the results of this coordinated effort that can help you achieve the maximum return on investment with the shortest payback period include:

- Improving data accuracy and consistency
- Improving cash flow performance from operations
- Improving financial transparency company-wide
- Enforcing global financial standards across the organization
- Increasing loyalty of your customers by responding faster and more effectively

Epicor Financial Services is a powerful yet easy-to-use financial solution available to organizations worldwide. It’s comprehensive and loaded with innovative tools to synchronize and consolidate financial transactions, provide financial visibility, and support corporate GRC initiatives as a means to reach new, industry-leading levels of business performance.
Epicor Financial Services Overview

**Financial Management**
- General Ledger
- Accounts Payable
- Accounts Receivable
- Credit and Collections
- Cash Management
- Expense Management

**Customer Relationship Management**
- Contact Management
- Case Management
- Marketing Management

**Global Business Management**
- Multicompany Management
- Global Multisite Management
- Multilingual Data Management
- Master Data Management
- Multicurrency Management
- Country Specific Functionality

**Human Capital Management**
- Core HR
- Payroll (US)*
- Recruitment
- Reporting & Analytics
- Talent Management
- Direct Access
- Mobile HCM

**Enterprise Performance Management**
- Planning, and Forecasting
- Operational Data Store and Data Warehousing
- Scorecards and KPIs
- Role Based Content
- Trackers and Dashboards
- Mobile Business Intelligence

**Governance, Risk, and Compliance**
- Risk Management
- Security Management
- Corporate Governance
- Global Trade Compliance
- Environmental and Energy Management

*Available in the US only - please check with your Epicor office for local solutions.*
Supply Chain Management
- Purchase Management
- Strategic Sourcing
- Stores Management
- Distribution Requirements Planning
- Shipping and Receiving
- Supplier Relationship Management
- Supplier Connect

Project Management
- Project Management
- Resource Management
- Project Billing
- Time Management
- Mobile Time
- Mobile Expense

Business Architecture
- SaaS, Hosted, and On-Premise Delivery
- Services Architecture
- Microsoft® .NET and SQL Server® Optimized
- Web Services
- Business Activity Queries
- Enterprise Search
- Business Process Management
- Information Worker
- Service Connect
- Microsoft SharePoint® Publisher
- Social Enterprise
Immediately Productive and Simply Easy to Use

The rise of consumer technologies, easy-to-use apps, and social networks has created a new imperative for business applications. Traditional ERP can be notoriously complex to implement, use, and maintain; Epicor ERP is different. We focus on continuously eliminating complexities, and providing innovative solutions that encourage the use of ERP—from intuitive navigation to configurable dashboards—to empower every user to create their own “My ERP.” We embed capabilities that make it simple for users—particularly infrequent users—to access information in real time, spurring innovation. To augment the inherent usability of Epicor ERP, we deliver embedded help, embedded training courses, and our comprehensive Epicor University curriculum.

Our focus on reducing complexity enables Epicor ERP to deliver exceptional ease of adoption. For example, we incorporate tools and workbenches to simplify implementation and streamline upgrades. These allow you to stay current and take advantage of new capabilities as quickly as they become available.

Responsive ERP That’s as Mobile as You Are

The days of coming to the office, logging into an ERP system, then leaving it all behind at the end of the day are long gone. Work has moved beyond a PC in a cubicle or office: to the customer site, on the plane, at home, or on a supplier visit. In today’s always-connected world, users demand access 24/7, with a consistent experience that flows between devices. Support for touch and gestures and the ability to fully interact with business systems—beyond simply drilling into analytics—is becoming the new normal.

End user demands for greater control over the user experience are increasing. Individuals expect to be able to manipulate screens and dashboards in a manner that is relevant to a particular role, task or point in time.

Epicor recognizes the challenges these competing demands can have, and the implications for ERP to ensure enthusiastic adoption throughout the organization. We focus on ensuring that our business architecture and business solutions enable you to stay ahead of the curve, and your users are fully productive however they choose to interact with Epicor ERP.

Collaboration Inspires Innovation

The principles of ERP are founded on the benefits of working together. Embedded within Epicor ERP, Epicor Social Enterprise (ESE) supports the fundamental shift in the way organizations collaborate, both internally and externally. Depending on circumstances, examples might include collaborating around a project, a customer incident, a quality issue, a procurement challenge, or a planning event. ESE changes your relationship with ERP, enabling everyone to securely engage within your businesses and leverage ERP to make more informed decisions and foster innovative ideas.

Freedom of Choice

As your business grows and changes, you need a solution that can grow and change with you. As a single solution able to be deployed on premise, hosted, or in the cloud, Epicor ERP provides unprecedented deployment flexibility. For example, if your business has limited IT resources you may opt to initially deploy the solution in a hosted model or in the cloud. As your business changes you may subsequently opt to redeploy Epicor ERP on premise. Epicor is one of the few vendors to have architected a full multitenant software as a service (SaaS) and on-premise version out of a single product and is the only vendor who has deployed it to customers.¹

Raising Technology to the Business Level

Epicor ERP includes industry-leading technologies at the core of its solution for worldwide organizations. Epicor is the foundation upon which businesses execute strategies and achieve objectives, operating seamlessly and effectively in the background, and enabling highly optimized business productivity.

Epicor has been a consistent leader and innovator for global enterprise resource planning (ERP) solutions built entirely on a service-oriented architecture. Using this approach, “services” are self-contained, platform independent, pieces of business logic that can be dynamically located, invoked, and used to configure and reconfigure processes, and improve integration of applications.

Quite simply, by using enterprise applications based on a SOA, organizations can easily add new functionality in a highly granular fashion, as they need it, and can easily reconfigure workflows with minimal integration costs or impact on their business operations. Organizations can purchase just what they need today with minimum risk.

Business Anywhere: Global Solutions, Local Expertise

You face intense competition—from booming multinationals to aggressive, nimble smaller companies down the street. The Epicor solutions are tailored to meet the unique needs of companies across a broad range of industries and sectors including distribution, hospitality, manufacturing, retail, and business services. We have offices around the world gathering requirements, developing applications, implementing software, and helping companies deploy best practices to compete and comply in their markets.

Epicor provides a consistent, repeatable single-solution approach that integrates your corporate ERP with your divisions and operating locations. The world-class capabilities of Epicor applications enable the local, regional, or centralized deployment of standard processes within a consistent, pervasive security framework. This ensures that operational information produced locally, from forecast to financials, cascades upwards into a single consolidated view of global activities that accurately reflects your organization’s performance.
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 premises. 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.