

Sales Management

Business without Barriers

EPICOR®

Driving revenue by reducing the barriers
between you and your customers.

Sales Management

- Estimate and Quote Management
- Order Management
- Demand Management
- Advanced EDI
- Point of Sale
- eCommerce



Epicor Sales Management

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.

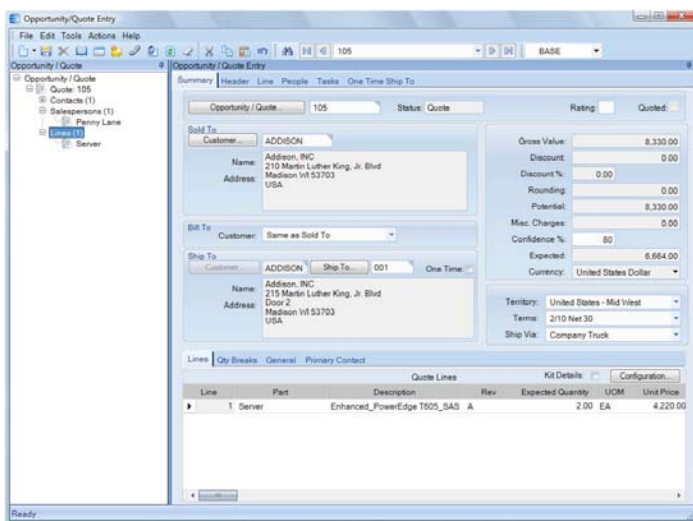
By streamlining the sales process with centralized access to product, pricing, and customer information, orders can be generated with a minimal number of steps. Epicor Sales Management automates and improves labor-intensive processes for quoting, proposal generation, configuration and order entry, enabling 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. You can get quotations out more quickly and be more accurate with pricing and lead times.

Estimating

Calculate material, subcontract, labor, and burden costs for multiple quantities of a part with information from the last time you quoted or ran the part, from a similar part, or from the Bill of Materials (BOM). Add any special charges (e.g., tooling or design). When the order arrives, punch a few keys and the detailed routing will be ready to go to the floor or to make additional changes.



Generate accurate and timely estimates and quotes, and import data from a variety of customer and system sources.

Standard Routings

Pull same-as-except type parts into a quote, then modify them quickly and easily to create a new one.

Pipeline Management

Track confidence levels (e.g., best, worst, most likely) by quote line to accurately predict pipeline activity. Management override optimizes forecast accuracy.

Drag-And-Drop Interface

Use a tree interface to drag-and-drop components, operations or materials from another quote, BOM or previous job.

Realistic Cost Estimates

Perform realistic cost estimating with minimum lot charges, price breaks, and scrap factors on materials and subcontracting.

Inventory Availability

Check inventory availability during quote entry.

Request Supplier RFQ

Create RFQ requests to trigger buyers to solicit suppliers for pricing of materials required in the quote process. Review responses once submitted for inclusion in the estimate.

Markups

Specify and store individual markups for material class, subcontracting, operations, and special costs.

Order/Job Integration

Transfer quote information to a sales order or job. Built with tremendous flexibility, there are multiple ways to process an order and job from an existing quote such as:

- Push to an order by the line item
- Flag as won, automatically generating an order
- Pull from Order Management with flexibility to define specific lines and quantities desired

Part Advisor

Drill down into the quote/job/part status and history to answer critical questions related to a part:

- Have I quoted it before?
- Are there current orders for it?
- Have I run it before?
- Am I currently running it?
- Do I have any in inventory?
- Is part profitability available?

Prospects

Send quotes to prospects, even if they don't exist in the customer file.

Quote Tracker

Instantly query summary and detailed information on an estimate/quote.

Competitive Analysis

Track all competitors to find out where you are winning and why you may be losing.

Workflow

Manage the sales cycle with dynamic task lists that ensure the right people are working on the quote at the right time.

Part Cross-Reference

Cross-reference customer part numbers to your part numbers automatically during the quoting process.

Material Calculation and Machine Time Estimation

Epicor offers real-time integration to industry-leading estimating solutions for material calculator functionality as well as machine time estimation.

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.

Blanket Orders

Establish multiple releases (either firm or not firm) for each sales order line and pull parts directly from inventory. Optionally lock the order line quantity allowing new releases to decrement the final delivery quantity on the final delivery date, keeping the total line quantity in balance with the release.

Credit Checks

Check customer credit status online at quote entry, order entry, and shipment entry.

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

Multiple Ship-to Addresses

Track multiple ship-to addresses per order release.

Alternate Bill-to and Sold-to Customers

Application for payment may be required from a different customer than the customer order/receiving the goods or bill third-parties, such as a customer of your distributor.

Ship From Multiple Locations

Ship an order from multiple plants and multiple warehouses.

One-Time Shipments

Do a one-time shipment to an address in Order Entry.

Fulfillment and Allocation Processing

Access to fulfillment and allocation processing within sales order processing. 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.

Fulfillment Queue Management

Manage your work queues and assign tasks that are created by, but not limited to, the fulfillment-allocation process. Choose whether the shop floor operates based on paper, or becomes a paperless operation with automatic user-assignments driven by the Material Queue.

Put Transaction Type

This transaction type is for all directed put-away transactions, including purchase order receipts, transfer receipts, RMA receipts and job receipts.

Pick Transaction Type

This transaction type is for all directed pick transactions. This includes sales order picks, issues to jobs, transfer picks, cross docking, and any bin-to-bin movements.

Pack Transaction Type

This transaction type tracks work station loads. During the pick process, the application calculates which suggested work station should pack the order based on load.

Fulfillment Queue Tracker

Use the Queue Tracker to view the status of put, pick, and pack transaction types. Managers can view all shop floor activity or filter on the various queue transaction types, each of 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. Managers also create resources and groups and assign them transaction types and the priorities in which the transactions should be executed.

Drop Ship and Buy to Order

Provide the ability from within a sales order to define a part as being "Buy-to-Order." This may or may not be defined as a drop ship item. In both cases, the purchase order will be linked to the sales order directly.

Cross-Docking

In conjunction with the fulfillment process, cross-docking provides the ability to directly link future inbound supply of items from purchase orders or jobs directly to demand from sales orders, transfer orders, or jobs. When the cross-docked items are received, they are immediately directed to the demand they are linked to, minimizing the time and task to fulfill the order or job.

Sales Kits

Flexibility in selling items in kits includes configured item kits, optional price rollup and item substitution, mandatory ship complete, and optional printing of kit components on the packing slip and invoice.

Configure Sales Kit Components

Use the answers from the kit master to "on the fly" configure individual kit components, automating kit instructions for features like style, color, and size.

Configure a Kit within a Kit

Create a kit within a kit. Configure multilevel configured sales kits that include non-stock components generated on a job or purchased direct for the kit, alongside stocked components.

Backorders

Automatically create backorders for lines shipped incomplete. Flexibility enables customer-specific backorder parameters for complete order lines or complete orders to be set.

Sales Commission

Manage sales commission calculations for direct and indirect sales teams. Allocate commission percentage over multiple sales entities per order line.

Price Lists

Generate customer, product group, warehouse, and product-specific pricing hierarchies, while matching the end-user currency. For global enterprises, company, plant, and warehouse pricing offers flexibility in pricing products.

Up-Sell, Cross-Sell, and Down-Sell

Improve order accuracy and ability to enhance sales with Up-sell, Cross-Sell, and Down-sell capabilities. At time of sales order entry, users are prompted with suggestions for "Upgrades," "Downgrades," "Substitutes," and "Complements." Whether substituting the original part with an upgrade or downgrade or adding complementary products; improved customer satisfaction alongside enhanced sales is the return.

Order-Based Discounts

Apply order-based discounts on an order value or product quantity basis. Optionally override and lock pricing.

Miscellaneous Charges

Enter unlimited miscellaneous charges or credits on each order header or order line. These charges will then print on the order and carry over to invoicing.

Order Tracker

Use order tracker to see a summarized view of the order, then drill down on selected items to see greater details (e.g., lines, releases, shipments, charges, bookings, audit, and payment information). Use real-time data to link to other parts of the system.

Copy Order and Build Order

Simplify repeat orders with the Copy Order function. Optionally build order from history. See previous orders and enter the quantity on the order form.

Capable-To-Promise

Provide accurate, real-time delivery dates to customers when using Advanced Planning and Scheduling (APS). Furnish a realistic promise date to your customer by finding out how a quote would fit into your current schedule.

Multilevel Capable-To-Promise

For multilevel structured products, Capable-To-Promise can be configured to create the sublevel assembly structures in addition to the top level assembly.

Available-To-Promise

View running balances during order entry. Enter a quantity, and the system will find the earliest date that quantity will be available. Enter a date, and see how many parts are available on that day.

Order Job Wizard

Generate appropriate jobs for new orders in a single step that enables the user to create, plan, schedule, and release jobs against multiple lines and multiple releases.

Project Management

Link sales orders, jobs, purchase orders, field service calls, cases, tasks, milestones, and budget information to manage projects.

Counter Sales

Automate the pick-up, shipment, and generation of sales invoices for walk-in customers.

Tax Calculations

Tax calculations and fields are available at the sales order, line, and release levels.

Credit Card Processing

Epicor Credit Card Processing includes easy to use maintenance for initial setup along with a variety of integration points to bring an easily deployable solution to your business that meets the security guidelines as specified in the Payment Card Industry Data Security Standard including securely encrypted account numbers and key management. Epicor Sales Management uses Epicor Credit Card Processing to support authorization with the sales order, reauthorization with the sales order before picking and shipping, and complete or partial funds collected with the sales order.

Customer Portal Content Pack

Epicor Portal Customer Content Pack provides interactive customer facing content that supports strategic goals for improved customer communication and direct collaboration on day-to-day business, right from your intranet and extranet. Additionally, customers enjoy 24x7 self-service and can access, review, and make online requests for quotations. Epicor Portal Customer Content Pack is designed to deliver all the information your customers are looking for; open and closed orders, shipments, returned material authorizations (RMAs), invoices and credit memos along with payment history and service calls.

Demand Management

In today's climate of shorter lead times, more frequent orders of smaller quantities, and where meeting customer demand secures your competitive edge, companies must find ways to anticipate changes in customer demand. Epicor Demand Management responds to these business conditions and incorporates the requirements of Electronic Data Interchange (EDI) to help your company reduce lead time in the office for planning and procurement, thus enabling you to respond on the production floor faster.

Demand Management offers the establishment of contracts that can be linked to sales orders and releases. These contracts can be managed, and schedules produced, automatically with set periodicities that match each customer's unique shipping needs. Additionally, as change happens, the schedules can be regenerated. If EDI is deployed, your customers' electronic demand changes are brought in for review and acceptance. This is important for companies doing business in industries such as industrial machinery, automotive, aerospace and defense, consumer products, and retail. Accountability of change and rapid flow of information to the production floor, as a result of fully integrating EDI with your Epicor system, can elevate your supplier status.

In addition, Demand Management not only looks at the demand side of EDI, but also focuses on the fulfillment side with secure outbound Advanced Ship Notice (ASN) transactions that the customer reconciles with each shipment. Through an inbound EDI document, the CUM (Cumulative) total value and actual received quantity is then electronically sent back to you for reconciliation and potential adjustment.

Sales Contracts

Contract structure that provides the ability to have many sales orders/lines attached to the contract.

Review incoming demand schedules generated manually or through Electronic Data Interchange (EDI).

Schedules

Manually generate release schedules based on defaulted customer periodicity and release quantity. Automatically close rejected schedules from the customer record.

Schedule Review

Review balances as well as proposed quantity of proposed schedule.

CUMs

Manage and reconcile the cumulative shipping quantity. Validate CUM discrepancies by customer and choose to "Stop" or "Warning," allowing the received demand to be turned into a valid sales order-- this feature includes Cumulative Variances Reporting. The Demand Reconciliation screen helps in the cumulative matching process with the ability to easily make reconciled quantity adjustments. Cumulatives are tracked at the order and shipment levels over the life of the contract.

Forecast

Schedule forecasted deliveries that can be utilized in conjunction with MRP to predict demand for resources and provide guidance on pending demand for materials.

Periodicity

Specify rules by plant or plant/supplier for automatic purchase schedule suggestions. Periodicity rules can be specified as Daily, Monthly Forward, Weekly Forward, and Nth Day of Week.

Capable-to-Promise Automated Rejection

System reviews open contracts and capacity requirements for a product and can automatically reject or accept the new demand requirements after reviewing against open contracts as well as available capacity. Alternate definitions for rejection rules enables additional flexibility.

Support for Allowance and Charge Codes

Optionally transmit allowances and miscellaneous charges within EDI transmissions to trading partners. Both flat amounts and percentage based charges are available.

Automated Order Match Validation

Automatically cancel demand releases received that are not matched to a specific order release.

Close and Process Schedules

Use a single step to automatically close and process all schedules within Demand Management.

Contract Start and End

Manage contracts effectively with contract start and end date.

Mass Review

Review the demand in mass and make modifications prior to generation of forecasts or sales orders. Choose by part or demand for acceptance/rejection of schedules, including Mass Review and Net Change Reporting.

Configuration Details

Automatically receive and pass configuration details for configurable parts from automated EDI transactions through Demand Management to order processing.

Automated Order and Forecast Acceptance

Specify customers who can bypass manual review of incoming EDI documents in favor of automated receipt of un-firm or firm orders and changes based on predefined customer attributes.

Advanced EDI

Electronic Data Interchange (EDI) is the traditional form of exchanging information electronically and is utilized by many suppliers to manage their supply chains more efficiently. Epicor EDI, used with Demand Management, provides a common interface for managing and exchanging large volumes of data. Demand Management handles creation, analysis, scheduling, and reconciliation of cumulative releases from your customers. You can use Demand Management without EDI and vice versa.

Epicor EDI functions are tightly integrated with the Demand Management module and facilitate electronic communication of release and ASN information to and from your customers. EDI offers direct integration with your Epicor data, reducing the turnaround time on schedule changes and additions, and eliminating potential data entry errors. Epicor Professional Services are experienced in making EDI work in various environments with various EDI suppliers, and can offer enhanced functionality that is tailored to the EDI needs of your business.

Acceptance Status

Automatically track functional acceptance status of EDI documents, including acceptance, rejection, and partial acceptance of outbound documents through receipt of functional acknowledgements from trading partners.

Pay on Receipt (POR)

Automatically provide data elements required from trading partners for "Pay on Receipt" - improving cash position for your business.

EDI Transactions

EDI Supports ANSI X12 and EDIFACT documents and is flexible enough to support most EDI document requirements including but not limited to:

Inbound Documents

- Purchase Order (ORDERS, 850)
- Planning Schedule (DELFOR, 830)
- Shipping Schedule (DELJIT, 862)
- Change Order (ORDCHG, 860)
- Request for Quotation (REQOTE, 840)

Outbound Documents

- Purchase Order Acknowledgement (ORDRSP, 855)
- Advanced Ship Notice (DESADV, 856)
- Invoice (INVOIC, 810)
- Response to Request for Quotation (843)
- Purchase Order Change Acknowledgement (865)
- Order Status Response (OSTRPT, 870)

Additional documents may be available or developed by Epicor Professional Services.

Web Services for Easy Collaboration

Epicor Service Connect consists of security, messaging, workflow orchestration, transformation, scheduling, notification, exception handling, and Web Service components. It can be used to setup secure EDI orchestrations between Epicor and external trading partners. A runtime version of Service Connect is included with Epicor, or you can purchase full-use Service Connect for more control.

TIE Commerce® Software

Epicor has partnered with TIE Commerce to ensure close collaboration during implementation of EDI solutions. TIE's Business Integration products support all industry B2B e-commerce standards, and communication and security infrastructures.

Point of Sale

Staying ahead of the ever increasing expectations of customers and employees in today's fast-paced retail environment can be your most effective competitive advantage. Epicor Point of Sale (POS) is designed to empower your organization with the ability to exceed these expectations, extending the power of your Epicor ERP solution to a customer-facing sales environment. Epicor provides POS solutions to organizations with a single POS station to large, multinational chains with hundreds of stores.

Epicor POS is a feature-rich store system that empowers store personnel to provide enhanced customer experience. Comprehensive functionality include 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's eCommerce solution, Epicor Commerce, enables you to increase your Web presence and help drive new business—both from your existing customers and from new, untapped business opportunities and sales channels. With Epicor Commerce, your company can easily deliver an intuitive, personalized shopping experience over the web. While many companies can provide eCommerce services, very few are able to deliver the value and results that Epicor can.

Today's hyper-competitive business environments require eCommerce solutions to do much more than simply process shopping transactions quickly and efficiently. With Epicor you can manage customers, merchandise, inventory, order history—basically the entire order life cycle. An extension of your Epicor solution, Epicor Commerce enables you to effectively manage the entire customer experience.

You no longer need to have two separate systems to accept wholesale and consumer orders. With the Epicor Commerce solution, you have one system to manage. Epicor Commerce eliminates the redundant databases found in most eCommerce scenarios. Product information has tiered pricing and customers and inventory levels are available directly from your Epicor inventory. Orders can be submitted and processed immediately allowing the customer to use their terms or credit card for purchase.

Epicor Commerce also provides deep integration with your order fulfillment process and makes it available to your customers online. At the time of requesting a quote or placing an order, customers will be able to select the available shipping methods and determine their freight cost. Once the orders are placed, online tracking allows them to see when their product was shipped and lets them track the shipment through the carrier.

On Premise or Hosted, the Choice is Yours

Epicor Commerce has a variety of deployment options that are sure to fit your specific needs. Epicor Commerce can be deployed as a hosted product that virtually eliminates the need for your organization to provide any valuable IT resources to running or maintaining your eCommerce website. Epicor Commerce was developed with flexibility of deployment in mind so that it can be hosted in the location of your choice. In addition to direct hosting services, Epicor has a SaaS offering for Epicor Commerce.

Epicor Commerce also provides on-premise deployment options which could provide greater flexibility in accessing the secured functionality from other computers and in managing updates to the Epicor Commerce application.

Epicor Commerce Management Console

The Epicor Commerce solution provides a comprehensive framework and toolset designed to easily and efficiently manage the day-to-day operations of running an eCommerce website. Epicor Commerce Management Console enables the administrator of the site to control users, products, orders, content, and documents. The administrator can also easily build out additional pages within the websites. The toolset is designed so that changes to content and the website can be made without the help of a programmer or a graphic designer. The Management Console provides a simple interface from which to manage all corporate websites. Once the data from the back-end system is updated, your company's products, customers and pricing are available on the Management Console. Administrators can then add additional marketing data as needed.

Unlimited Products & Categories

Catalog a virtually unlimited number of products. Shoppers can browse product pages or use the advanced search utility to find specific items.

Built-in Visibility

Products, customers, items and pricing are pulled from Epicor and orders are submitted immediately.

Product, Customer and Price Synchronization

Easy information exchange! Add products to a Web store or complete batch updates by connecting to your production database or ERP system.

Estimated or Actual Freight Rating

Freight charges can be applied as a flat rate, percentage of order total or actual shipping charges from UPS®, DHL®, or Federal Express®.

Suggested Selling and Related Items

The easiest time to add on a sale is when a customer is buying. With suggested selling you can link add-on products to customers' choices several times during the buying process.

Promotions & Coupons

Now it's easy to use coupon codes as sales incentives. Specify when and how the coupon will expire and what items the coupon can be applied to.

Multiple Payment Options

Accept electronic checks, purchase orders, COD, credit card, terms.

Search Engine Friendly

All pages are built with the top search engines in mind. Page titles and metatags can be added to each page.

Merchant Account/Gateway Integration

Paypal™ Payflow Pro processing integrates with most banks.

Advanced Automated Tax Calculations

Integration with the industry leading on-demand retail tax service.

Sales Kits

Flexibility in selling items in kits includes configured item kits, optional price rollup and item substitution.

Customer-Specific Pricing

Published interfaces for modules such as shipping, tax, inventory, order tracking, etc. allow for full customization of the Epicor application.

SKU and Item Management

Ability to add SKUs manually or pull items and descriptions from Epicor backOffice.

Advanced E-commerce Website Design

Incorporation of sophisticated website design requirements into the storefront design (Flash, Flex, interactive media, product ratings, advanced filtering capabilities, etc.).

Combined B2B and B2C eCommerce Site Design

Have one website support both your sales to your customers while at the same time have a secure login for your trading partners giving access to products, parts, and specific vendor pricing.

Affiliate Marketing

Management of affiliate marketing programs—per click, per sale, or per lead.

Gift Card Promotions and Management

Management of gift card point or reward systems and the related customer usage of the respective gift cards.

Advanced Search and Filtering Capabilities

Sophisticated part/product search capabilities for customers and trading partners.

Advanced Reporting and Analysis

Integration to industry leading reporting and analytics tools designed for website analysis.



Manage all of your corporate eCommerce requirements through the Epicor Commerce Management Console.

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.

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