Epicor Process Review (EPR)

SALES	INVENTORY / SUPPLY CHAIN	MANUFACTURING		FINANCE		
Contracts / Projects	Advanced Estimating and Planning	Configurator	Maintenance	Accounts Receivable	Commerce Connect	General Ledger
Demand Management	Inventory	Engineering	Manufacturing	Accounts Payable	Credit Card Processing	Multi-Company
Post-Sales	Planning	Field Service	Quality Assurance	Asset Management	Currency	Payroll
Pre-Sales	Purchasing			Cost Accounting	Expense Management	Rebates
	Shipping and Receiving					

Pre-Sales

FUNCTION MENU

PRE-SALES MENU

Marketing Campaign to Lead Generation

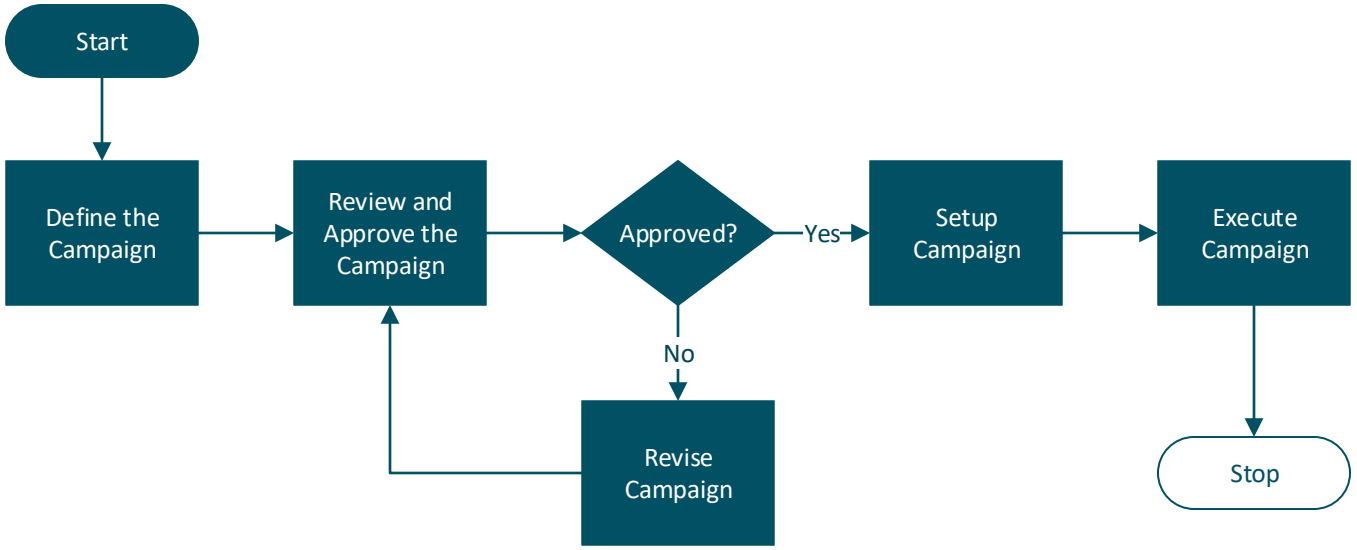
Customer Quotes

Customer Inquiry

Lead Qualification to Prospect

Maintain Task List

PROCESS: Marketing Campaign to Lead Generation

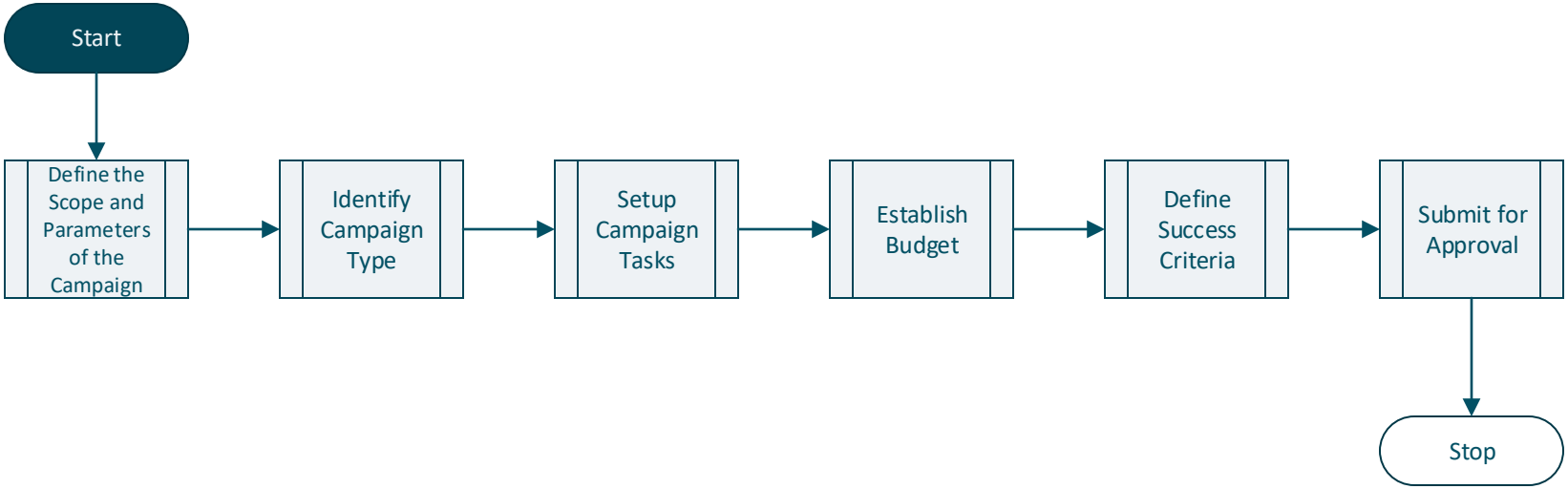


Role Assignment:
- Marketing

Notes: Execute Campaign should include links to Create Opportunity and Create Sales Orders

License Requirements:

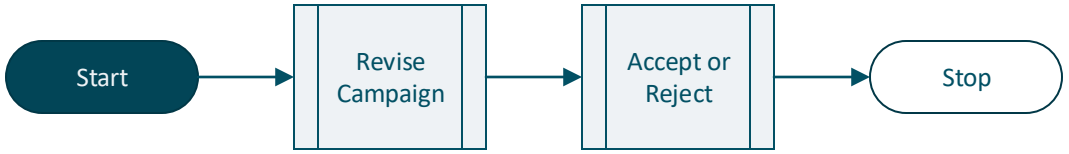
STAGE: Define the Campaign



Role Assignment:
- Marketing

License Requirements:

STAGE: Review and Approve the Campaign

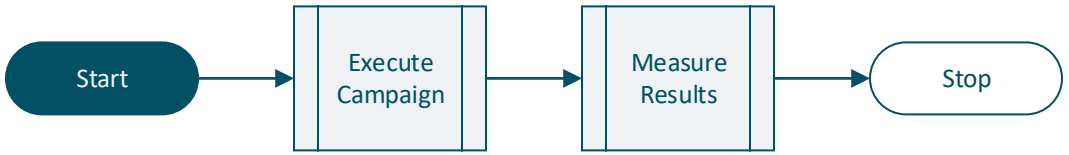


Role Assignment:
-Marketing
License Requirements:

Role Assignment:
- Marketing

License Requirements:

STAGE: Execute Campaign



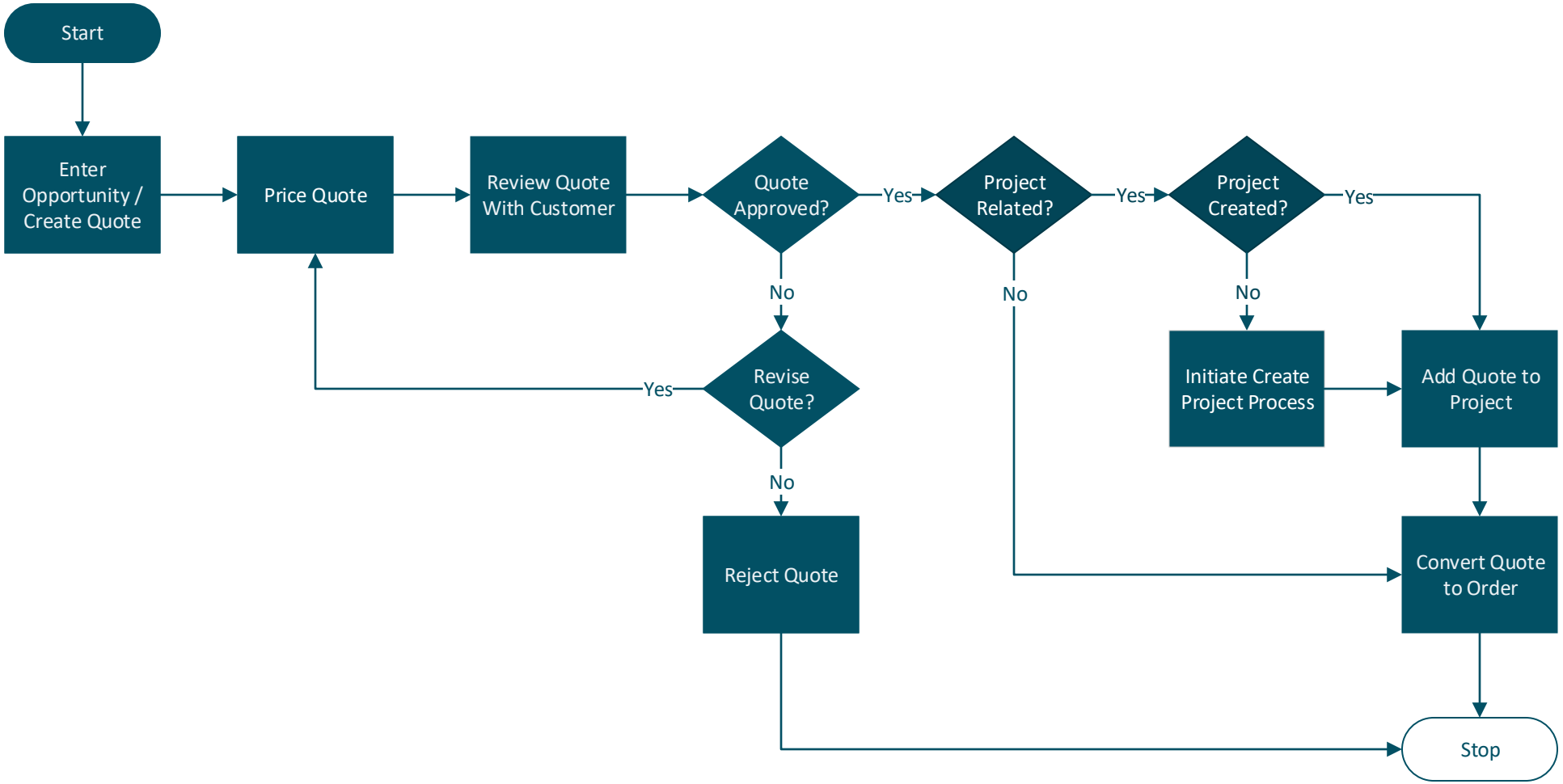
Role Assignment:
- Marketing

License Requirements:

Stage: Revise Campaign

Role Assignment:
- Marketing

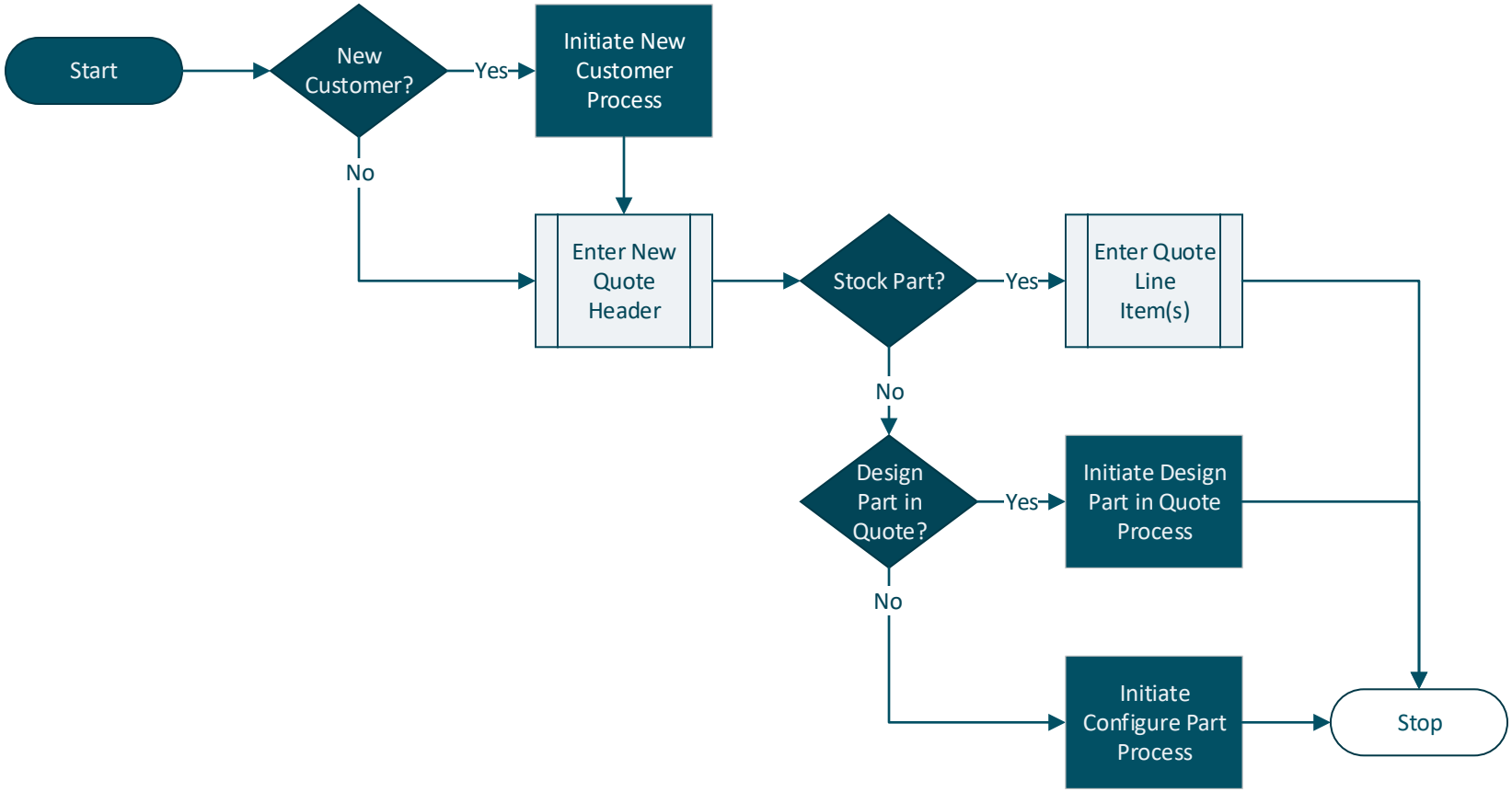
License Requirements:



Role Assignment:
- Project Manager/Contracts

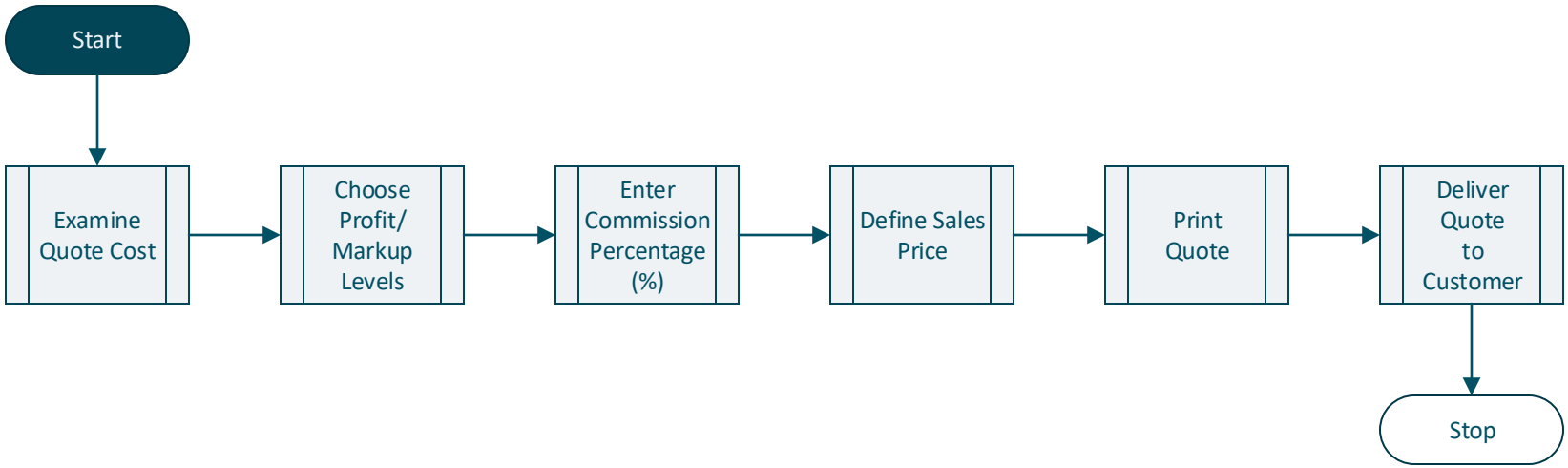
License Requirements:

STAGE: Enter Opportunity



Role Assignment:
- Sales

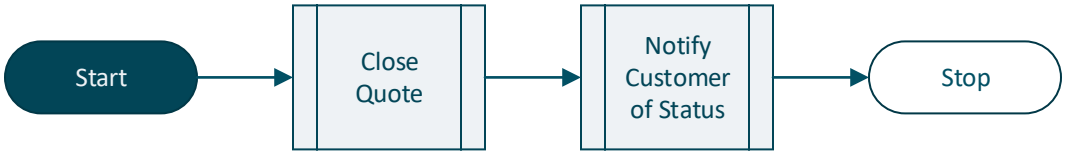
License Requirements:



Role Assignment:
- Sales

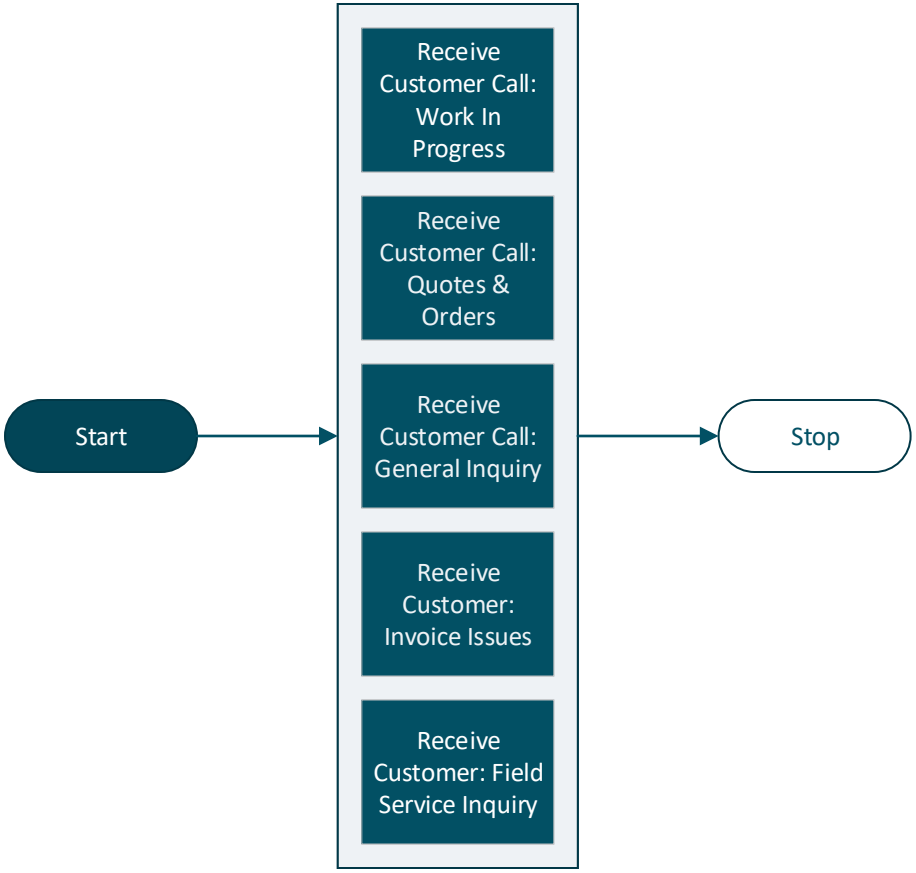
License Requirement:

STAGE: Reject Quote



Role Assignment:
-Sales
License Requirement:

Process: Customer Inquiry

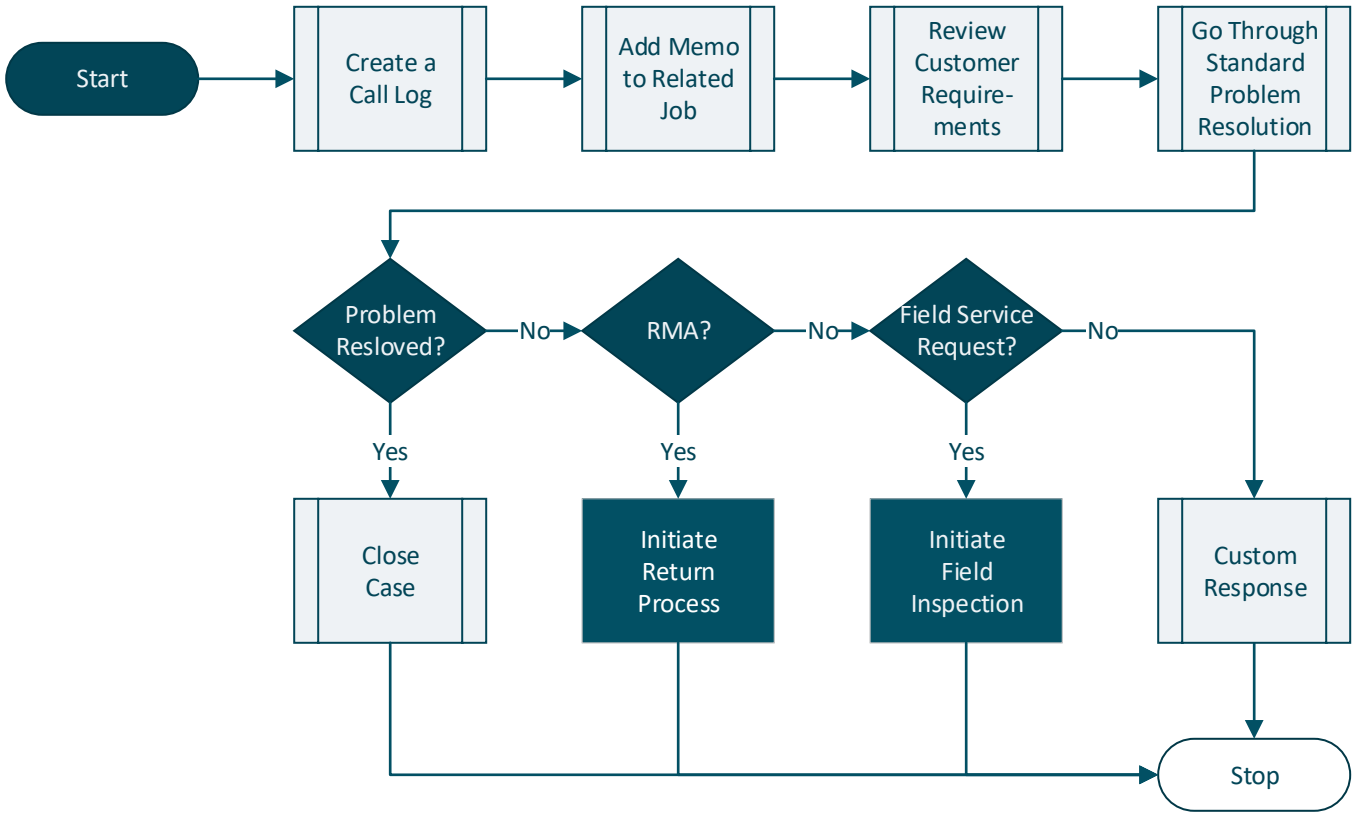


Role Assignments:
- Field Service Technician \Sales

Notes: A request from Customer can go to any Role within Epicor. That individual can then initiate all Stages by creating a Case.Then following Case Workflow, depending on the Call type, they may route the resolution to different department(s).

License Requirements: Project Manager/Contracts

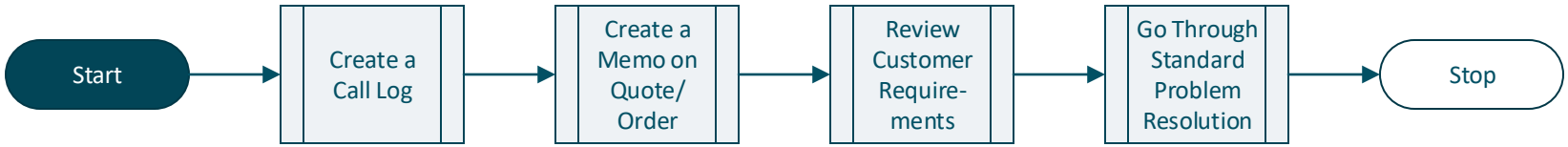
STAGE: Customer Call Regarding Work in Progress



Role Assignments:
- Planner / Scheduler

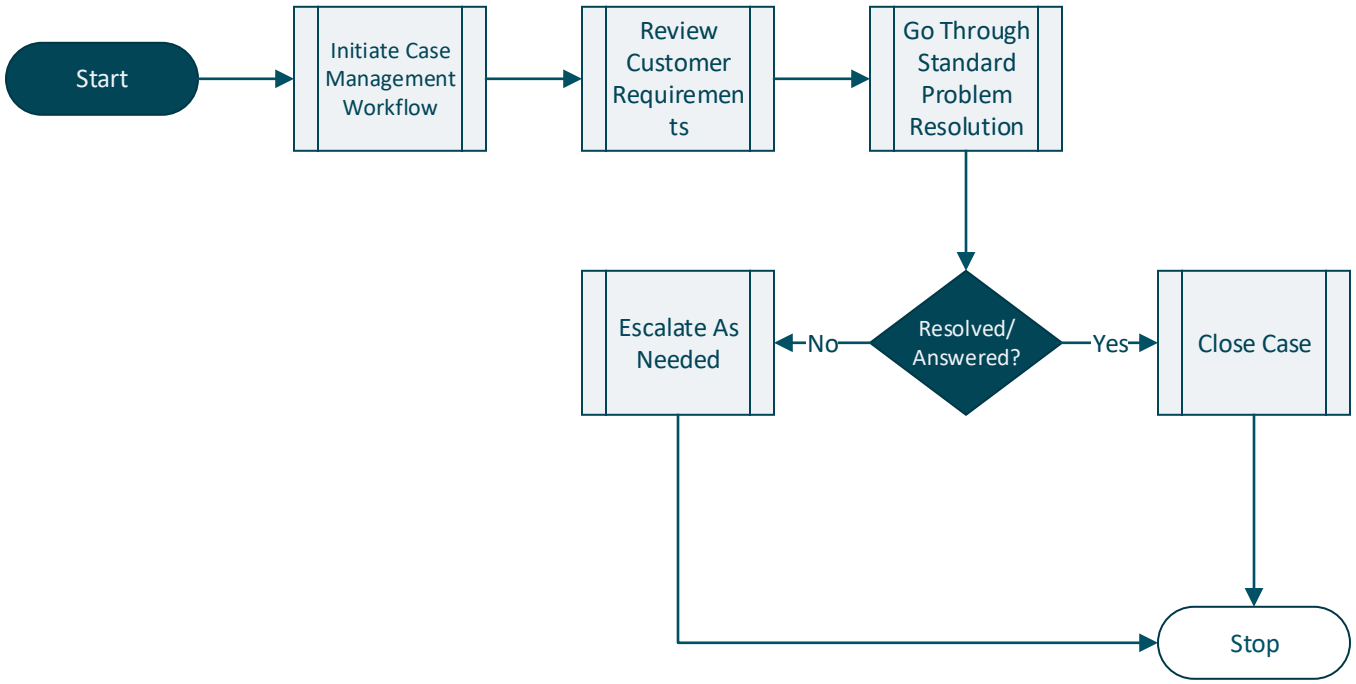
License Requirements: Project Manager / Contracts
- Sales

STAGE: Customer Calls regarding Quotes and Orders



Role Assignment:
- Sales

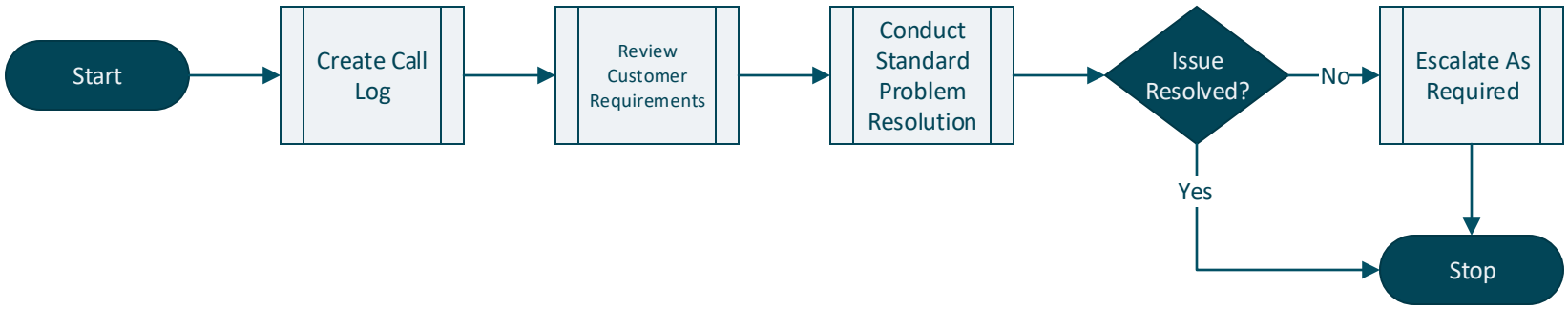
License Requirements:



Role Assignment:
- Sales

License Requirements:

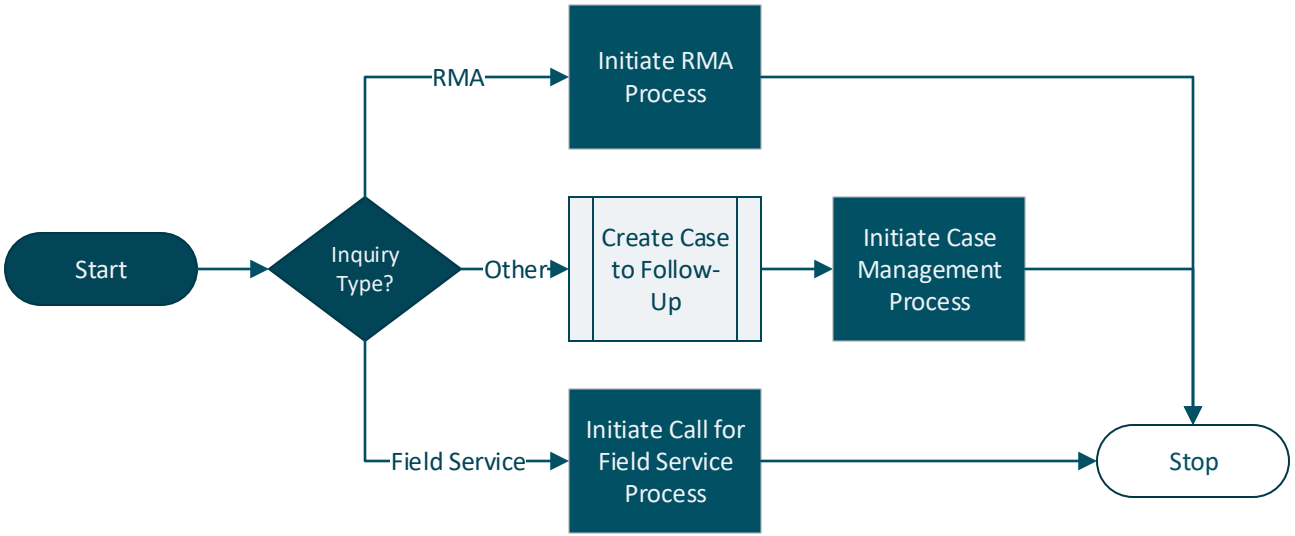
STAGE: Invoice Issues Call



Role Assignments:
- AR Entry \ Sales

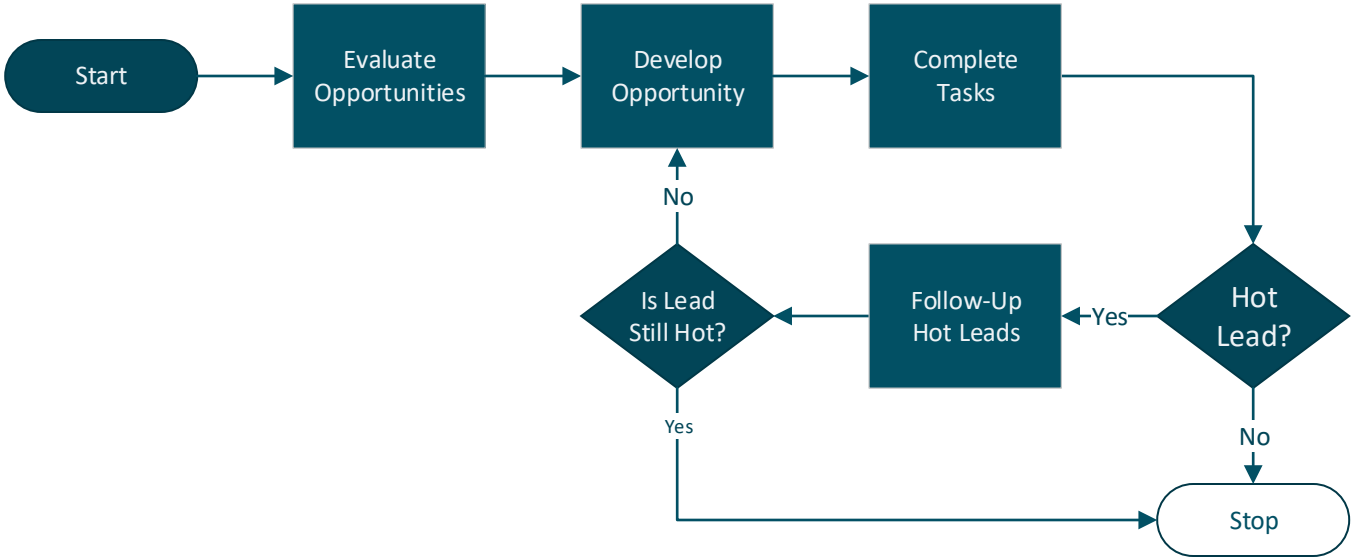
License Requirements:

STAGE: Field Service Inquiry



Role Assignments:
- Field Service Technician / Planner / Scheduler / Sales

License Requirements:



Role Assignments:
- Sales / Marketing

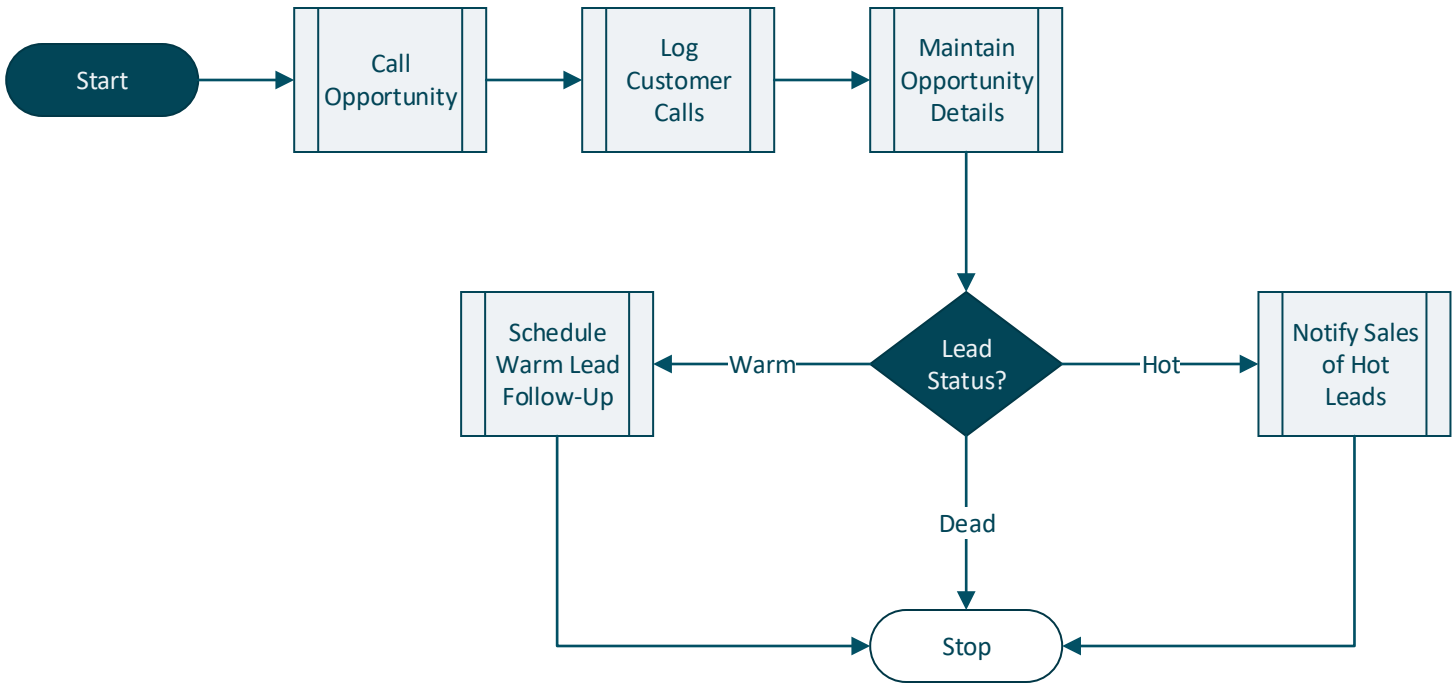
License Requirements:

STAGE: Evaluate Opportunities

Role Assignments:
- Marketing / Sales

License Requirements:

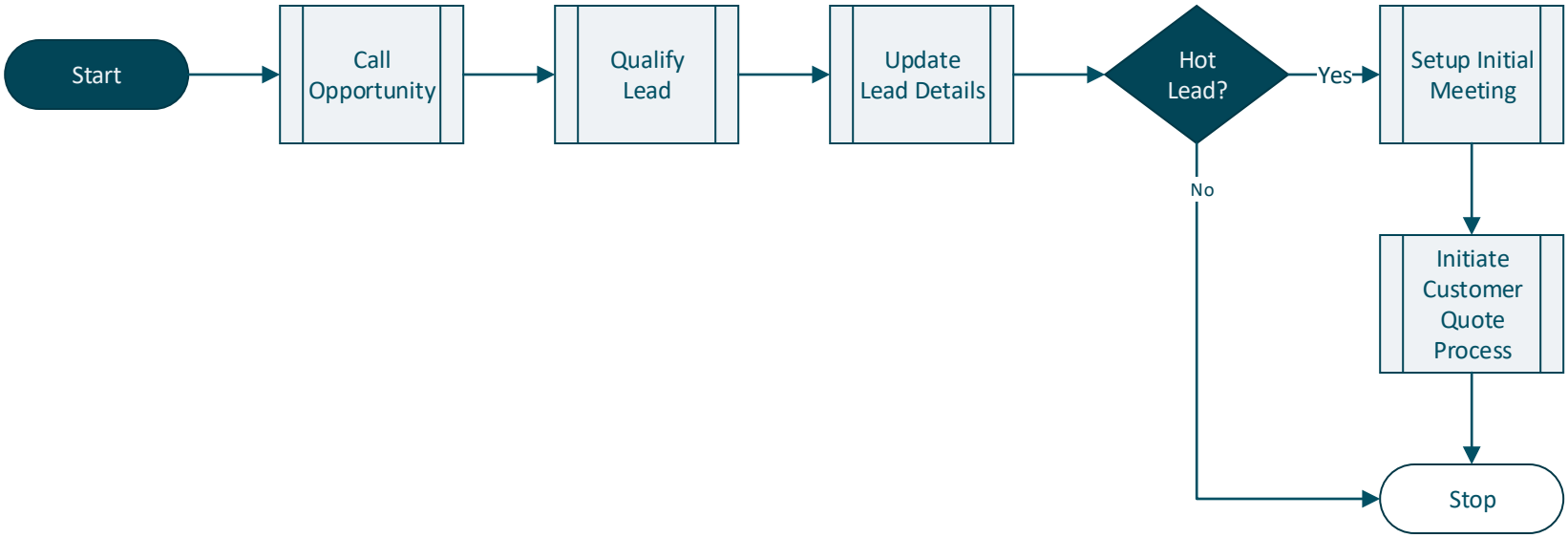
STAGE: Develop Opportunity



Role Assignments:
- Customer Service / Marketing / Sales

License Requirements:

STAGE: Follow-Up Hot Leads



Role Assignment:
- Sales

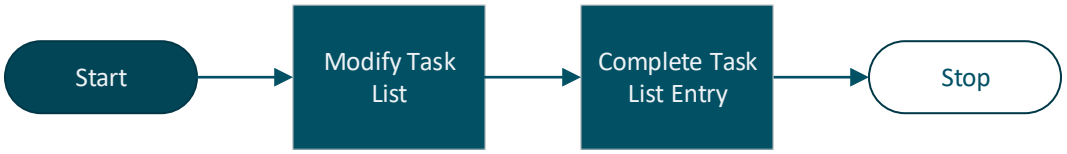
License Requirements:

STAGE: Complete Tasks

Role Assignment:
- Customer Service / Sales

License Requirements:

PROCESS: Maintain Task List

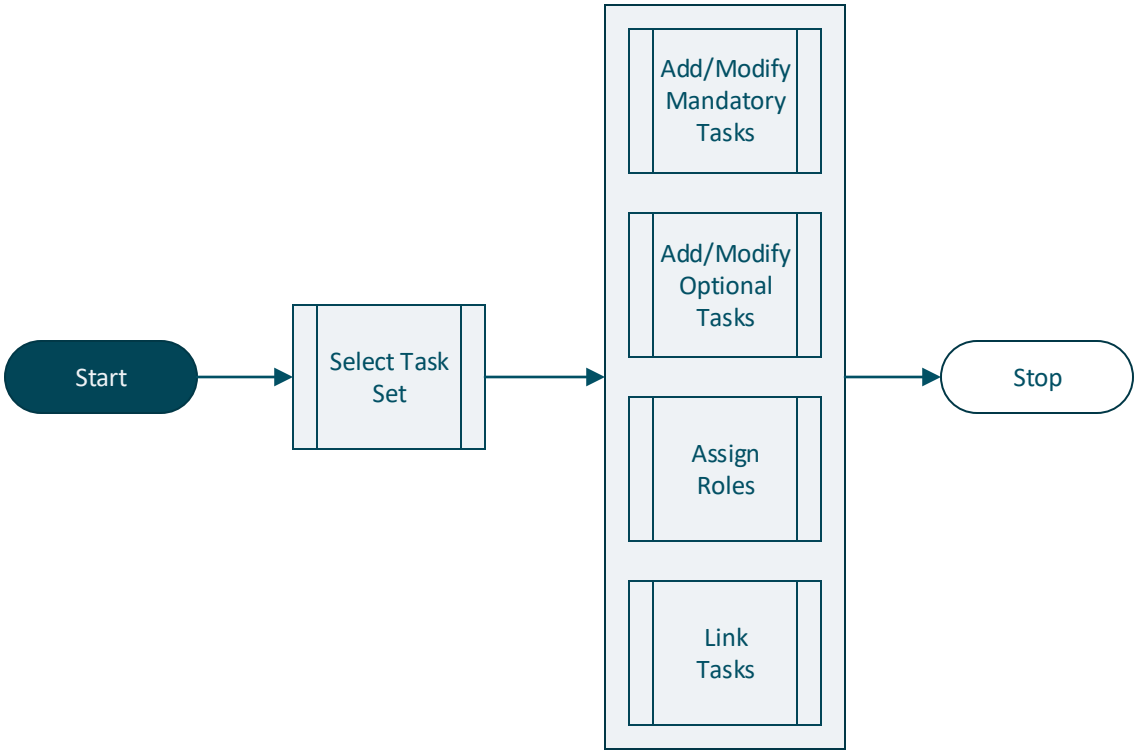


Role Assignments:
- Sales / Marketing

NOTE: Multiple task lists can be setup to track mandatory and optional tasks for Customer Relationship Management, Case Management or Engineering Change Orders

License Requirements:

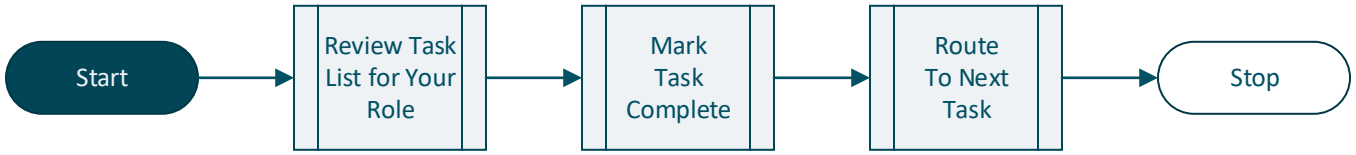
STAGE: Modify Task List



Role Assignment:
- Sales

License Requirements:

STAGE: Complete Task List Entry



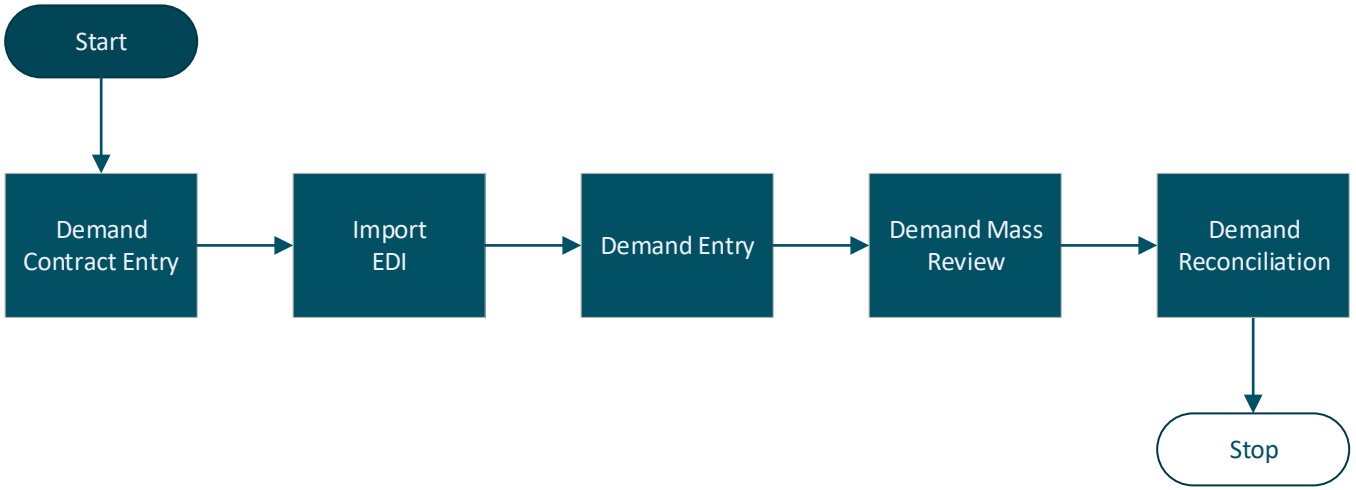
Role Assignment:
- Engineering / Sales

License Requirements:

Demand Management

FUNCTION MENU | MAINTAIN TASKS | PRE-SALES MENU

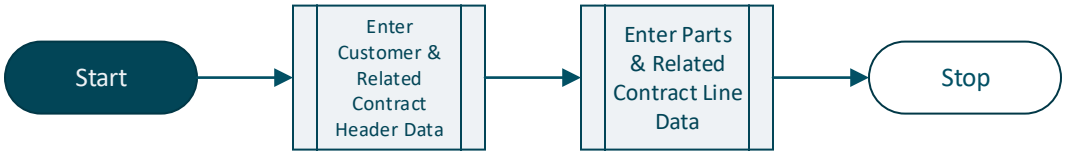
PROCESS: Demand Management



Role Assignment:
- Customer Service

License Reqirement:

STAGE: Demand Contract Entry



Role Assignment:
- Customer Service

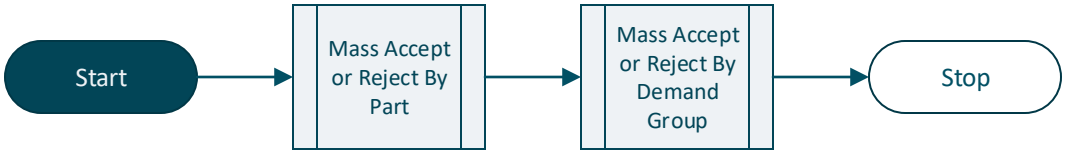
License Requirements:

Role Assignment:
- Customer Service

License Requirements:

Role Assignment:
- Customer Service

License Requirements:



Role Assignment:
- Customer Service

License Requiements:

Role Assignment:
- Customer Service

License Requirements

Post-Sales

FUNCTION MENU

POST SALES

Customer Order

Change of Address / Contact Information

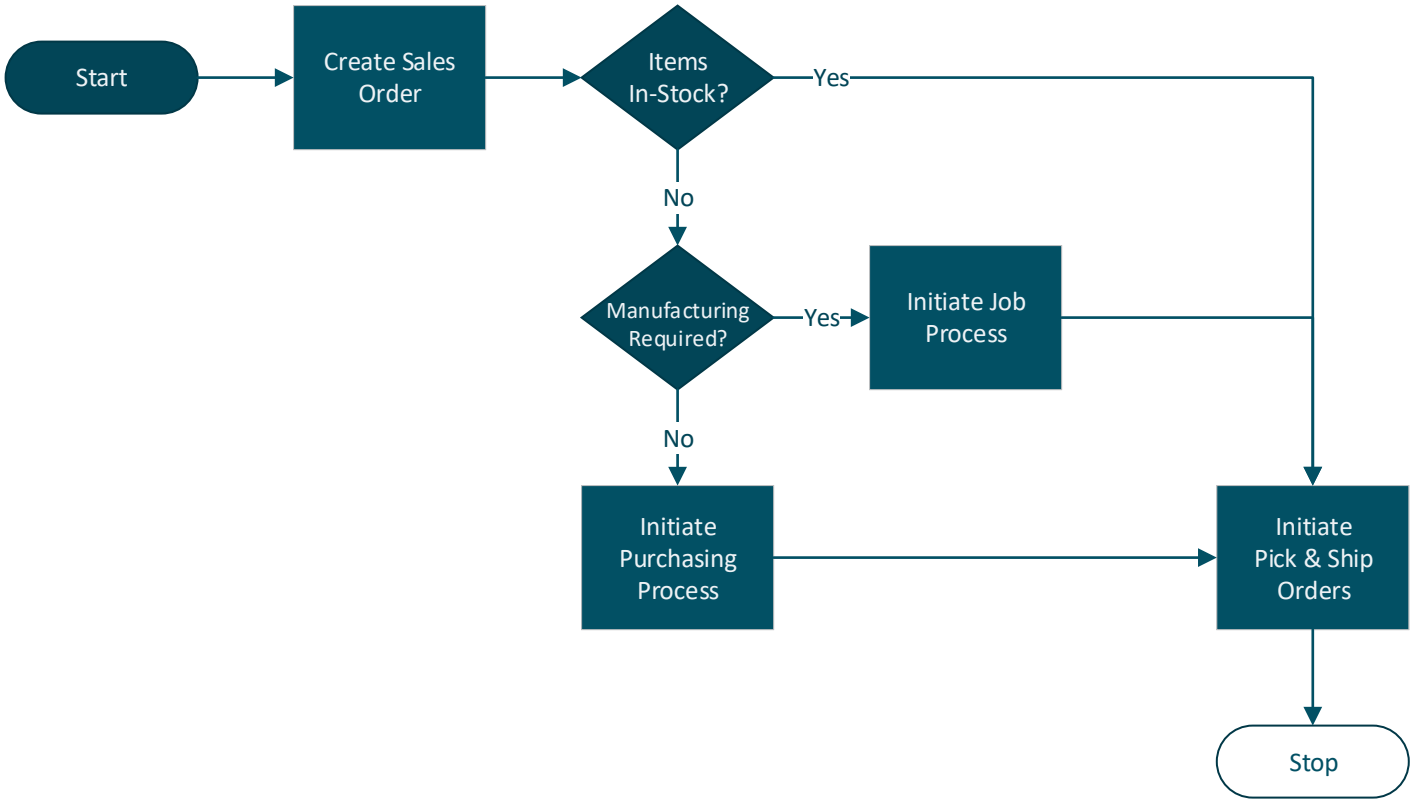
New Sales Rep

RMA Processing

Case Management

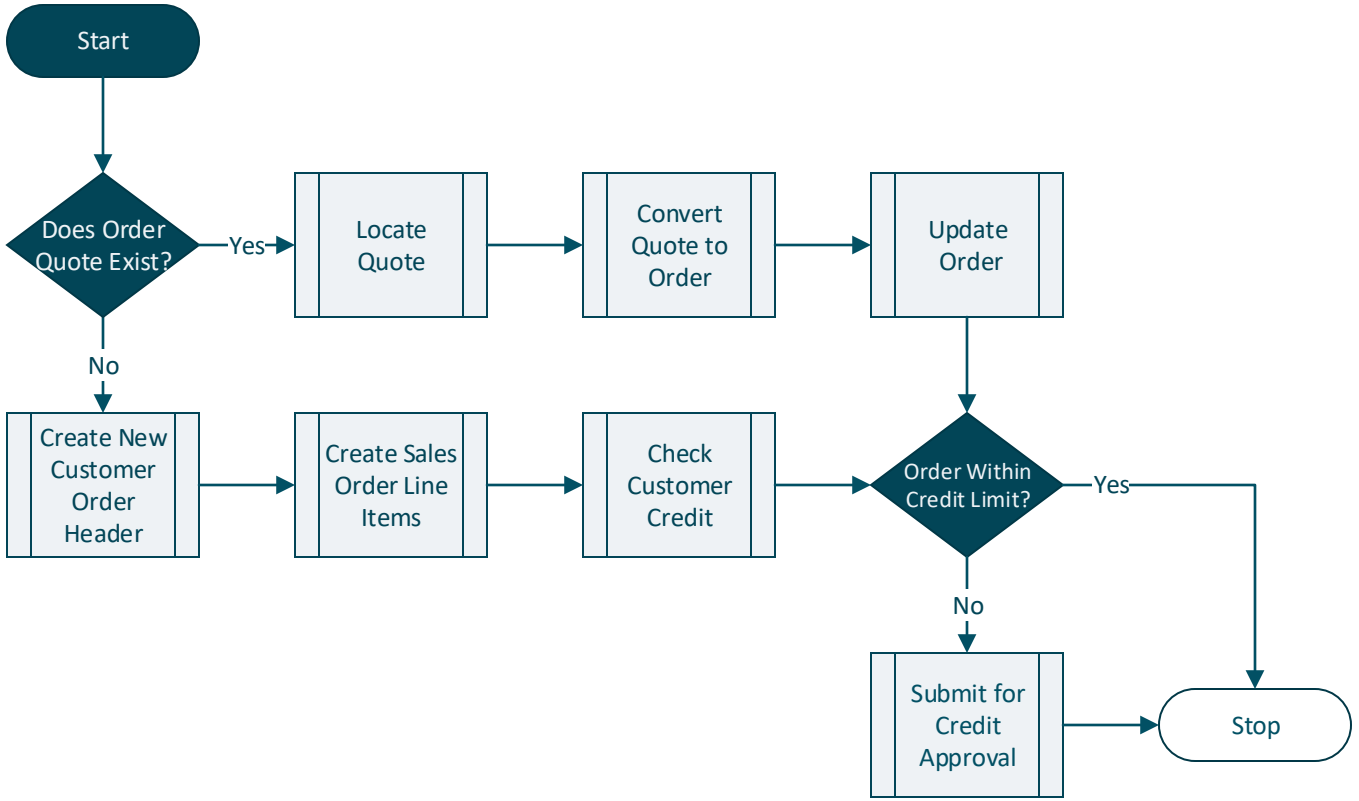
Sales Kits

PROCESS: Customer Order



Role Assignment:
- Sales / Production Planner / Shipping and Receiving / Finance

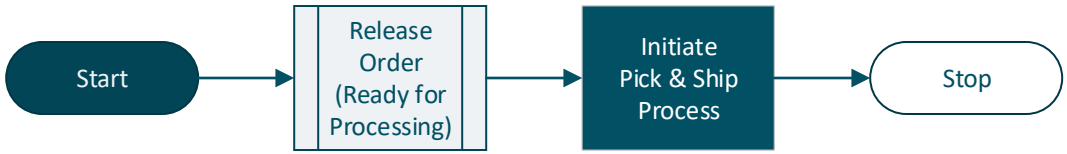
License Requirements



Role Assignment:
- Sales

License Requirements:

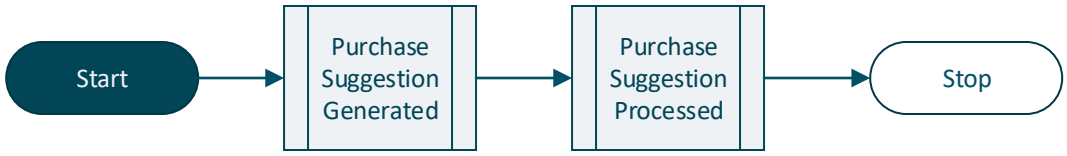
STAGE: Initiate Pick & Ship Orders



Role Assignment:
- Shipping & Receiving

License Requirements:

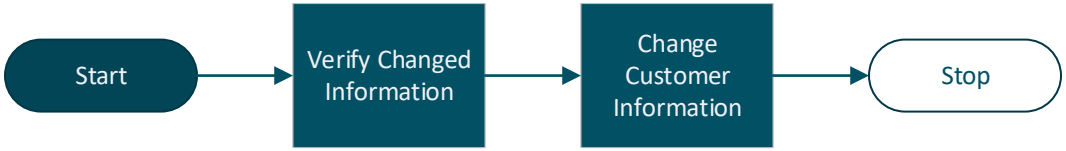
STAGE: Initiate Purchasing Process



Role Assignment:
- Shipping & Receiving

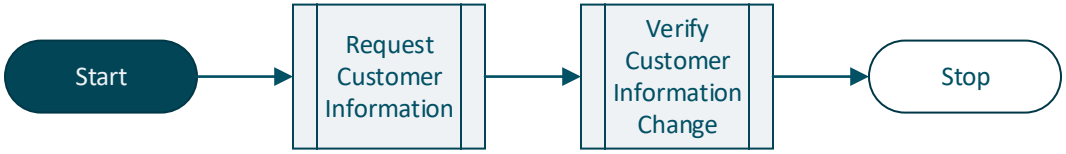
License Requirements:

PROCESS: Change of Address/Contact Information



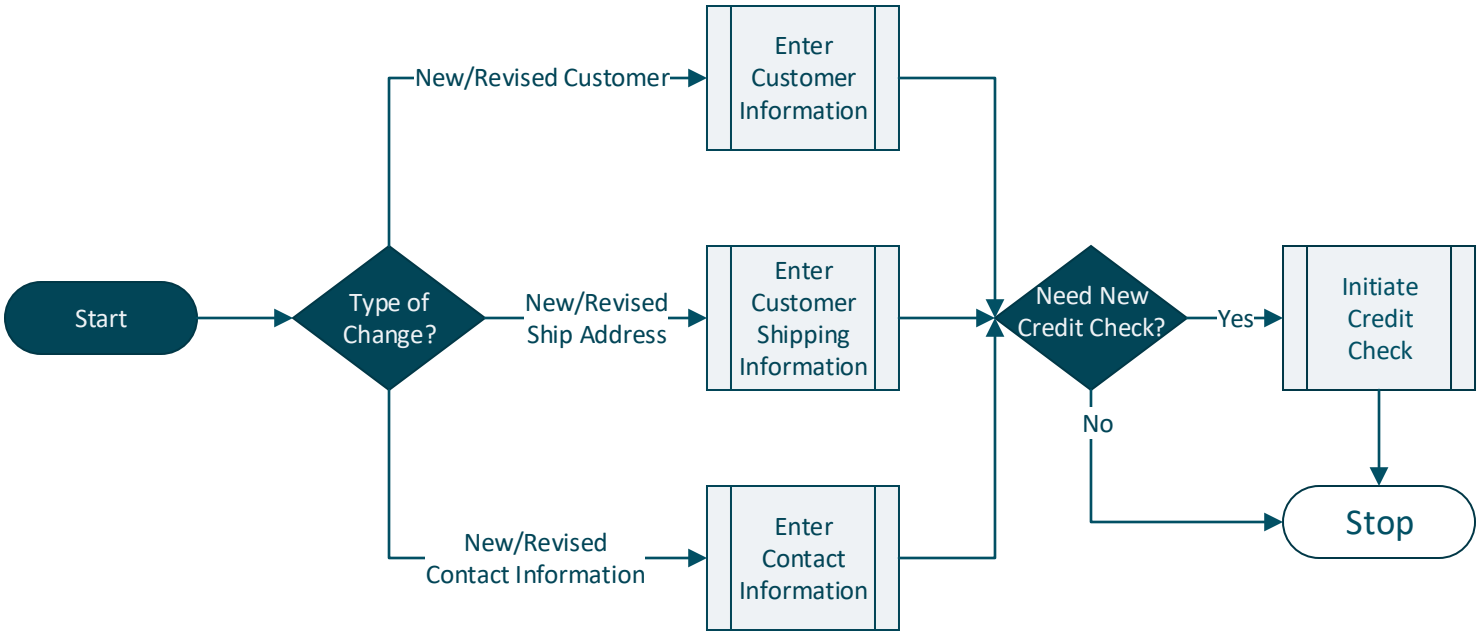
Role Assignment:
- Sales

License Requirements



Role Assignment:
- AR Entry

License Requirements:



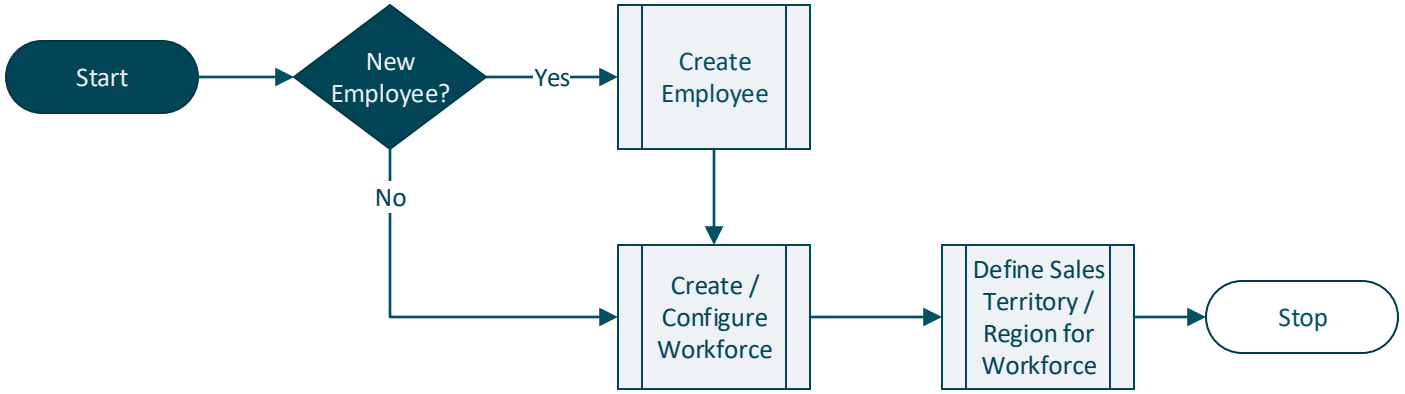
Role Assignment:
- AR Entry

License Requirements:

PROCESS: New/Modified Sales Rep

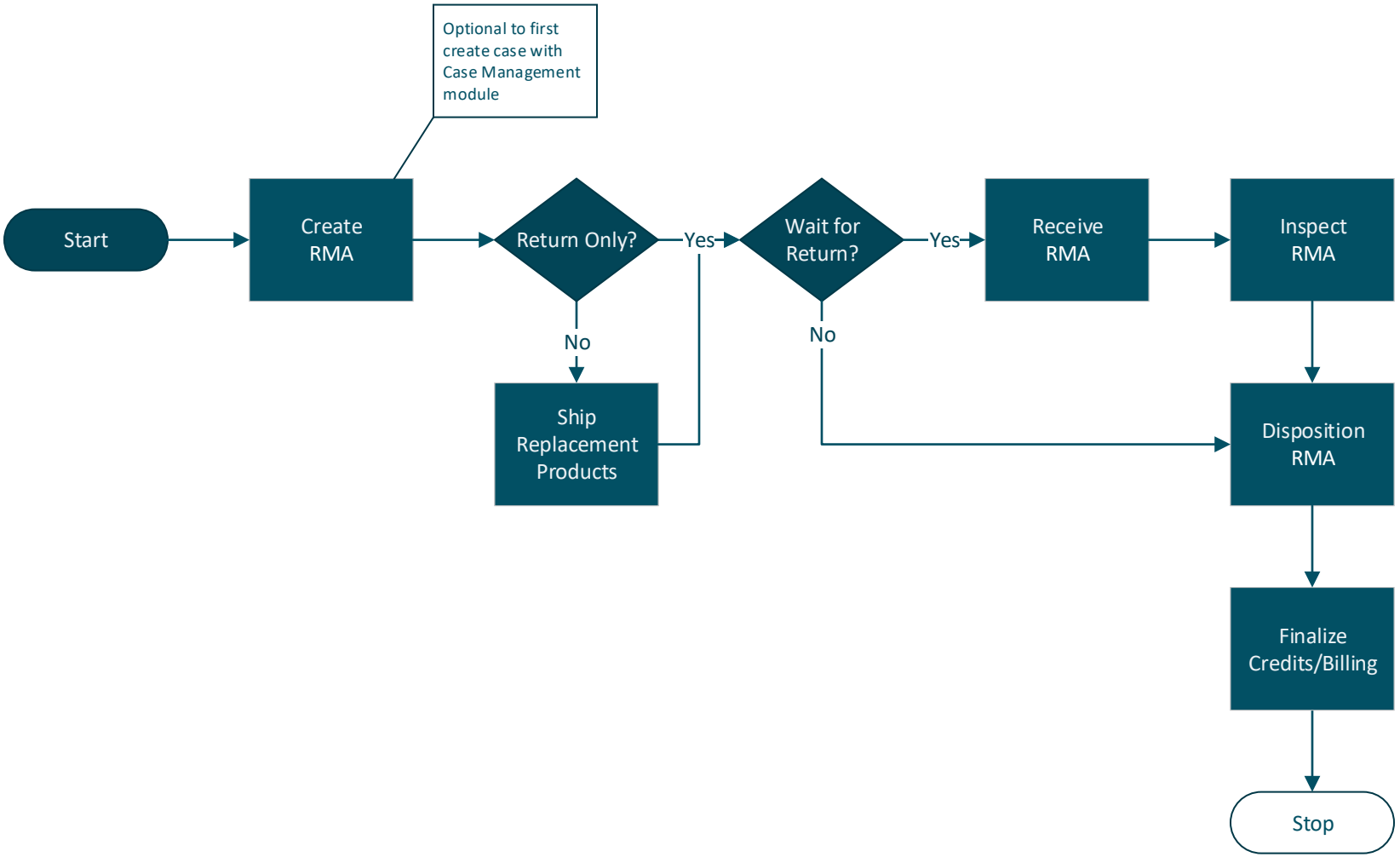
Role Assignment:
- Sales

License Requirements:



Role Assignment:
- Sales

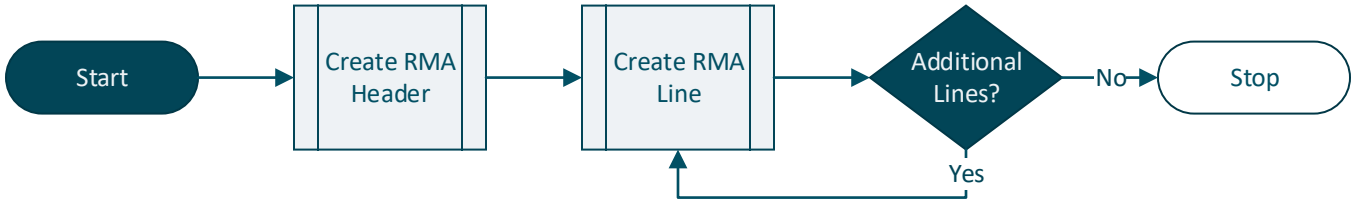
License Requirements:



Role Assignment:
- Sales / Quality / Shipping and Receiving / Finance

NOTE: Disposition of RMA is triggered by any one of these three outputs: 1) Ship Replacement Products, 2) Inspect RMA, or 3) Wait for Return? (decision output)

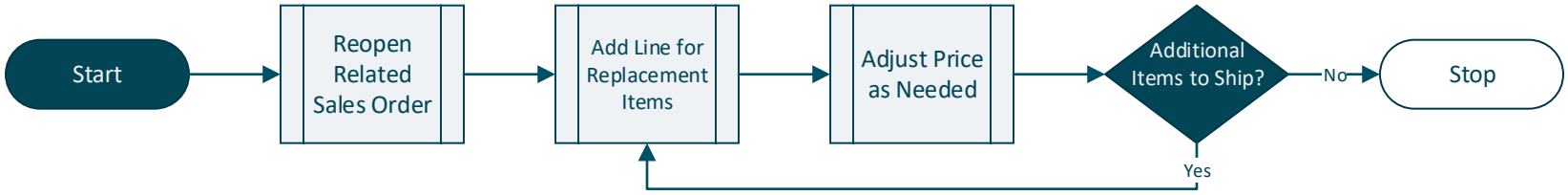
License Requirements:



Role Assignment:
- Sales

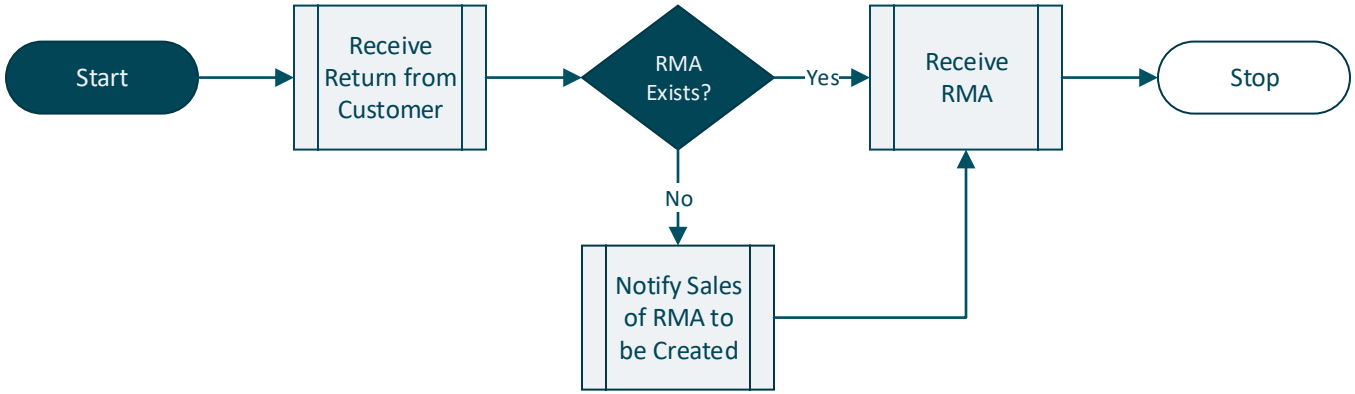
License Requirements:

STAGE: Ship Replacement Products



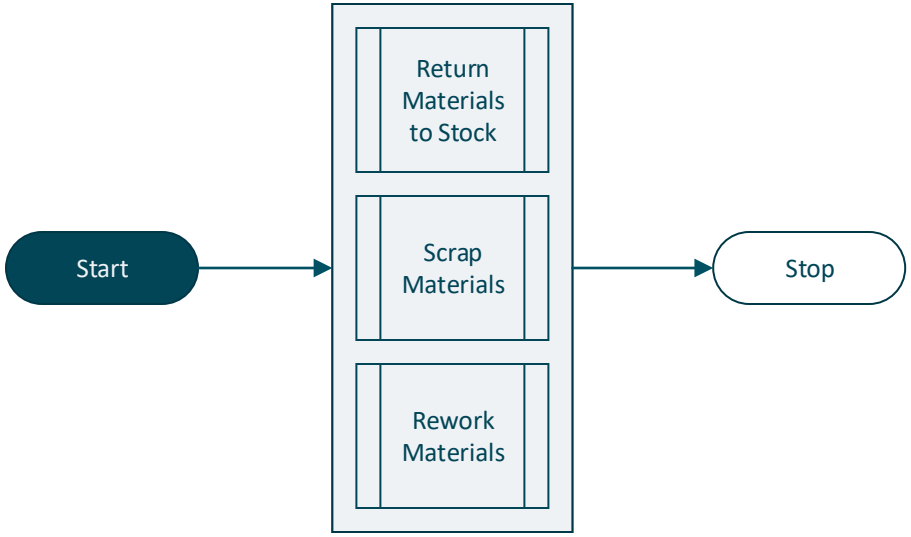
Role Assignment:
- Sales

License Requirements:



Role Assignment:
- Shipping & Receiving

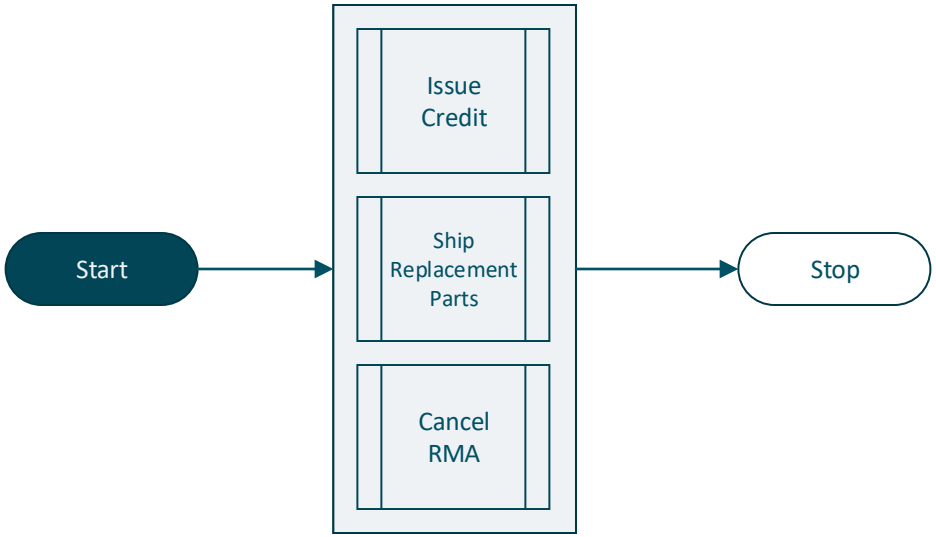
License Requirements:



Role Assignment:
- Quality

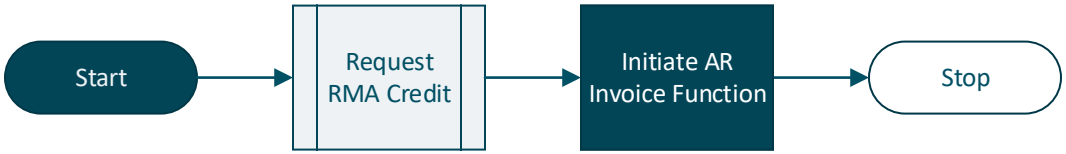
License Requirements:

STAGE: Disposition RMA



Role Assignment:
- Sales

License Requirements:

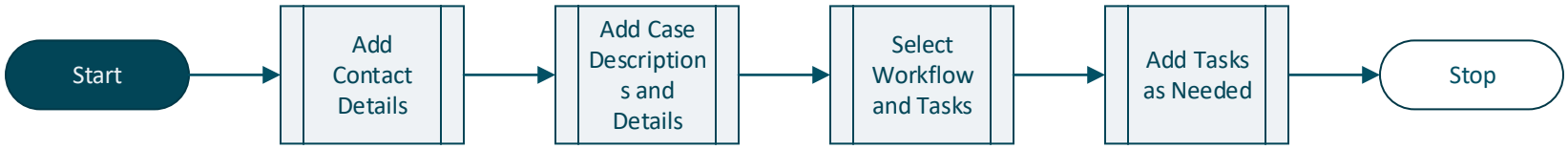


Role Assignment:
- AR Entry

License Requirements:

Role Assignment:
- Customer Service

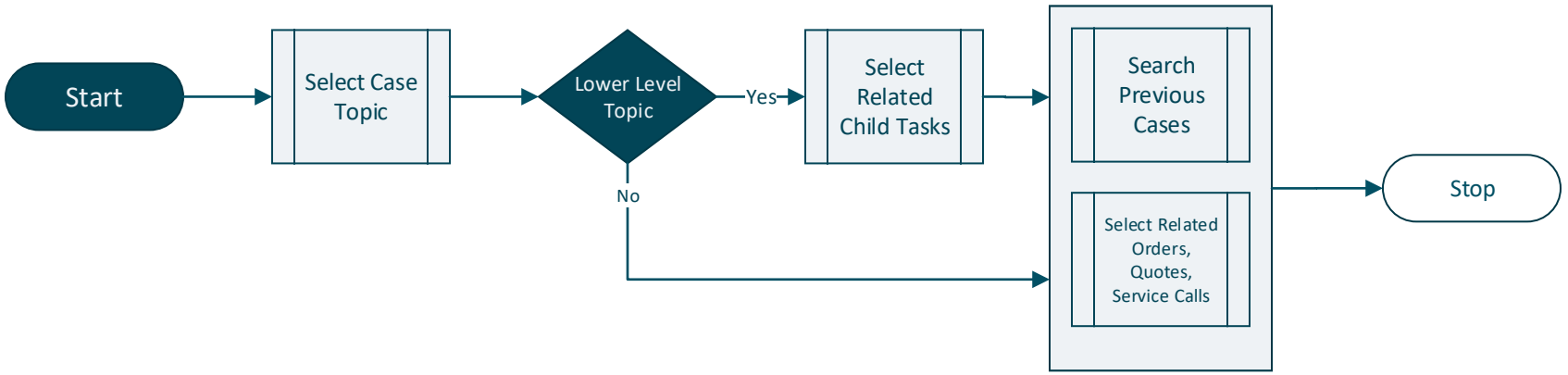
License Reqirement:



Role Assignment:
- Customer Service

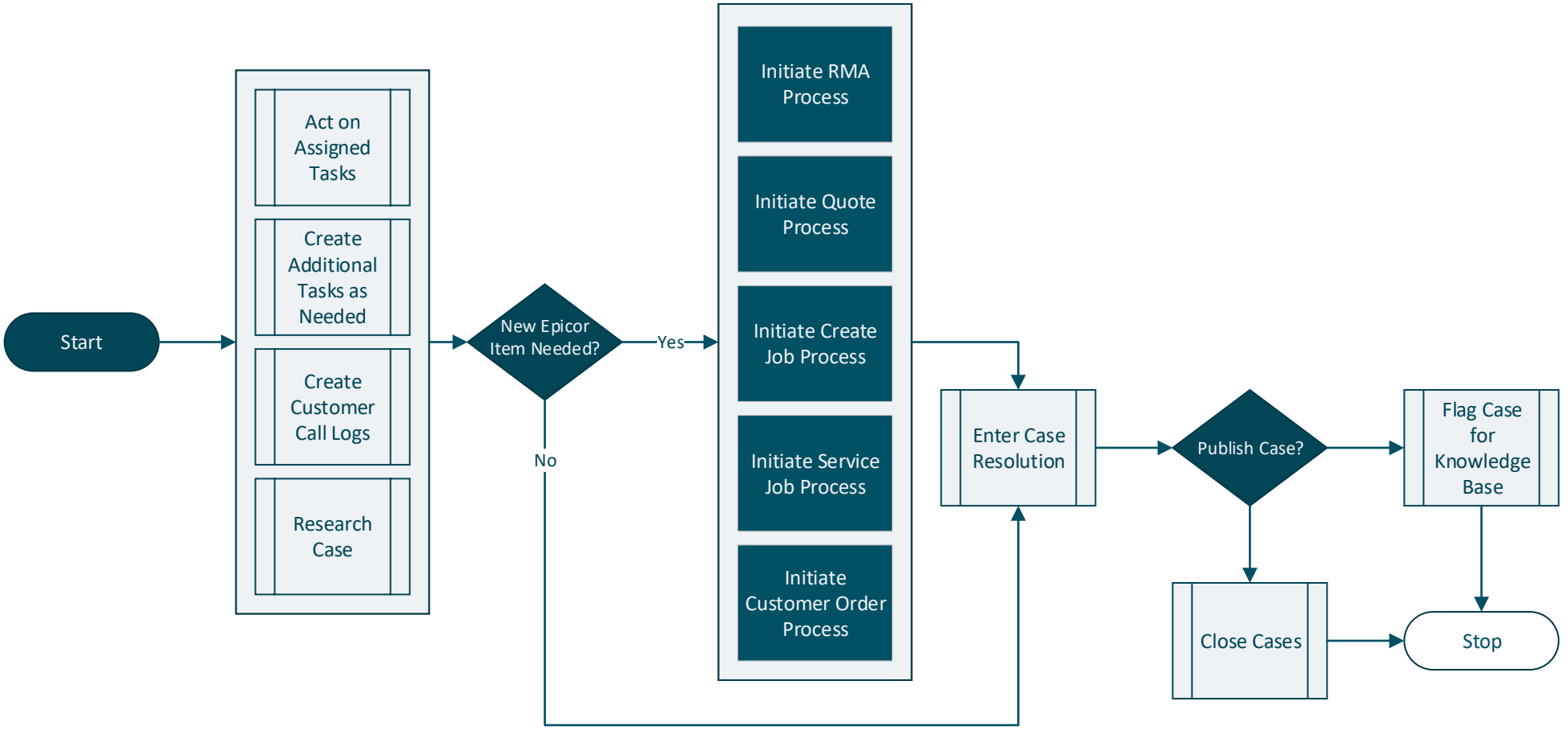
License Reqirement:

STAGE: Research Case



Role Assignment:
- Customer Service

License Reqirement:



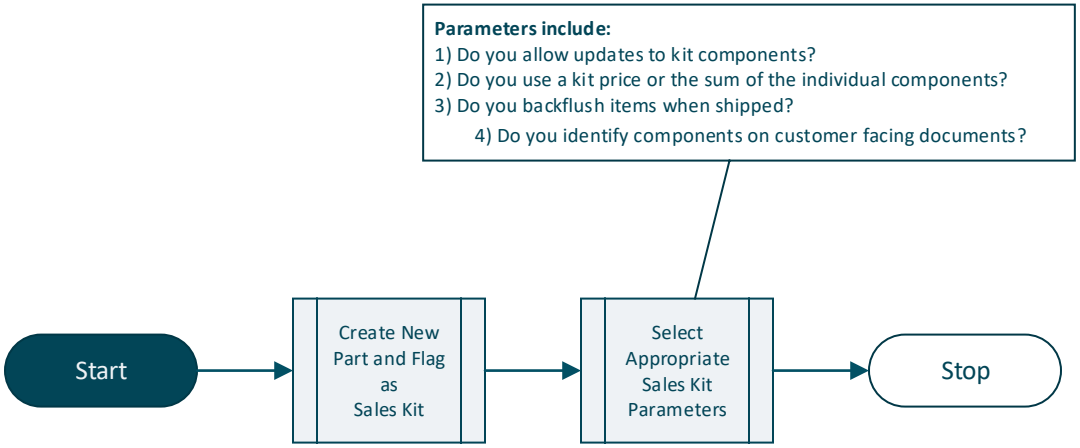
Role Assignment:
- Customer Service

License Reqirement:

PROCESS: Sales Kits

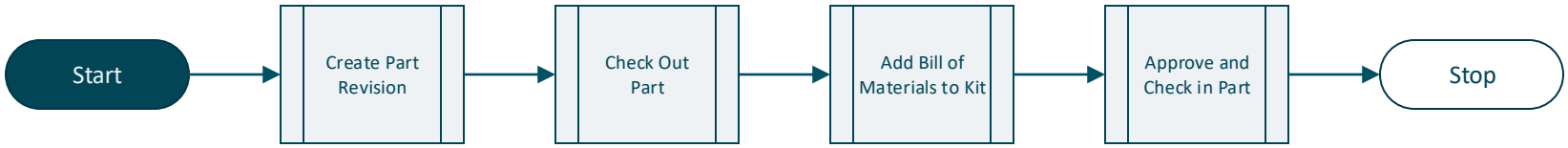
Role Assignment:
- Sales

License Requirements:



Role Assignment:
- Inventory Control / Sales

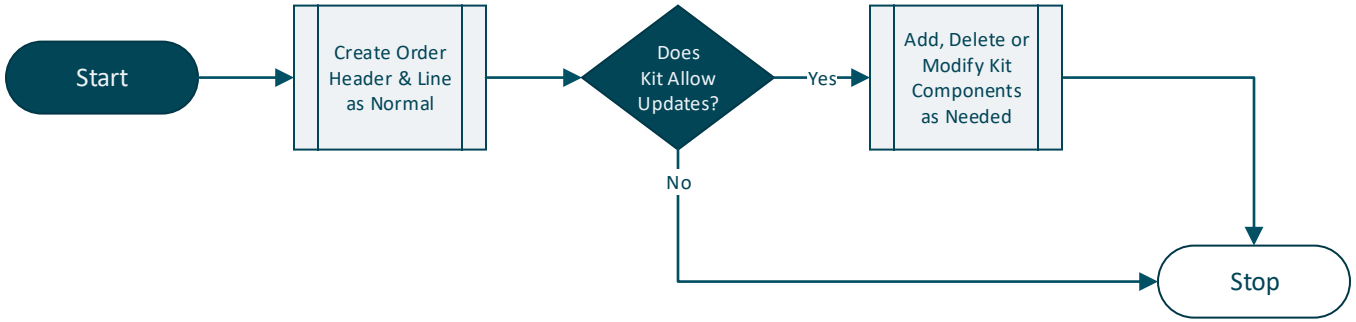
License Requirements:



Role Assignment:
- Engineering

Notes: NOTE: There is no bill of operations in a sales kit. Items are shipped from stock without any time capture.

License Requirements:



Role Assignment:
- Customer Service / Sales

License Requirements:

Contracts and Projects

FUNCTION MENU

CONTRACTS AND PROJECT MENU

Projects

Time and Milestone Billing

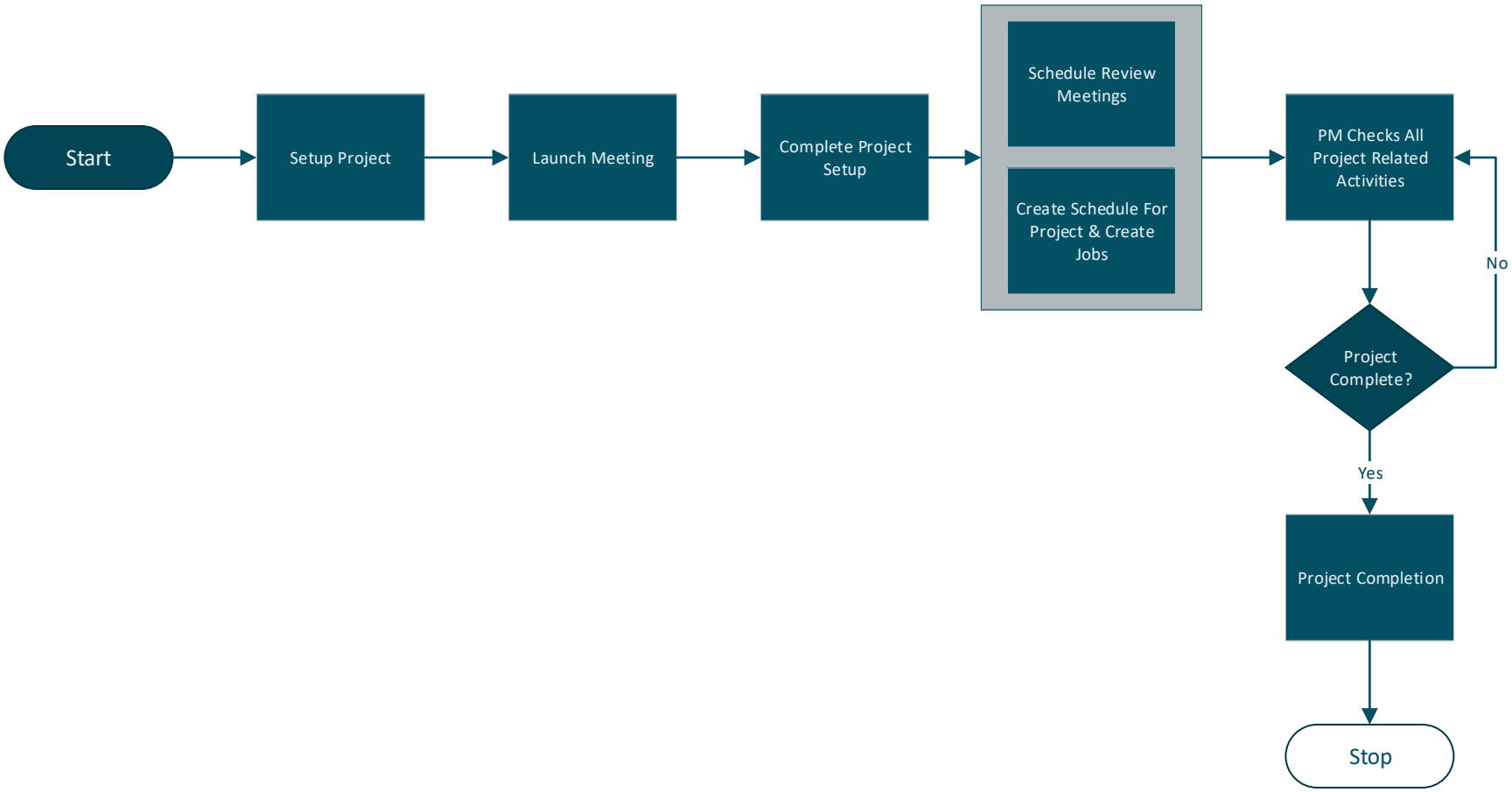
Cost Plus Billing

Fixed Fee Billing

Progress Pay Billing

Program Management

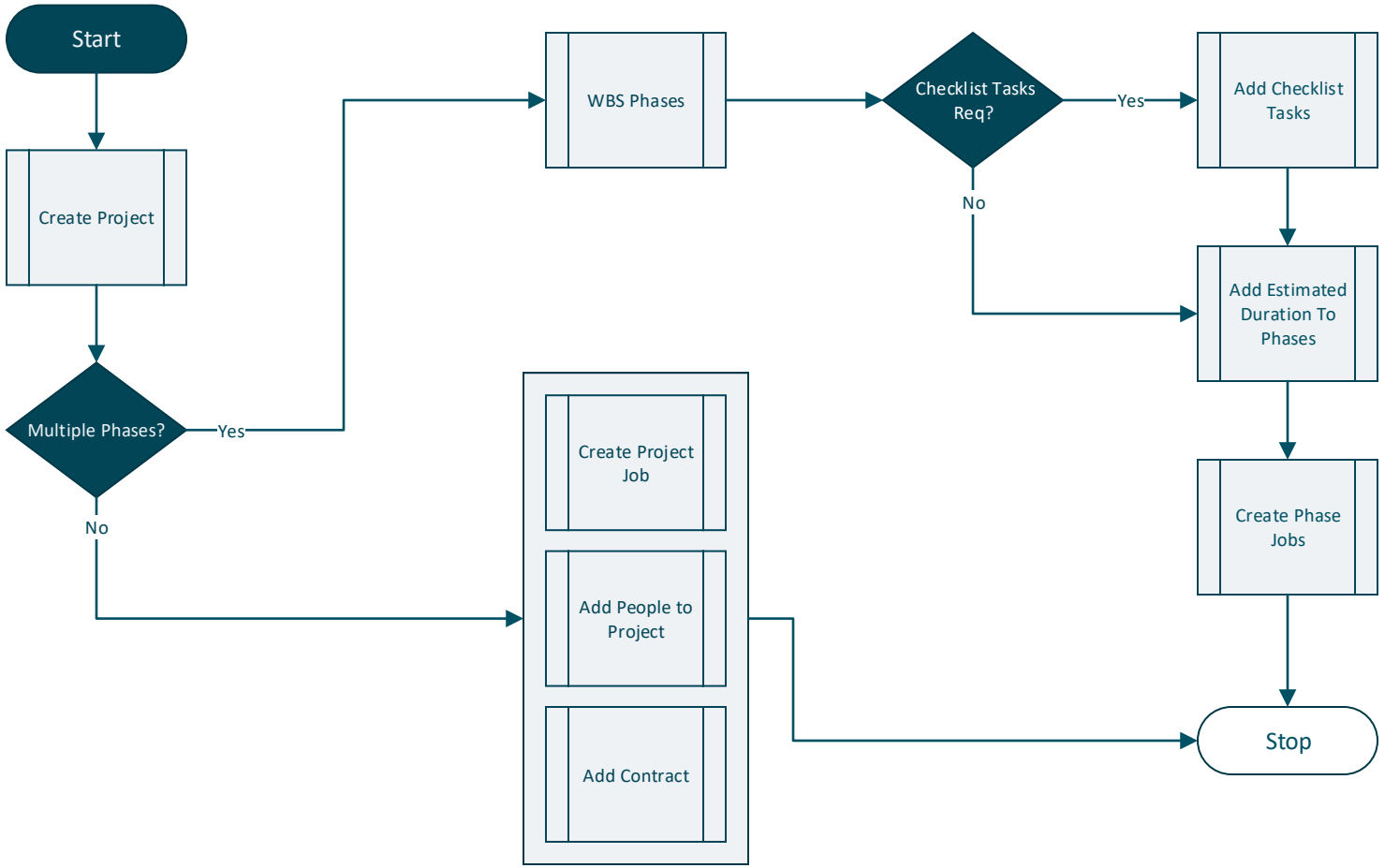
Process: Projects



Role Assignment:
- Epicor Project Manager / Contracts / Accounting Manager

License Requirements: Project Management

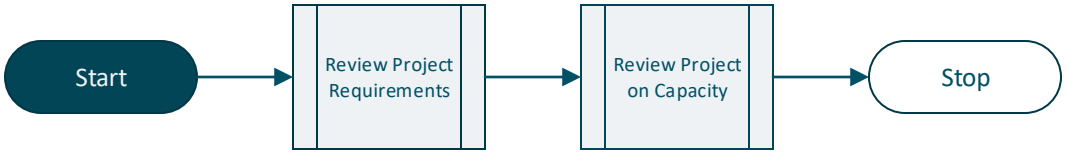
Stage: Setup Project



Role Assignments:
- Accounting Manager / Project Manager/Contracts

License Requirements: Project Management

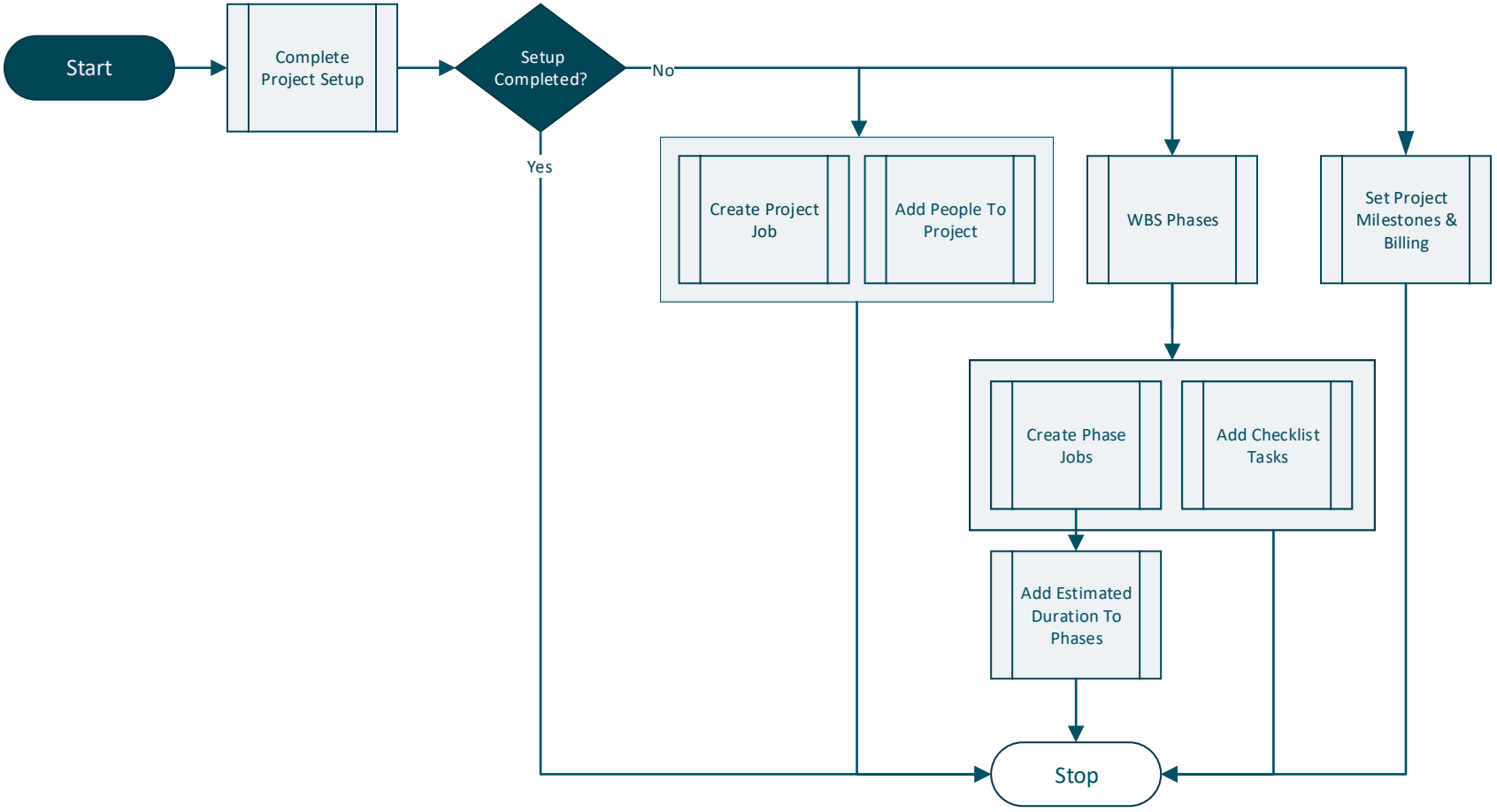
STAGE: Launch Meeting



Role Assignment:
- Engineering / Planner / Scheduler / Project Manager/Contracts / Sales

License Requirements: Project Management

STAGE: Complete Project Setup



Role Assignments:
- Epicor Project Manager/Contracts

License Requirements: Project Management

STAGE: Schedule Review Meetings

Role Assignment:
- Epicor Project Manager/Contracts

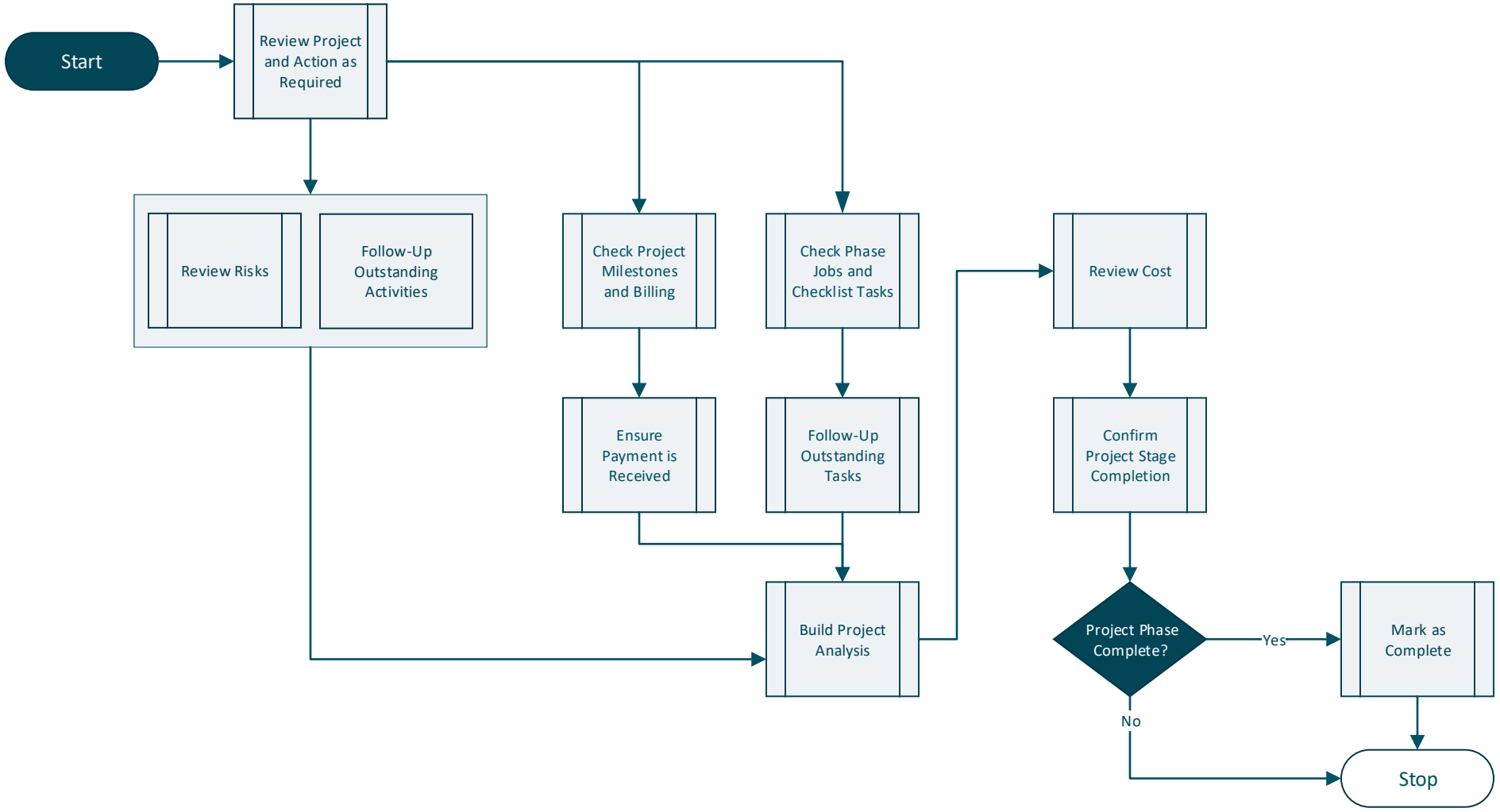
License Requirements: Project Management

STAGE: Create Schedule for Project - Create Jobs

Role Assignment:
- Engineering / Planner / Scheduler / Epicor Project Manager/Contracts

License Requirements: Project Management

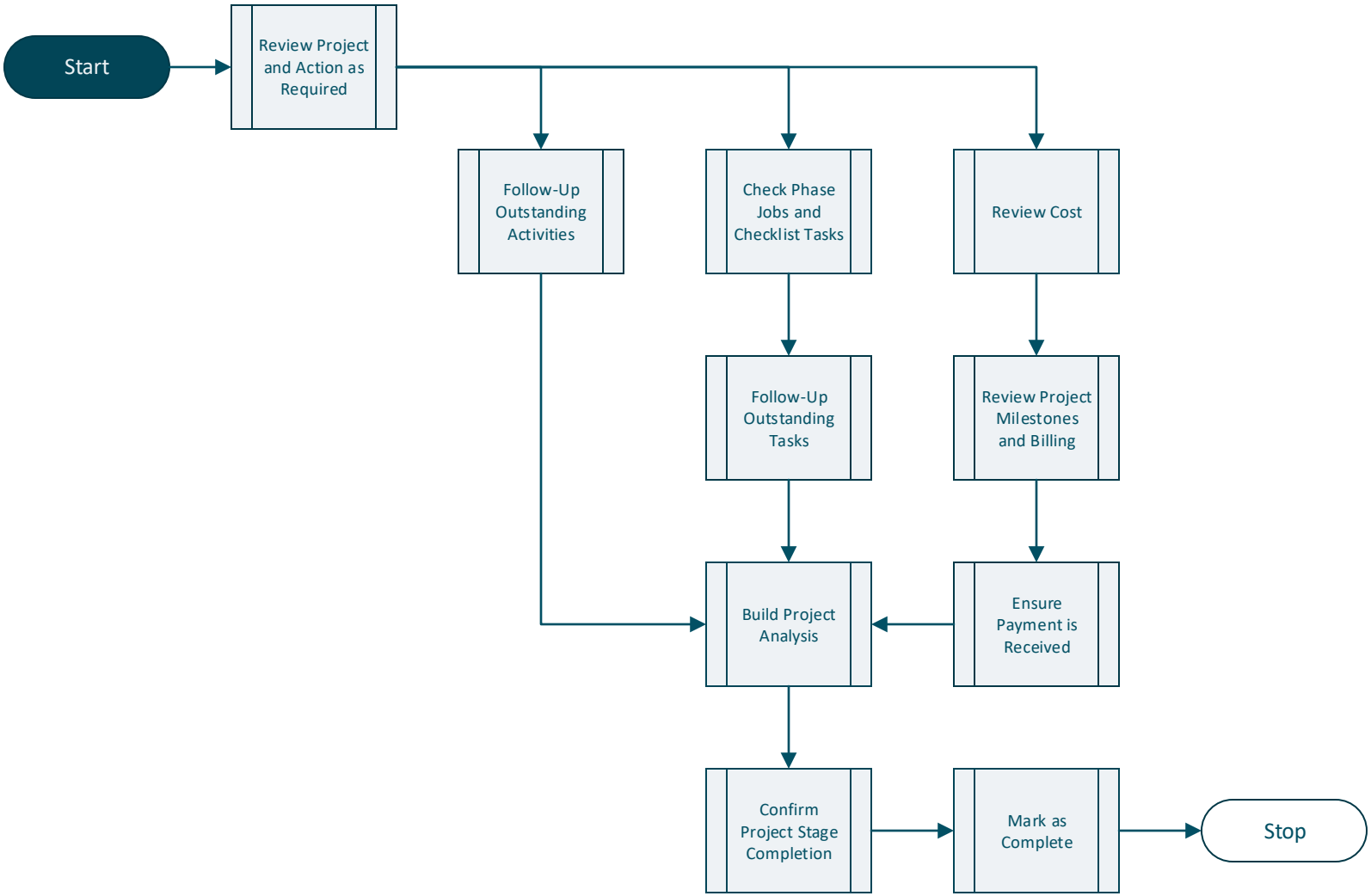
Stage: PM Checks All Project Related Activities



Role Assignment:
- Project Manager/Contracts

License Requirements: Project Management

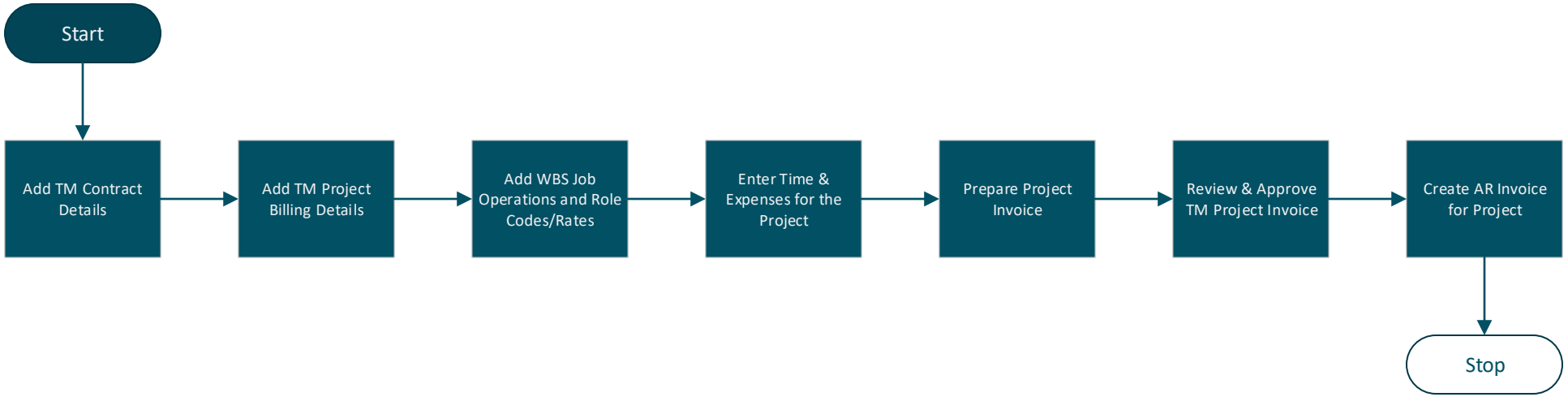
STAGE: Project Completion



Role Assignments:
- Epicor Project Manager/Contracts

License Requirements: Project Management

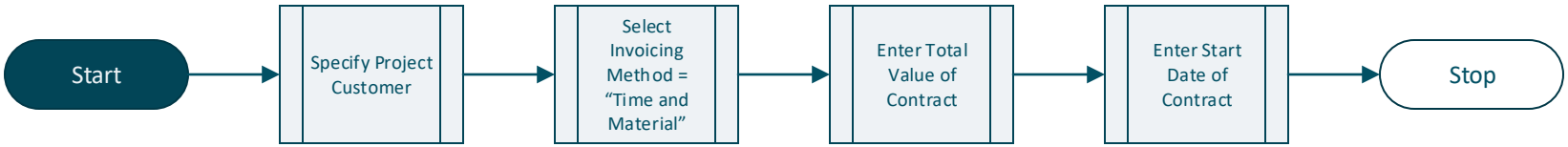
PROCESS: T & M Billing



Role Assignment:
- Epicor Project Manager / Contracts

License Requirements: Project Management

STAGE: Add TM Contract Details



Role Assignment:
- Epicor Project Manager / Contracts

License Requirements: Project Management

STAGE: Add TM Project Billing Details

Role Assignment:
- Epicor Project Manager / Contracts

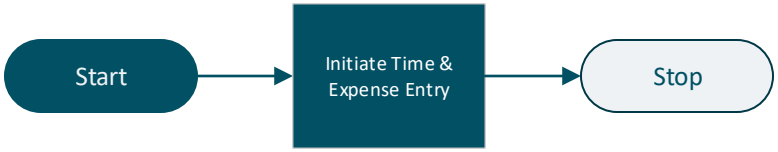
License Requirements: Project Management

STAGE: Add WBS Job Operations, Roles and Hours

Role Assignment:
- AR Entry

License Requirements: Project Management

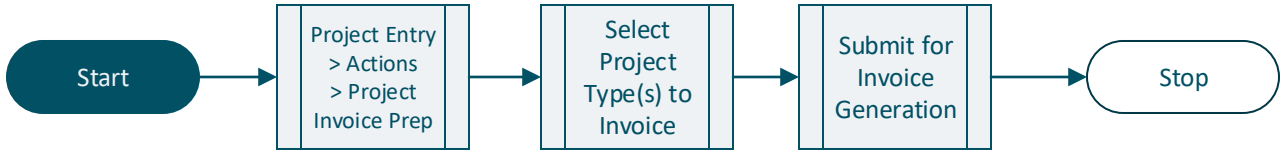
STAGE: Enter Time & Expenses for the Project



Role Assignment:
- AR Entry

License Requirements: Project Management

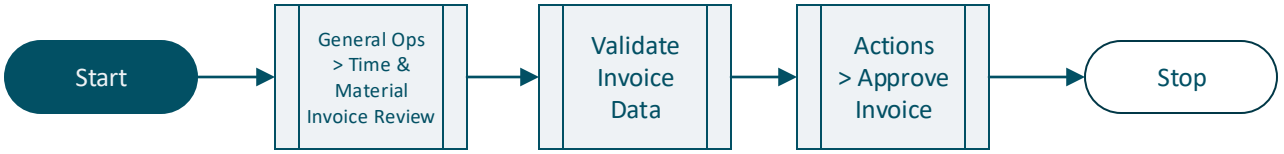
STAGE: Prepare Project Invoice



Role Assignment:
- AR Entry

License Requirements: Project Management

STAGE: Review & Approve TM Project Invoice



Role Assignment:
- AR Entry

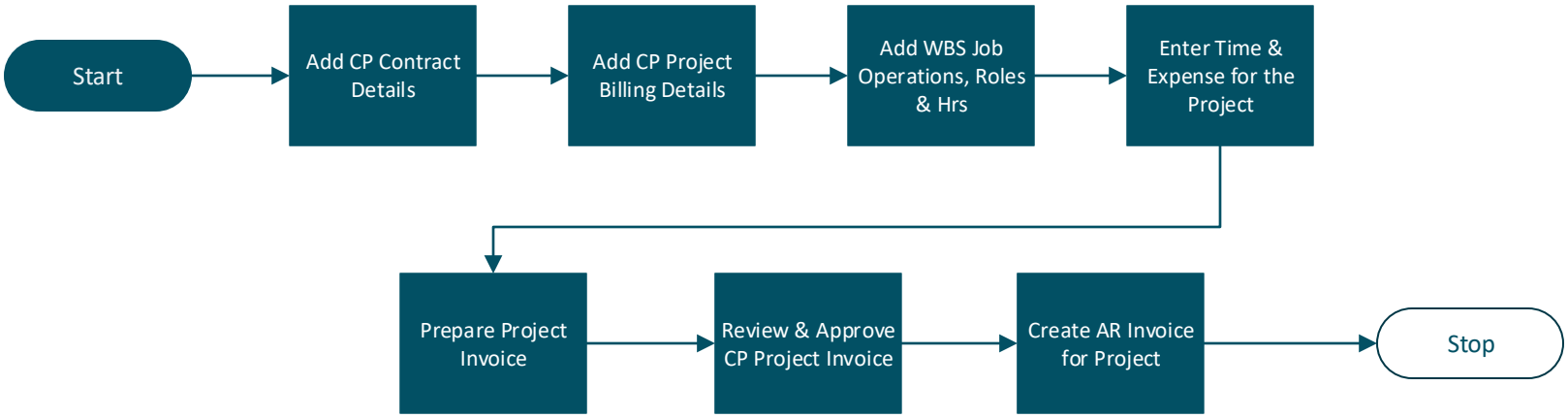
License Requirements: Project Management

STAGE: Create AR Invoice for Project

Role Assignment:
- AR Entry

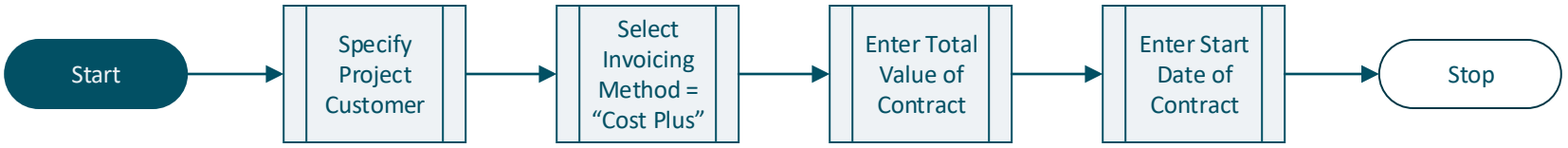
License Requirements: Project Management

PROCESS: Cost Plus Billing



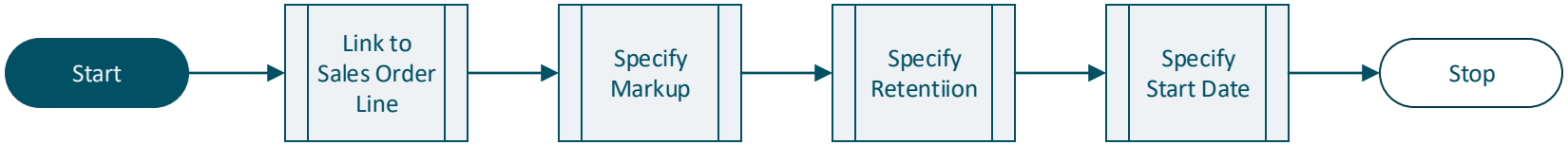
Role Assignment:
- AR Entry

License Requirements: Project Management



Role Assignment:
- AR Entry

License Requirements: Project Management



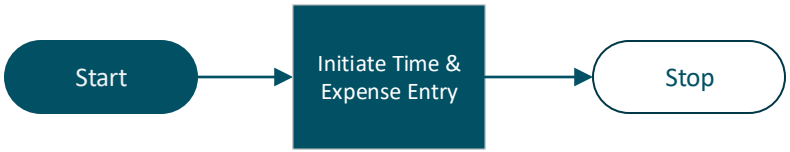
Role Assignment:
- AR Entry

License Requirements: Project Management

STAGE: Add WBS Job Operations, Roles and Hours

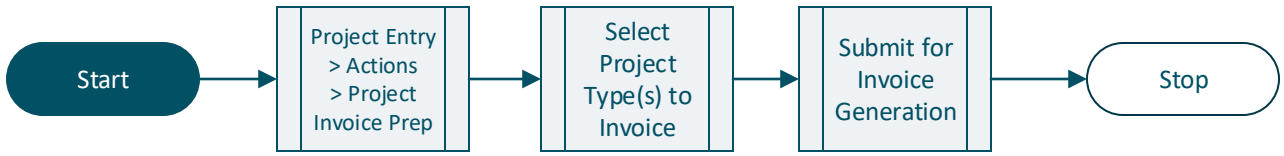
Role Assignment:
- AR Entry

License Requirements: Project Management



Role Assignment:
- AR Entry

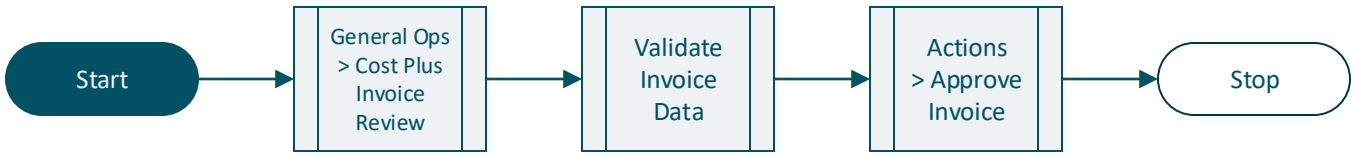
License Requirements: Project Management



Role Assignment:
- AR Entry

License Requirements: Project Management

STAGE: Review & Approve CP Project Invoice

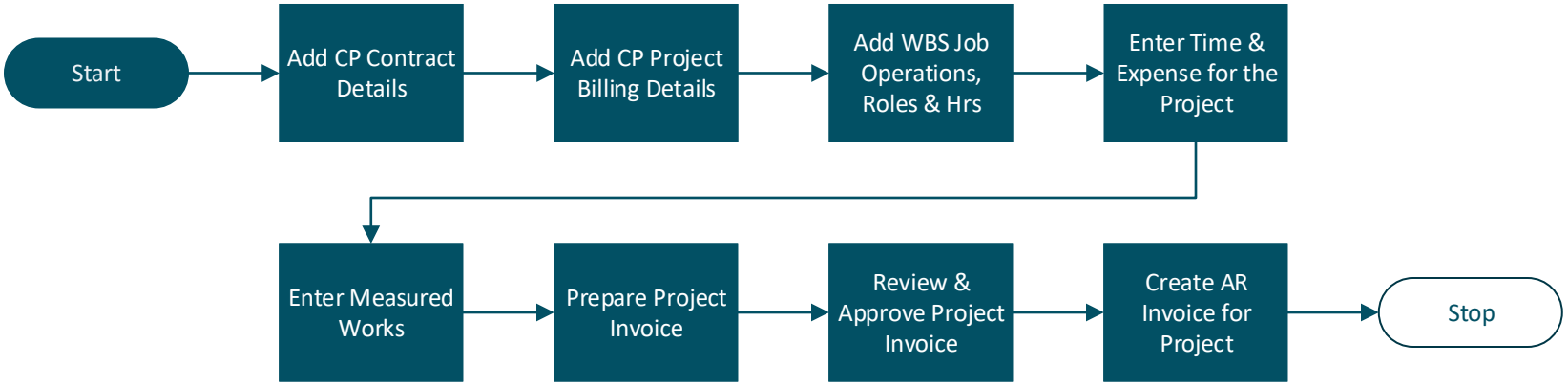


Role Assignment:
- AR Entry

License Requirements: Project Management

Role Assignment:
- AR Entry

License Requirements: Project Management



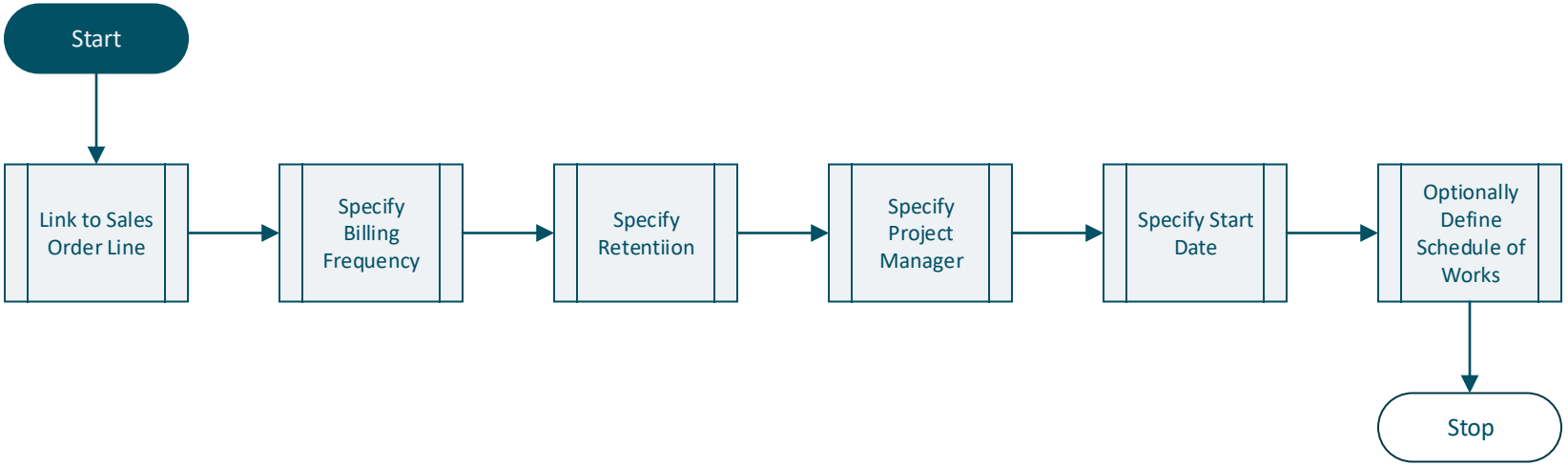
Role Assignment:
- AR Entry

License Requirements: Project Management

Role Assignment:
- AR Entry

License Requirements: Project Management

STAGE: Add Progress Payment Details

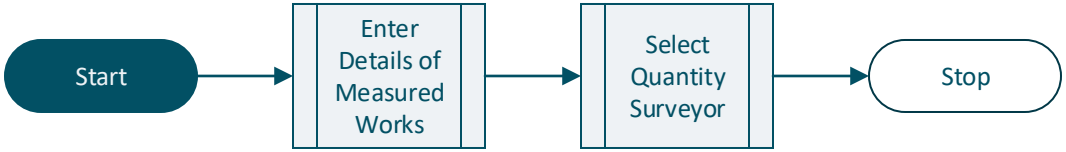


Role Assignment:
- AR Entry

License Requirements: Project Management

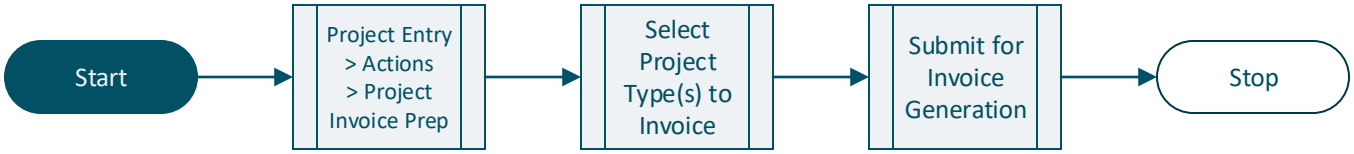
Role Assignment:
- AR Entry

License Requirements: Project Management



Role Assignment:
- AR Entry

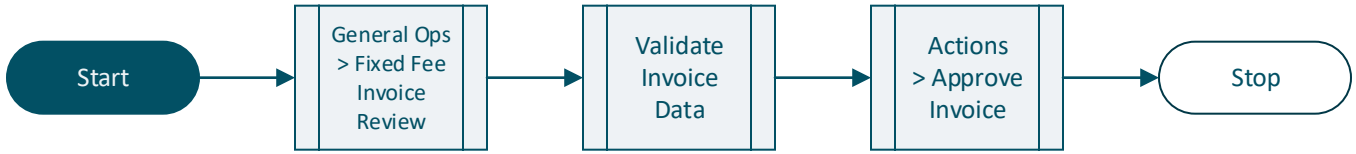
License Requirements: Project Management



Role Assignment:
- AR Entry

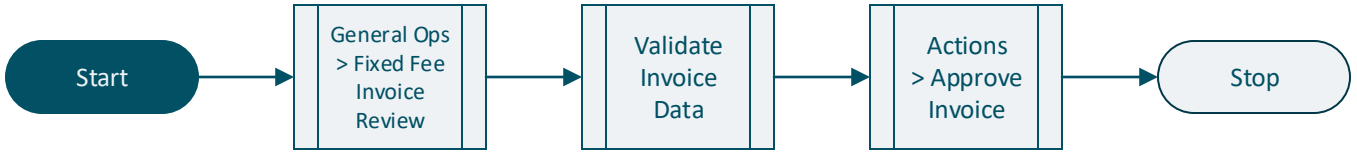
License Requirements: Project Management

STAGE: Review & Approve Project Invoice



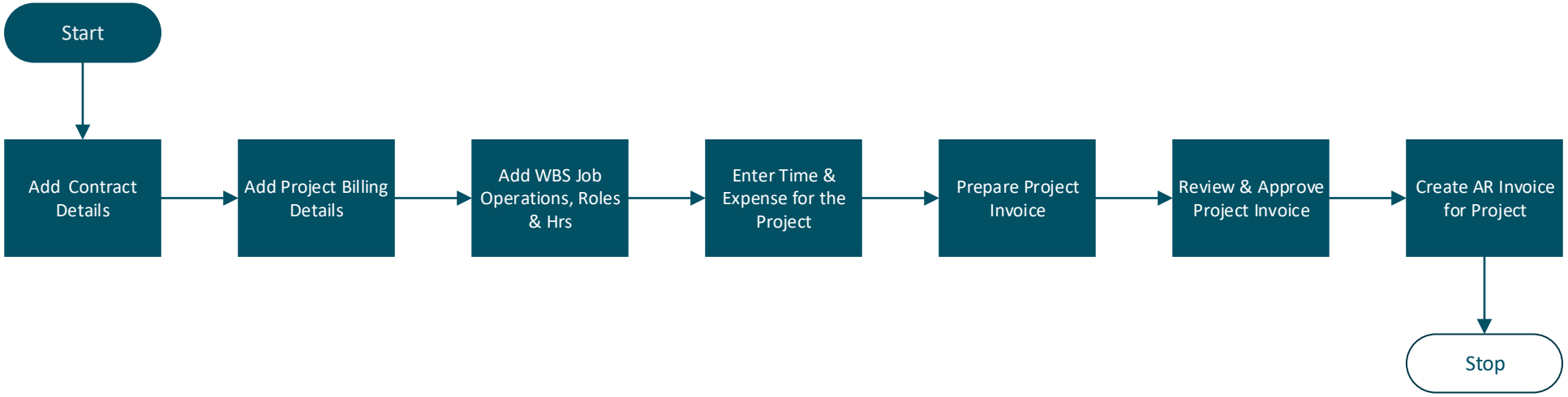
Role Assignment:
- AR Entry

License Requirements: Project Management



Role Assignment:
- AR Entry

License Requirements: Project Management



Role Assignment:
- AR Entry

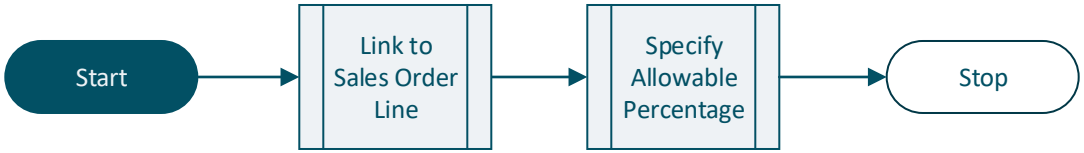
License Requirements:

STAGE: Add Contract Details

Role Assignment:
- AR Entry

License Requirements: Project Management

STAGE: Add Project Billing Schedules



Role Assignment:
- AR Entry

License Requirements: Project Management

STAGE: Add WBS Job Operations, Roles and Hours

Role Assignment:
- AR Entry

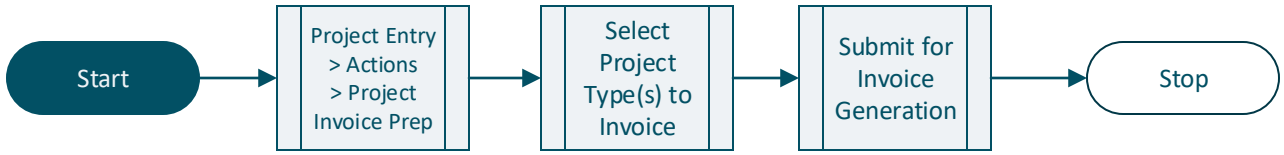
License Requirements: Project Management

STAGE: Enter Time & Expenses for the Project

Role Assignment:
- AR Entry

License Requirements: Project Management

STAGE: Prepare Project Invoice



Role Assignment:
- AR Entry

License Requirements: Project Management

STAGE: Review & Approve Project Invoice

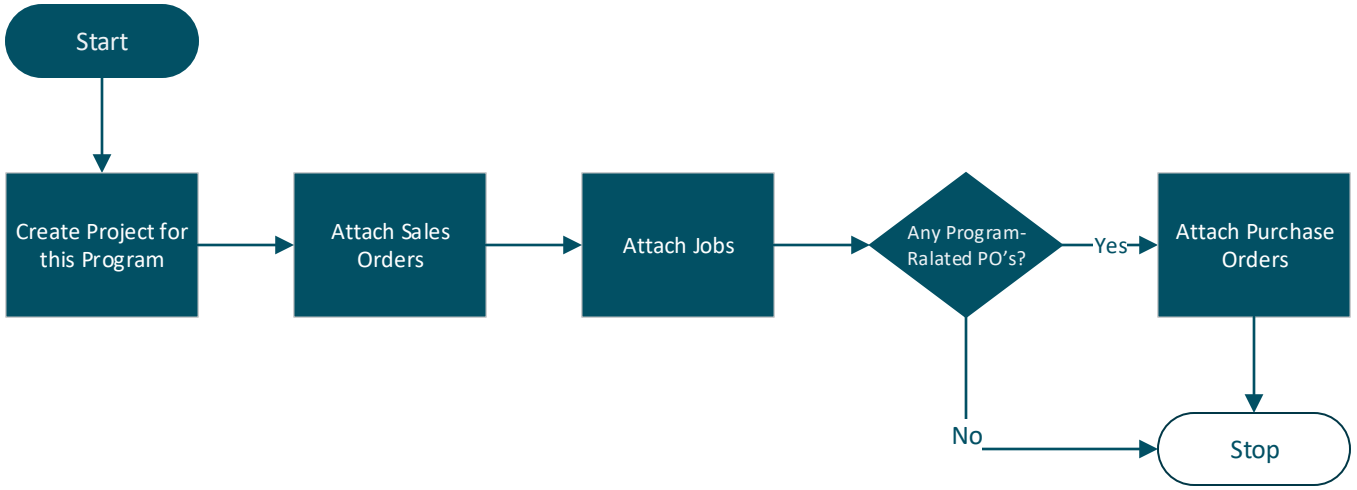
Role Assignment:
- AR Entry

License Requirements: Project Management

STAGE: Create AR Invoice for Project

Role Assignment:
- AR Entry

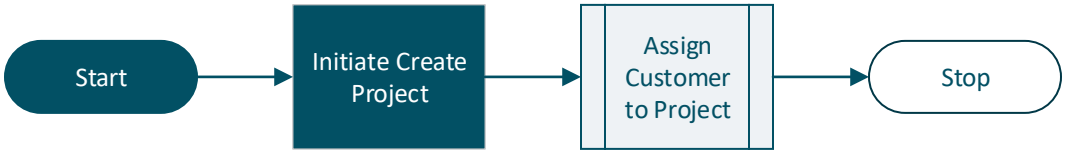
License Requirements: Project Management



Role Assignment:
- Project Manager / Contracts

License Requirements: Project Management

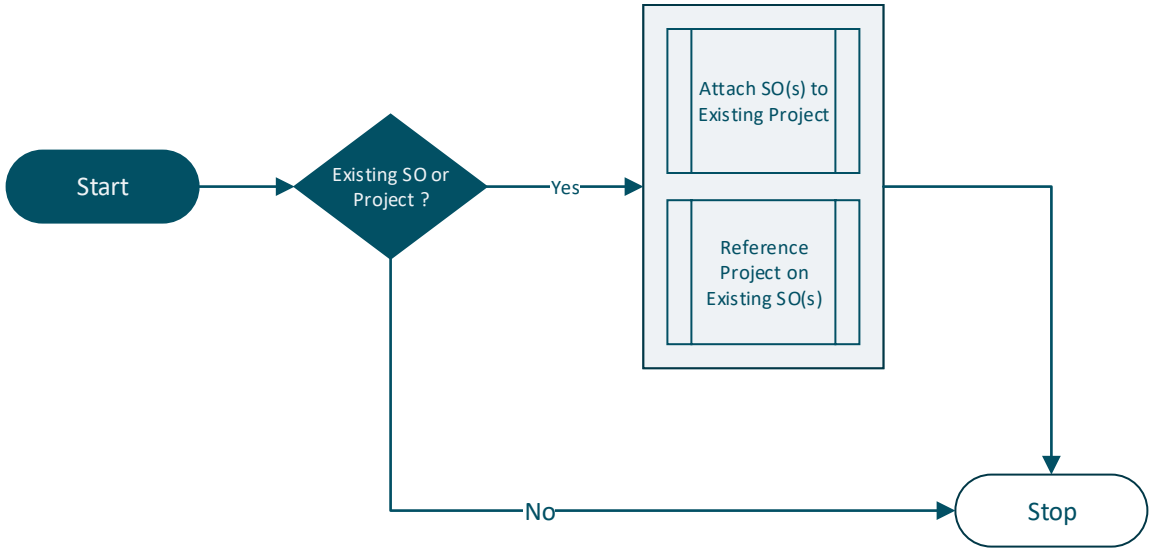
STAGE: Create Project for this Program



Role Assignment:
- Project Manager / Contracts

License Requirements: Project Management

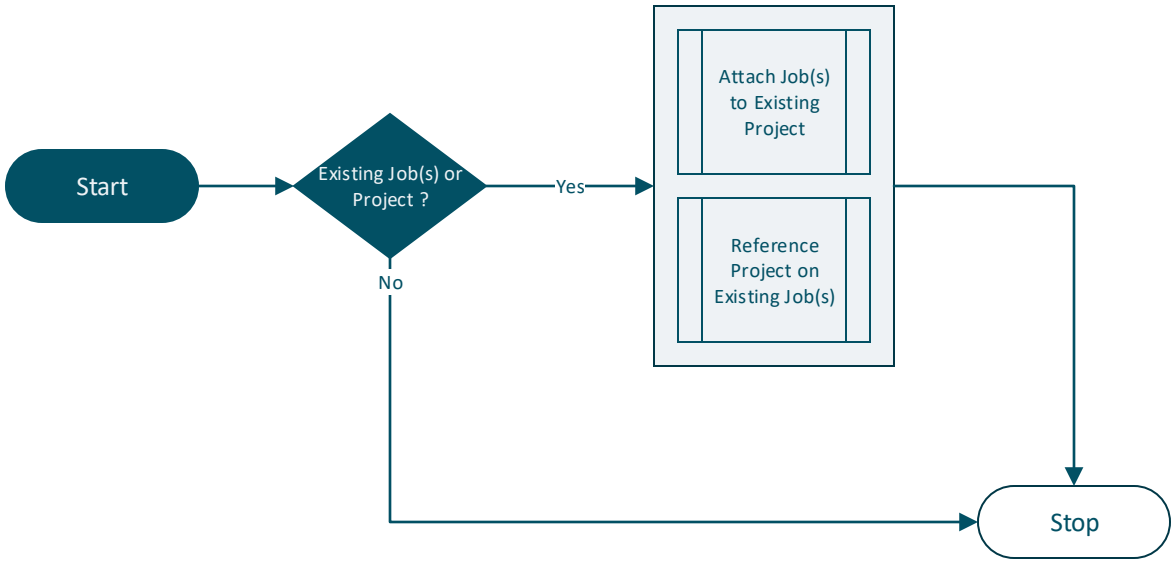
STAGE: Attach Sales Orders



Role Assignment:
- Project Manager / Contracts

License Requirements: Project Management

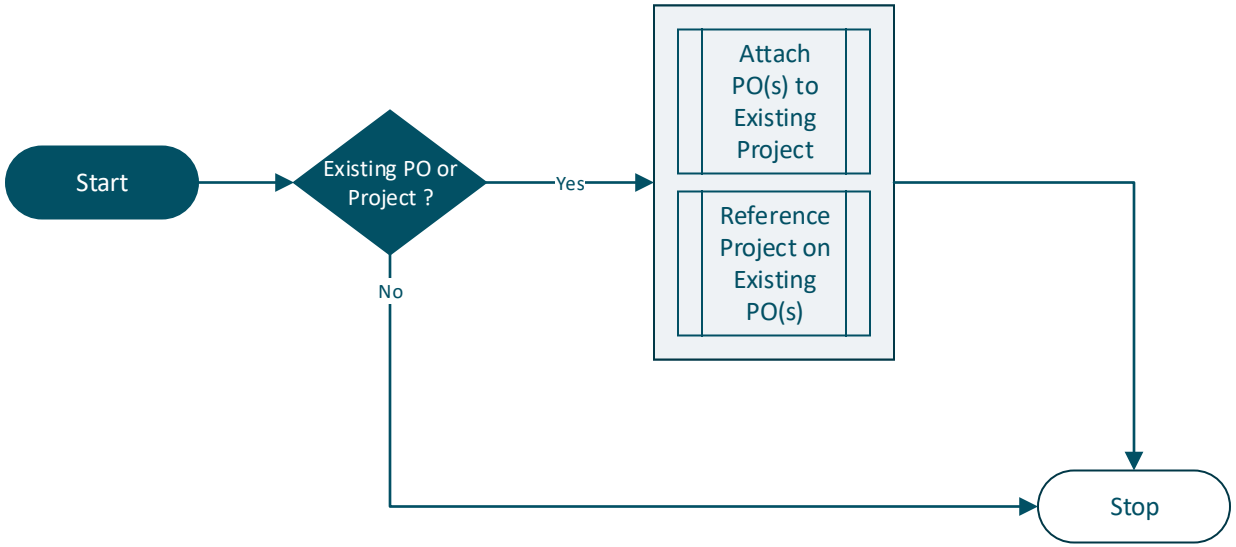
STAGE: Attach Jobs



Role Assignment:
- Project Manager / Contracts

License Requirements: Project Management

STAGE: Attach Purchase Orders



Role Assignment:
- Project Manager / Contracts

License Requirements: Project Management

Purchasing

FUNCTION MENU

CONTRACTS AND PROJECTS MENU

Supplier Quotes

Purchase Orders

PO Approvals

Reschedule Purchase Orders

Landed Cost and Container Tracking

Create Notification of PO Schedule Change

Process Purchase Suggestions

Supplier Qual-ifications

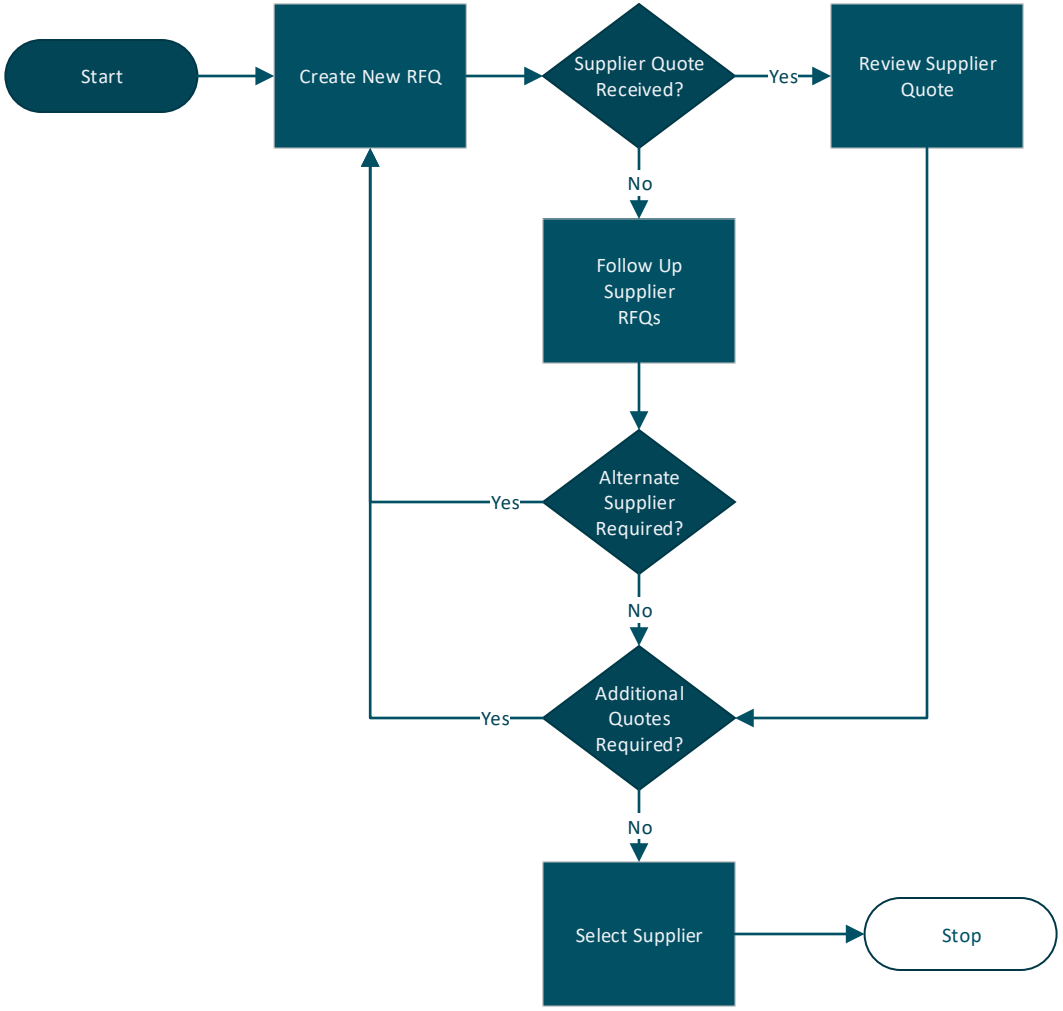
Purchase Requisitions

Purchasing Setup

Create New Supplier

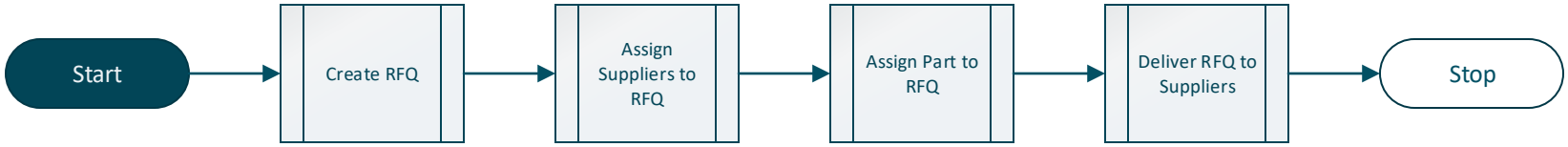
Landed Cost Entry

Create Buyer



Role Assignment:
- Purchasing Agent, Purchasing Manager, Supplier

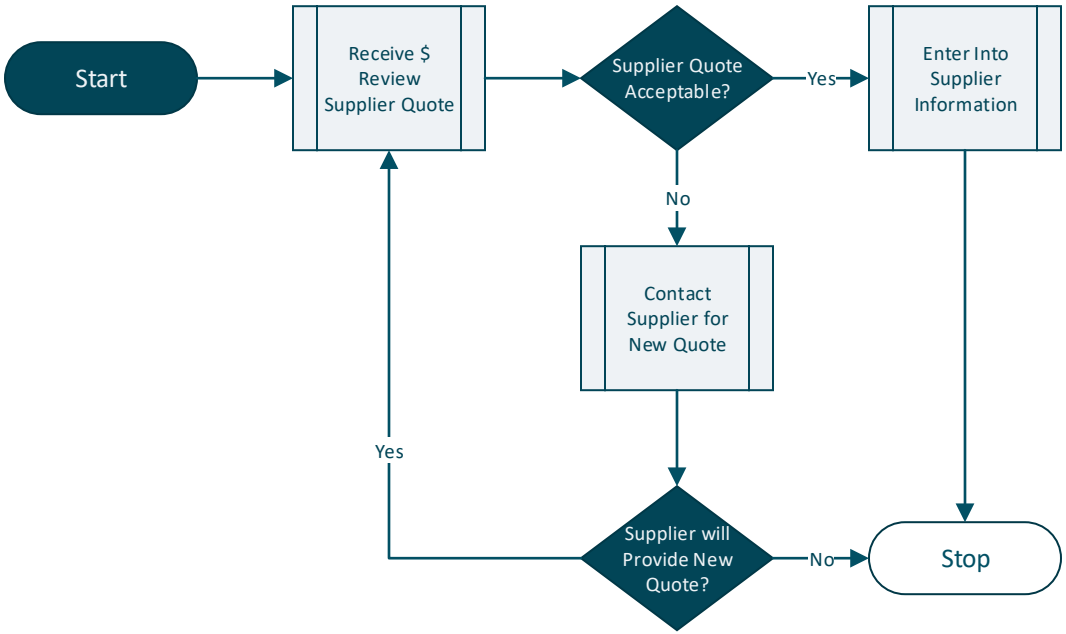
License Requirements:



Role Assignment:
- Purchasing Agent, Purchasing Manager, Supplier

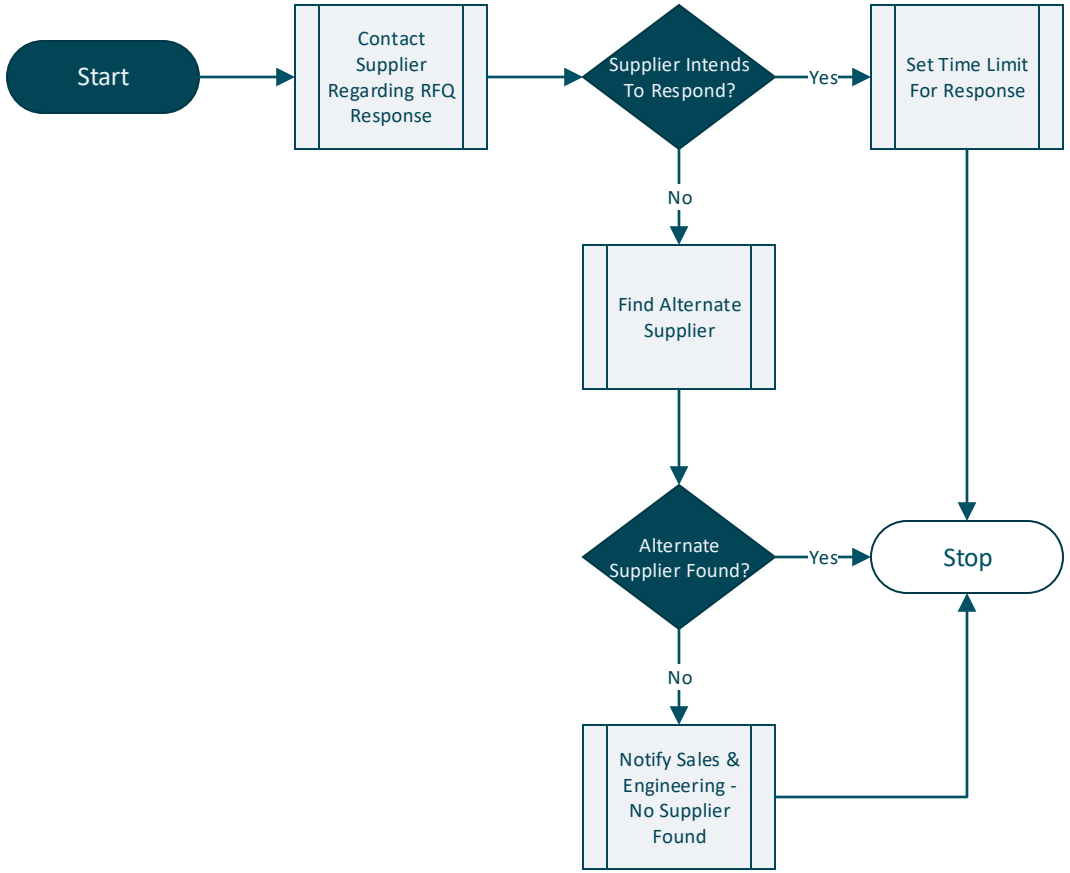
License Requirements:

STAGE: Review Supplier Quote



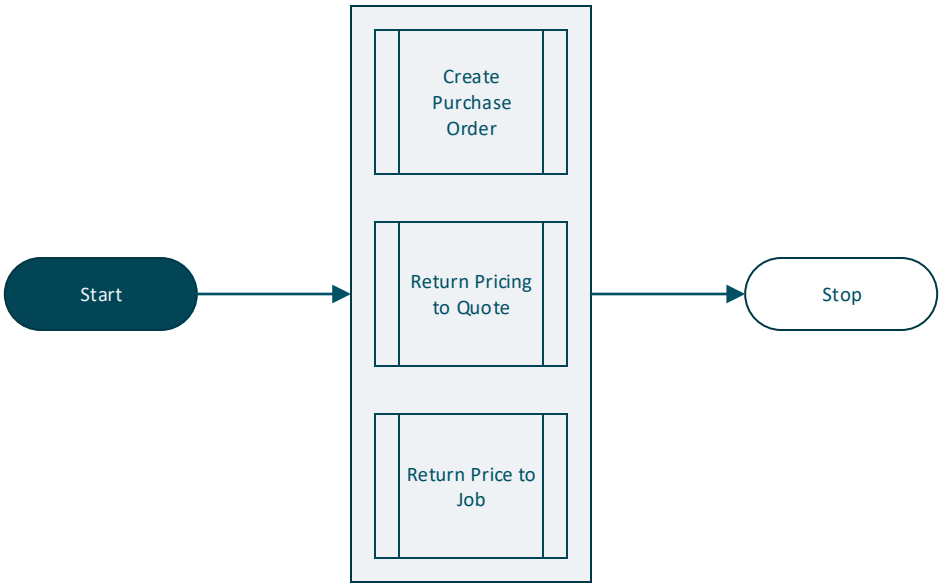
Role Assignment:
- Purchasing

License Requirements:



Role Assignment:
- Purchasing

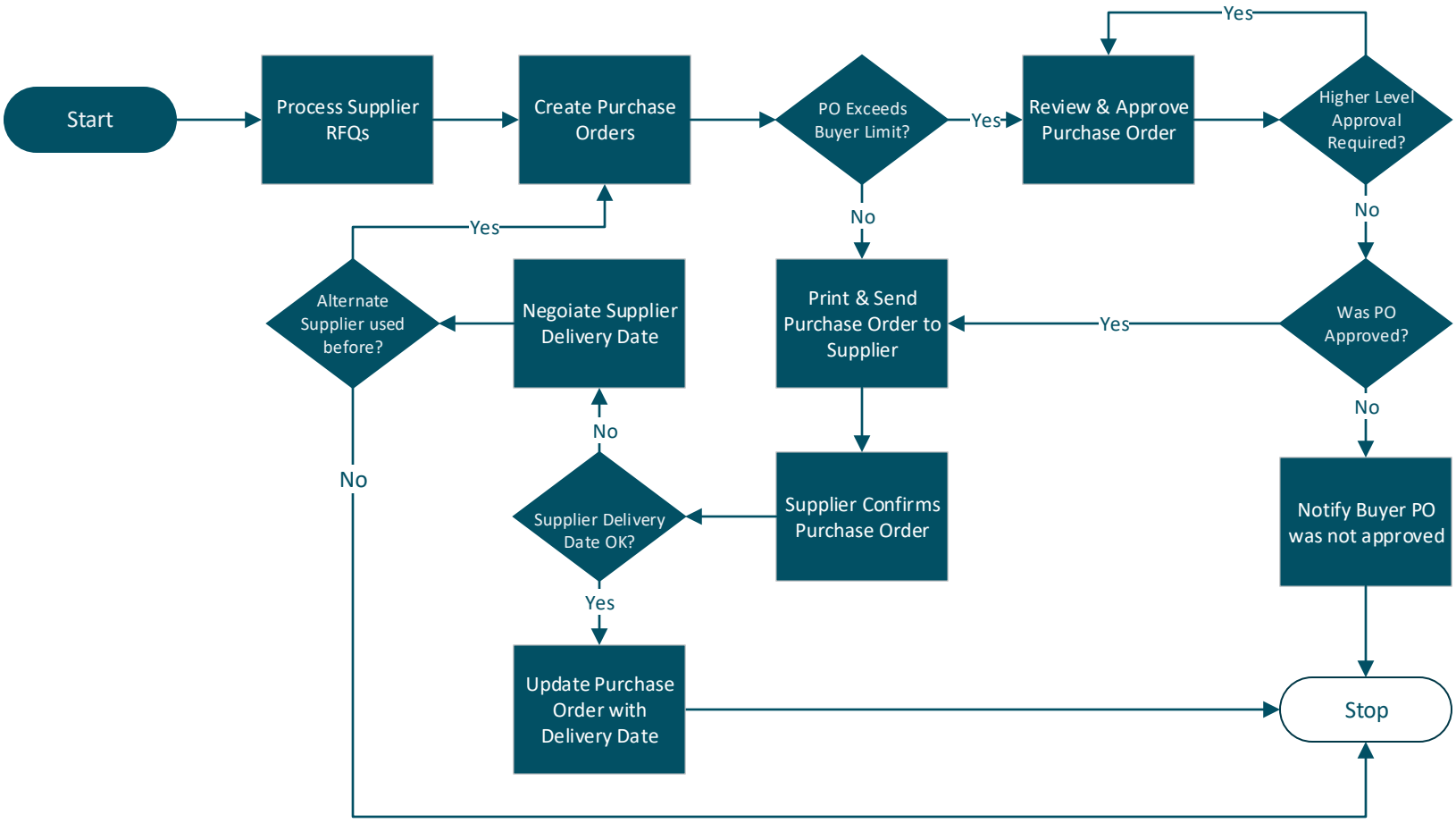
License Requirements:



Role Assignment:
- Purchasing

Notes: System automatically returns pricing to Quote and Job and flags RFQ status as Accepted in Quote and Job Entry

License Requirements:



Role Assignment:
- Purchasing Agent, Purchasing Manager, Supplier

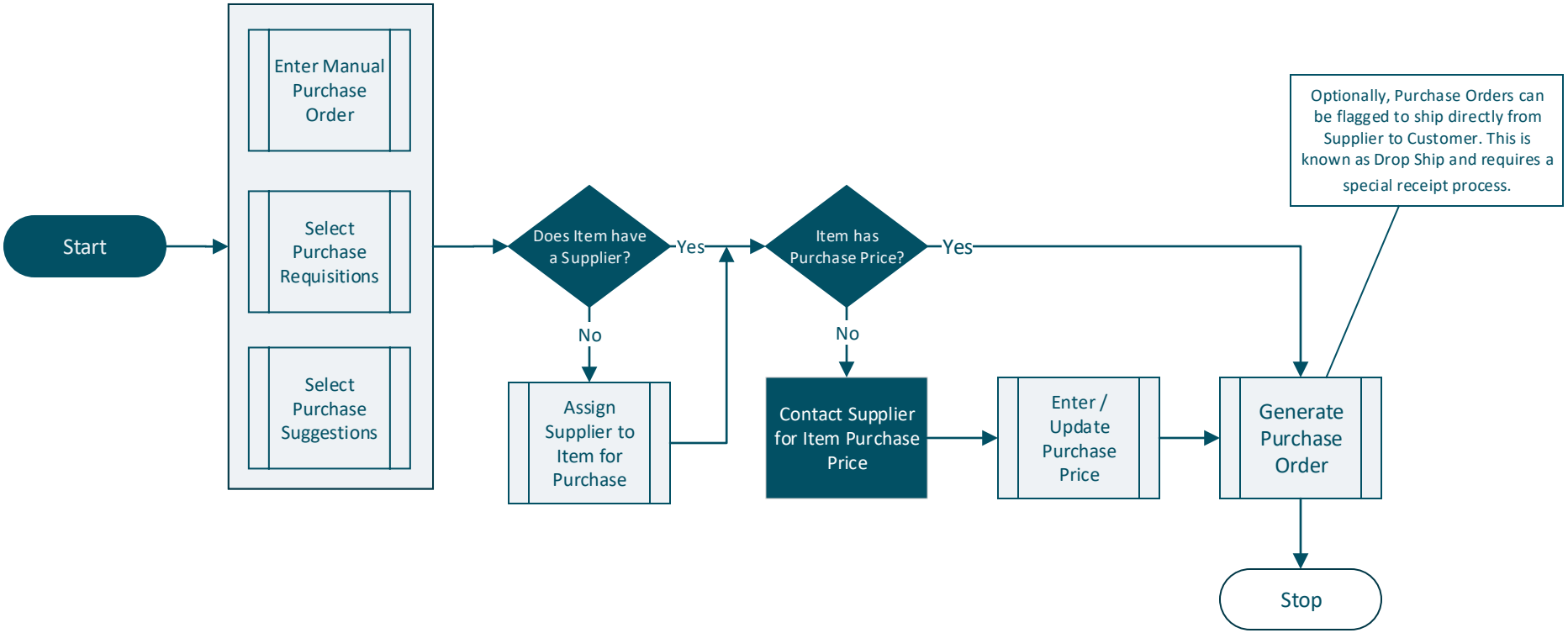
License Requirements:

STAGE: Process Supplier RFQ's

Role Assignment:
- Purchasing

License Requirements:

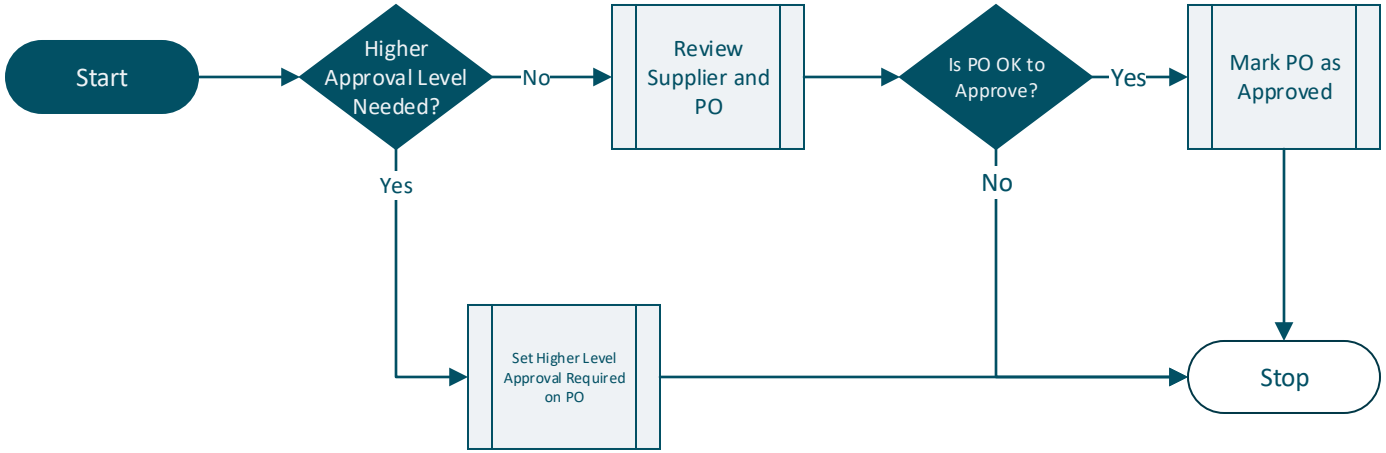
STAGE: Create Purchase Orders



Role Assignment:
- Purchasing Agent / Buyer

License Requirements:

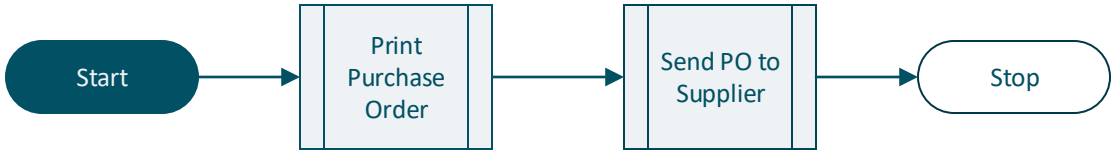
STAGE: Review and Approve PO



Role Assignment:
- Purchasing Manager, Purchasing Agent / Buyer

License Requirements:

STAGE: Print and Send PO to Supplier



Role Assignment:
- Purchasing Agent / Buyer

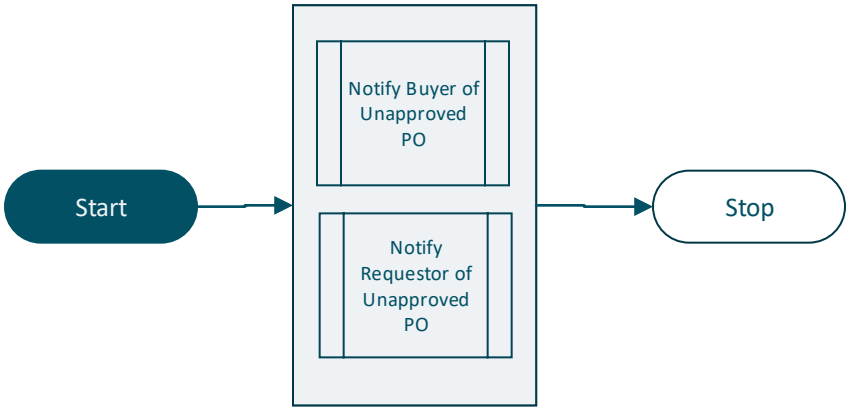
License Requirements:

STAGE: Supplier Confirms PO

Role Assignment:
- Supplier

License Requirements:

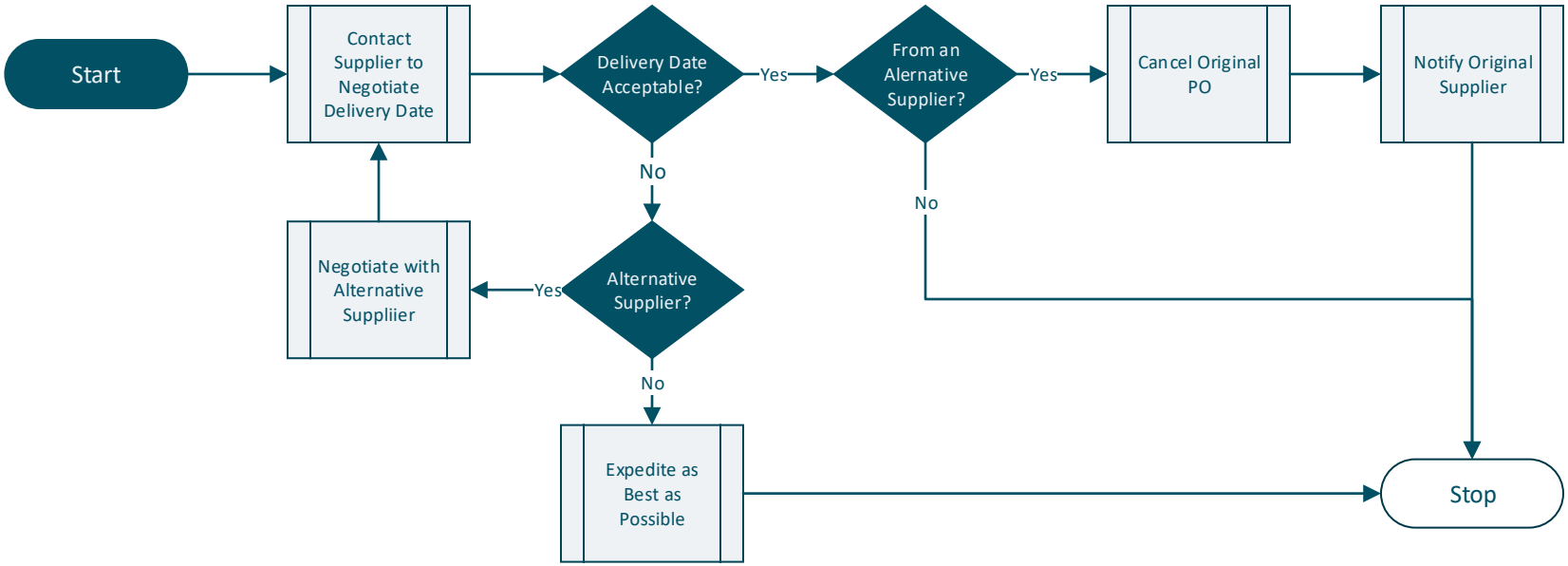
STAGE: Notify Buyer of Unapproved PO



Role Assignment:
- Purchasing

License Requirements:

STAGE: Negotiate Supplier Delivery Date



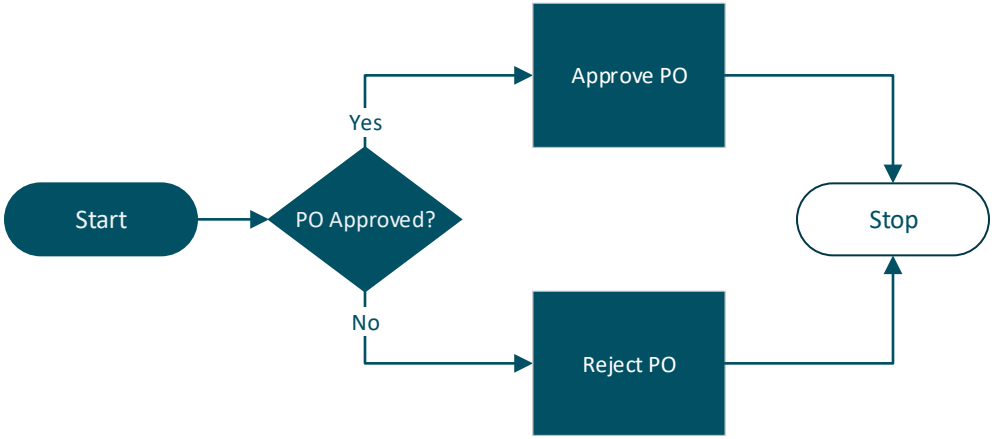
Role Assignment:
- Purchasing Agent / Buyer, Supplier

License Requirements:

STAGE: Update PO with Delivery Date

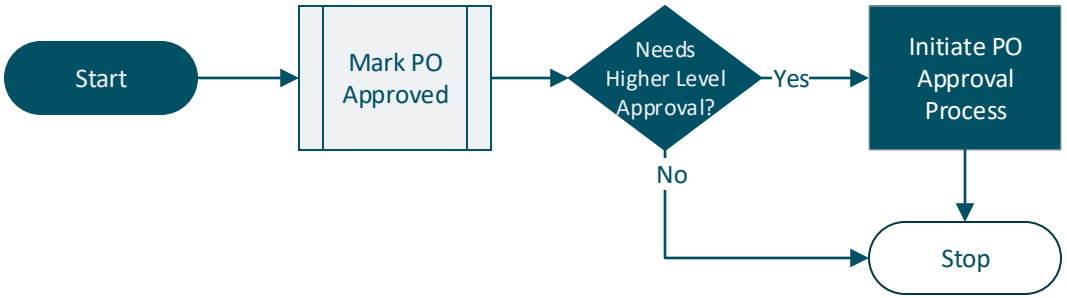
Role Assignment:
- Purchasing Agent / Buyer

License Requirements:



Role Assignment:
- Purchasing Manager, Purchasing Agent / Buyer

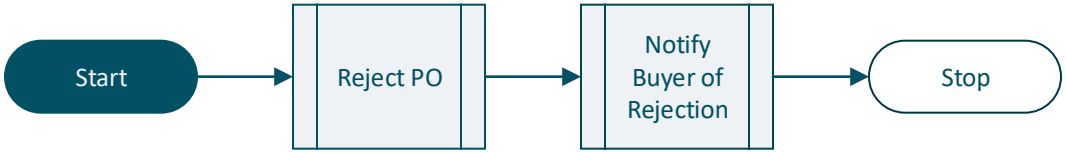
License Requirements:



Role Assignment:
- Purchasing Agent / Buyer, Purchasing Manager

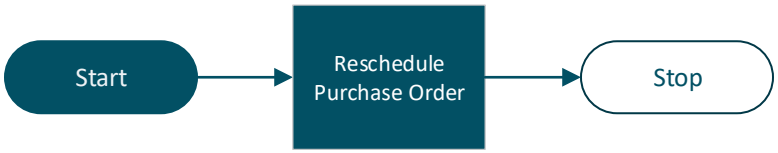
License Requirements:

STAGE: Reject PO



Role Assignment:
- Purchasing Manager

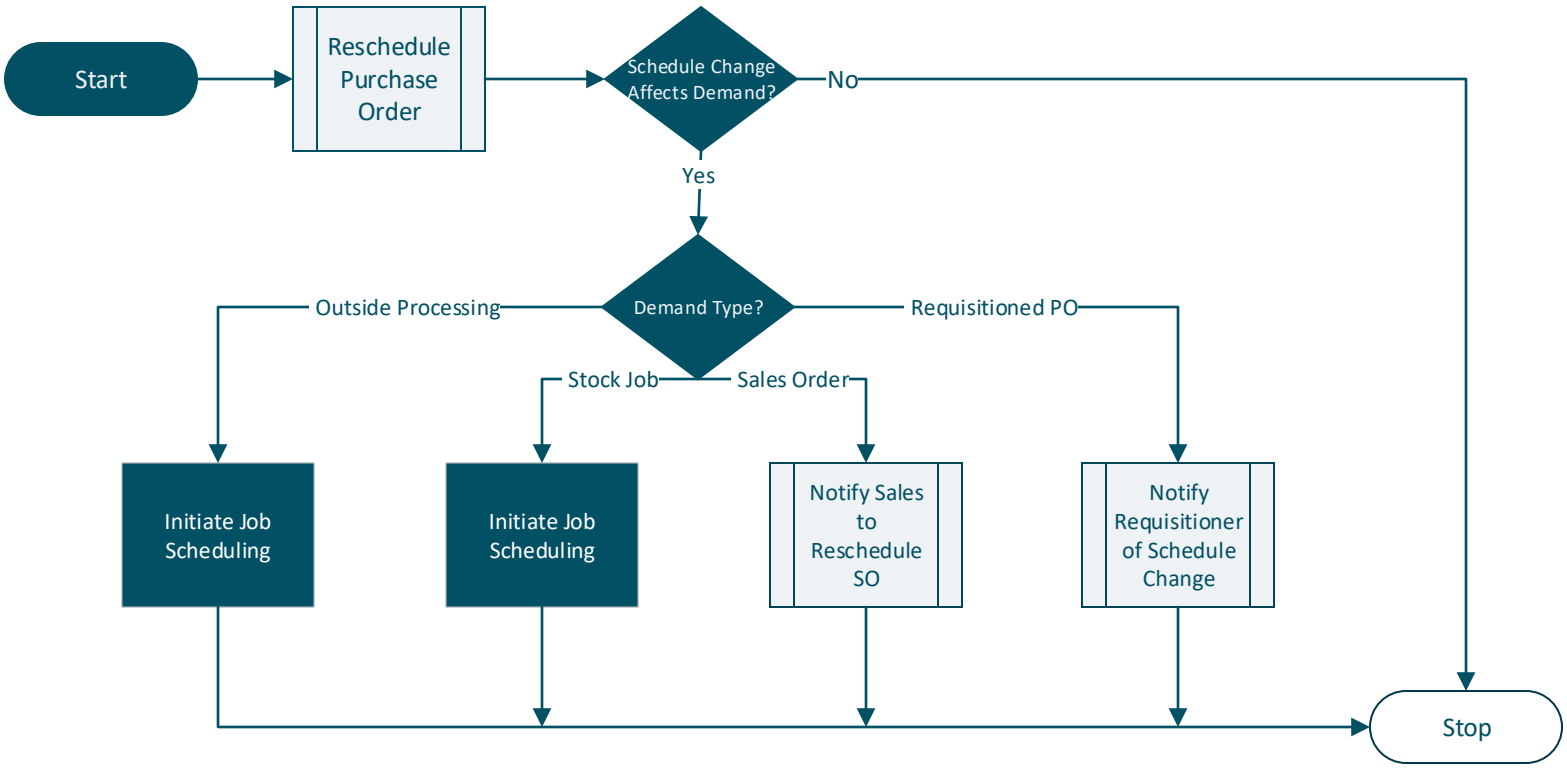
License Requirements:



Role Assignment:
- Supplier

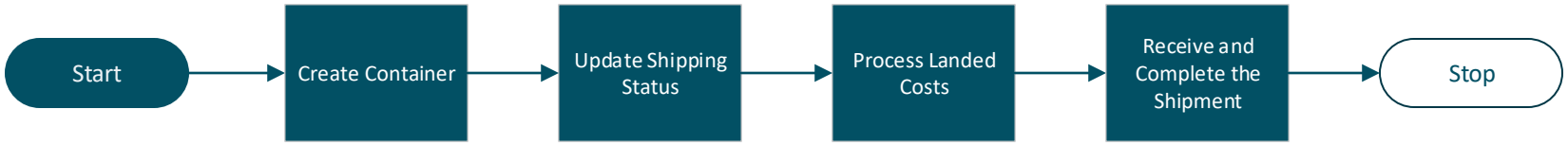
License Requirements:

STAGE: Reschedule Purchase Order



Role Assignment:
- Purchasing

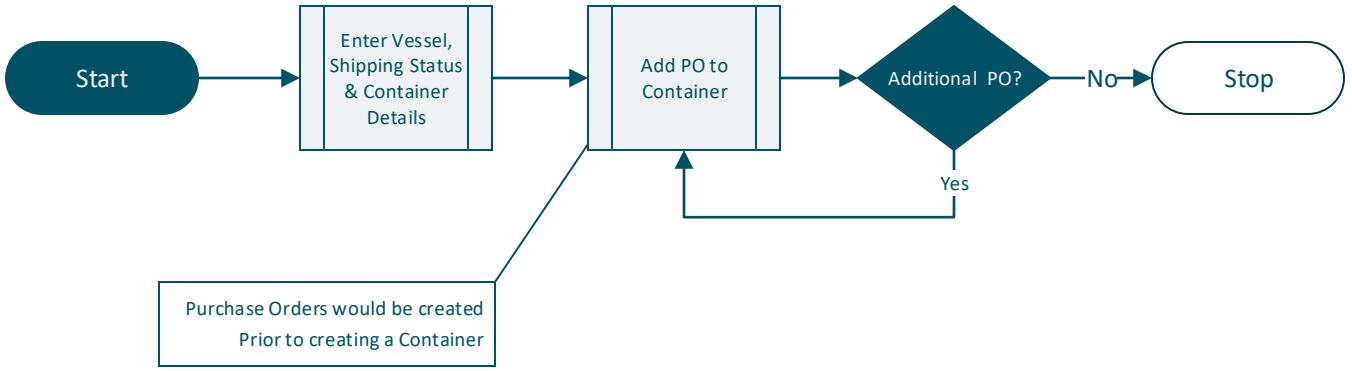
License Requirements:



Role Assignment:
- Purchasing

License Requirements: Landed Cost Management

STAGE: Create Container



Role Assignment:
- Purchasing

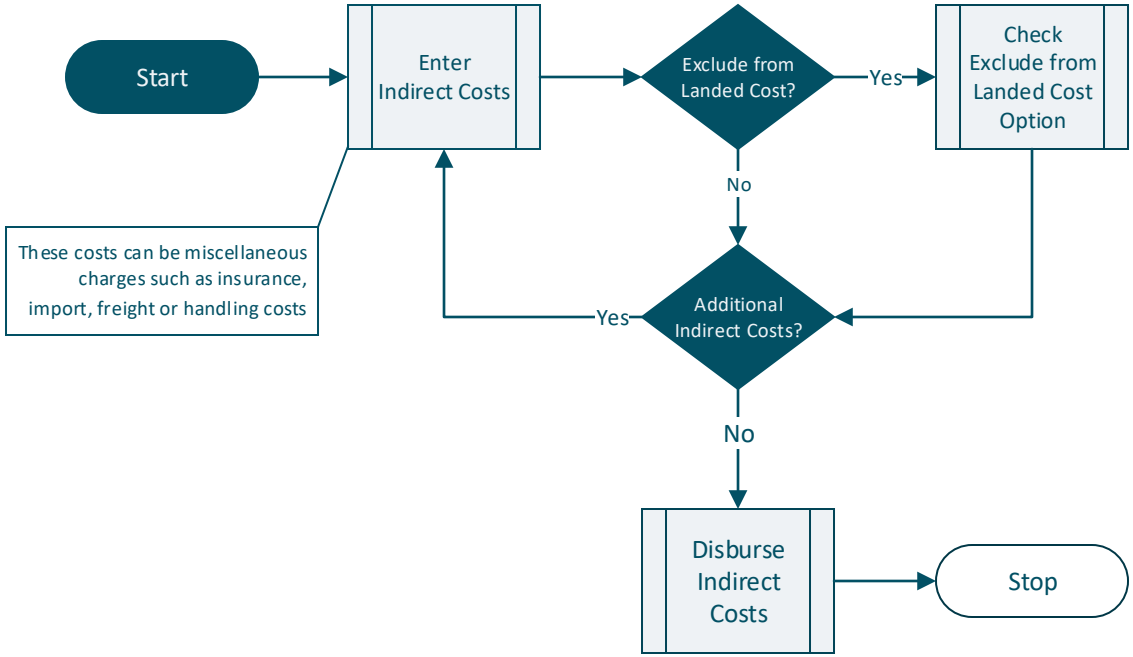
License Requirements:: Landed Cost Management

STAGE: Update Shipping Status

Role Assignment:
- Purchasing

License Requirements:: Landed Cost Management

STAGE: Process Landed Costs



Role Assignment:
- AP Entry

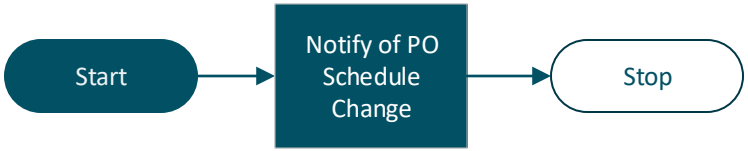
License Requirements:: Landed Cost Management

STAGE: Receive and Complete the Shipment

Role Assignment:
- Shipping and Receiving

License Requirements:: Landed Cost Management

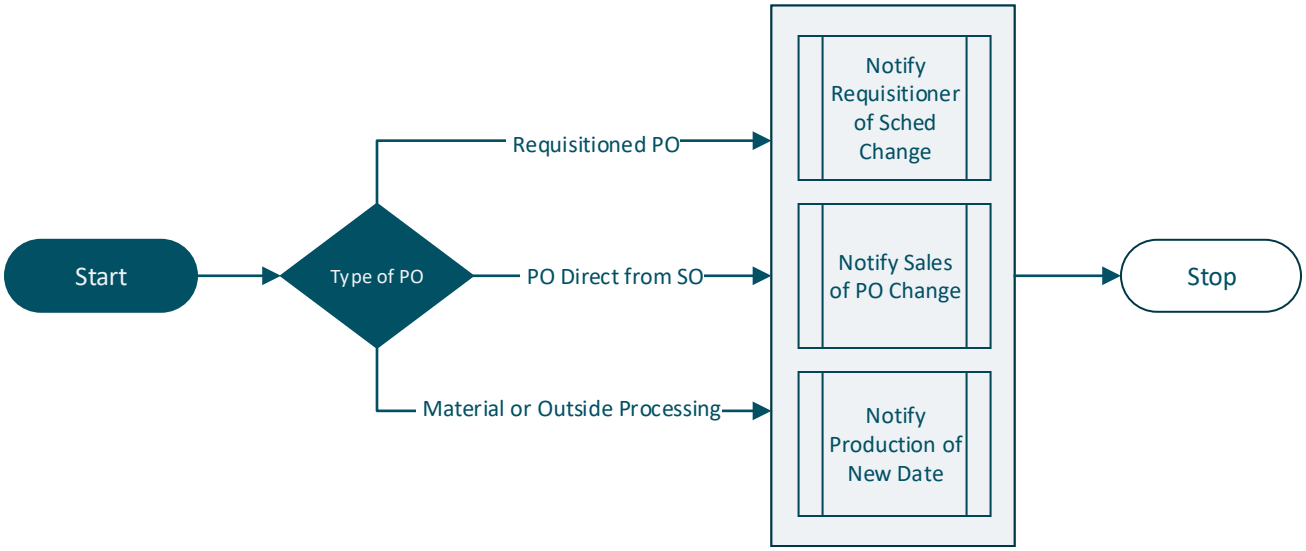
PROCESS: Notify of PO Schedule Change



Role Assignment:
- Purchasing

License Requirements::

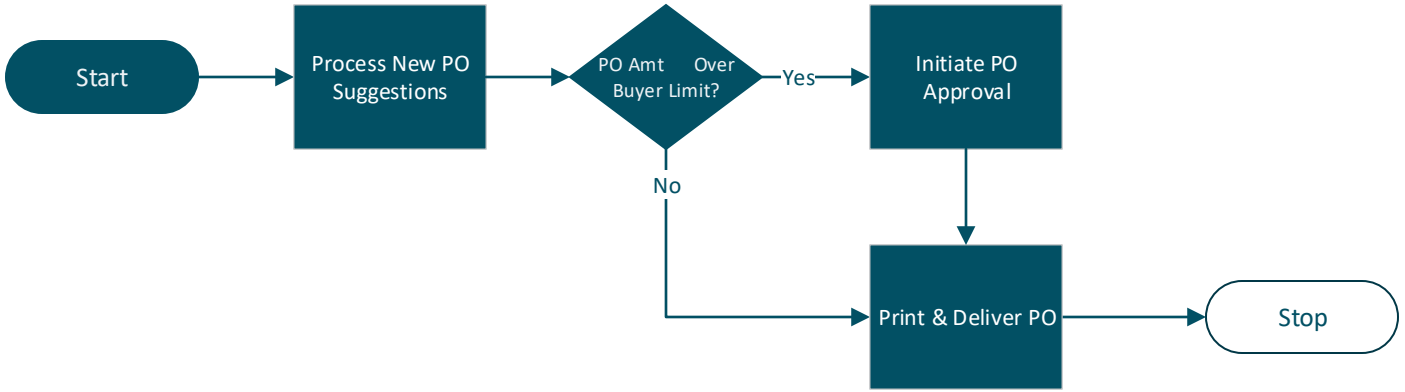
STAGE: Notify of PO Schedule Change



Role Assignment:
- Purchasing

License Requirements:

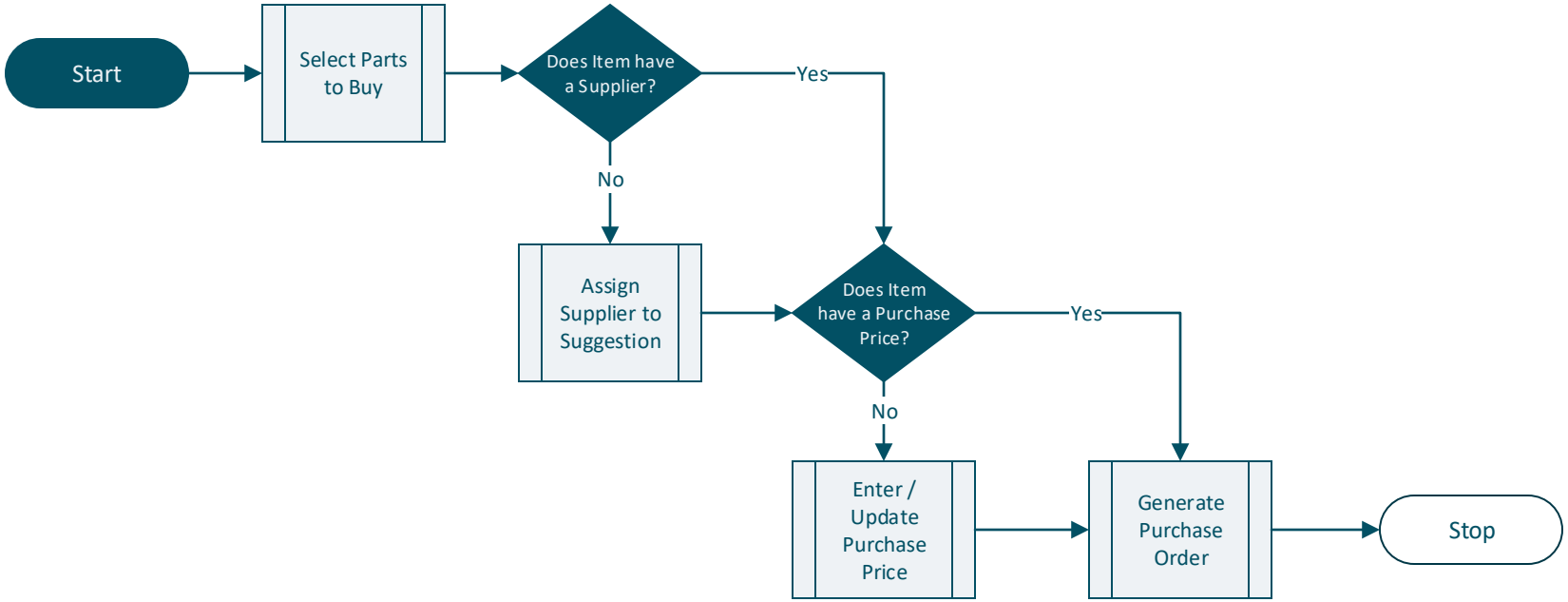
PROCESS: Process Purchasing Suggestions



Role Assignment:
- Purchasing

License Requirements:

STAGE: Process New PO Suggestions



Role Assignment:
- Purchasing

License Requirements:

STAGE: Initiate PO Approval

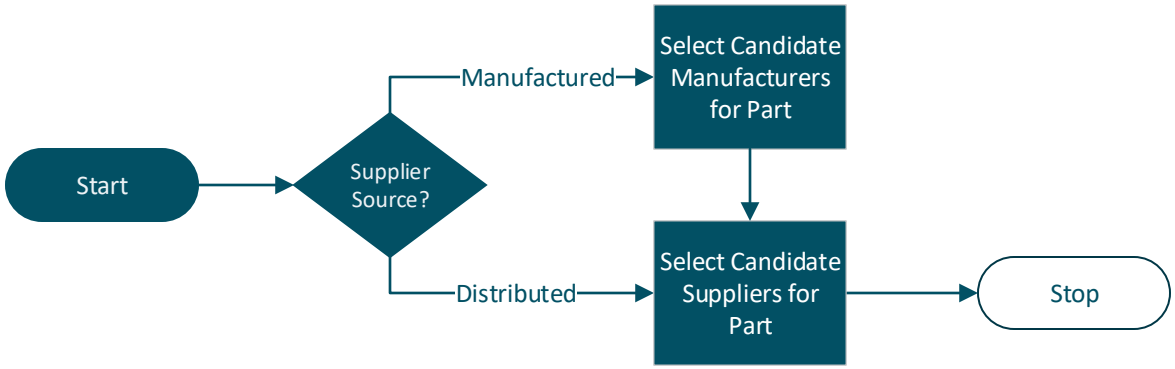
Role Assignment:
- Purchasing

License Requirements:

STAGE: Print & Deliver PO

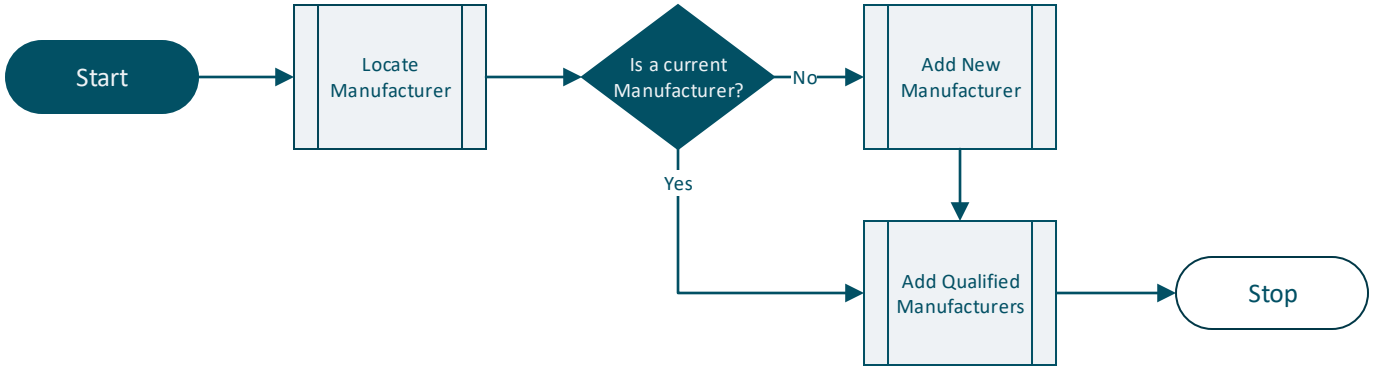
Role Assignment:
- Purchasing

License Requirements:



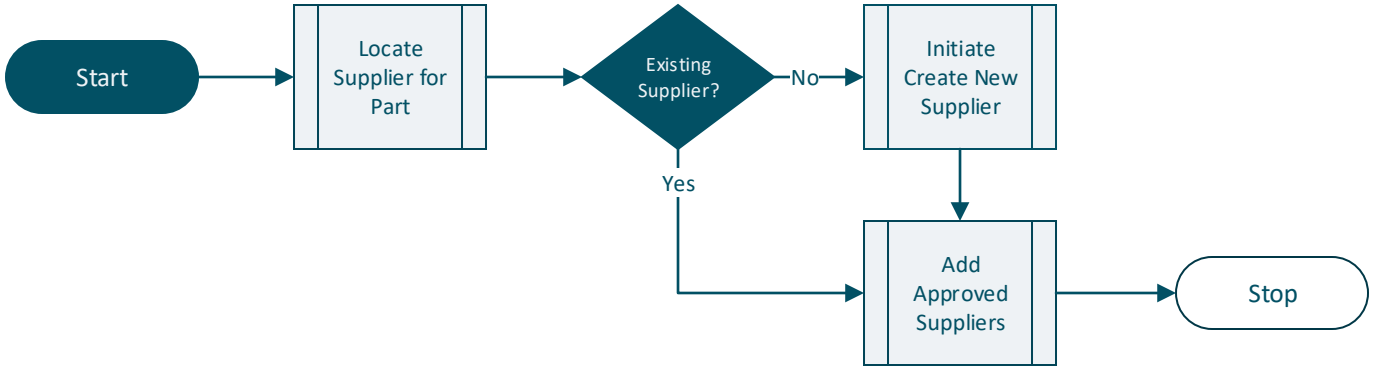
Role Assignment:
- Engineering

License Requirements:



Role Assignment:
- Purchasing

License Requirements:



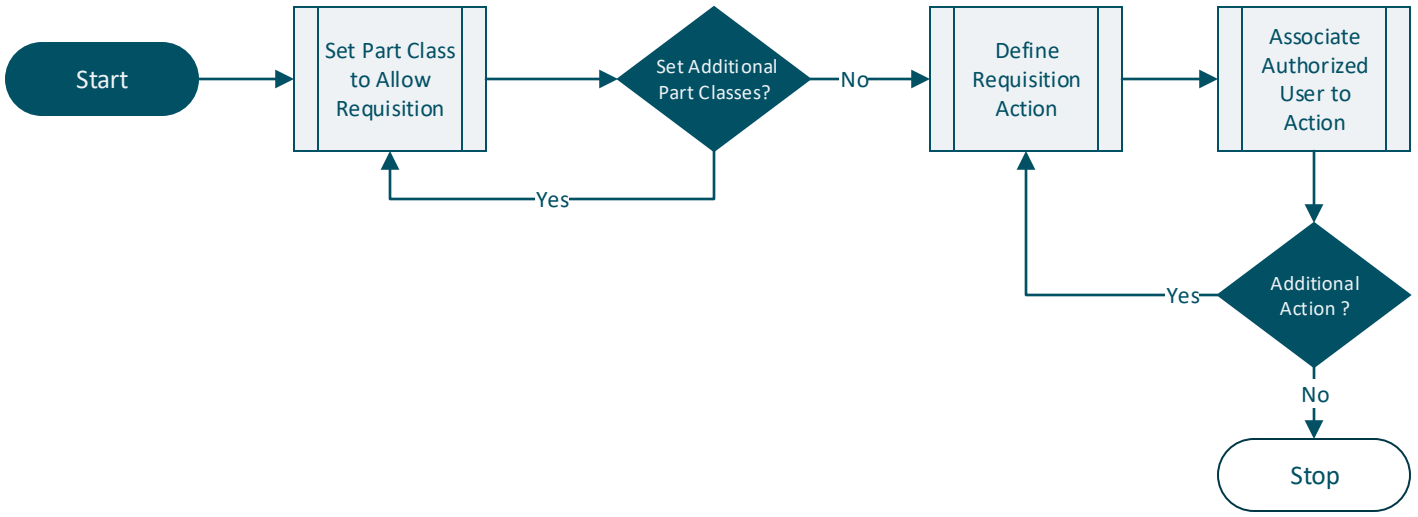
Role Assignment:
- Purchasing

License Requirements:

PROCESS: Purchase Requisitions

Role Assignment:
- Purchasing, Shipping & Receiving, All authorized Users & Supervisors

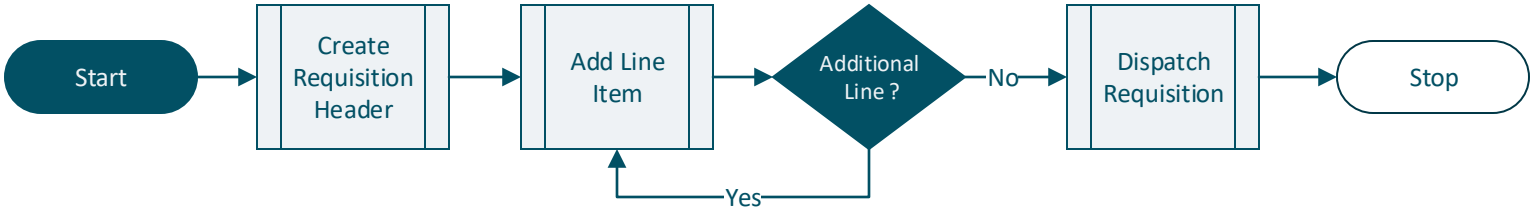
License Requirements:



Role Assignment:
- Purchasing Manager

License Requirements:

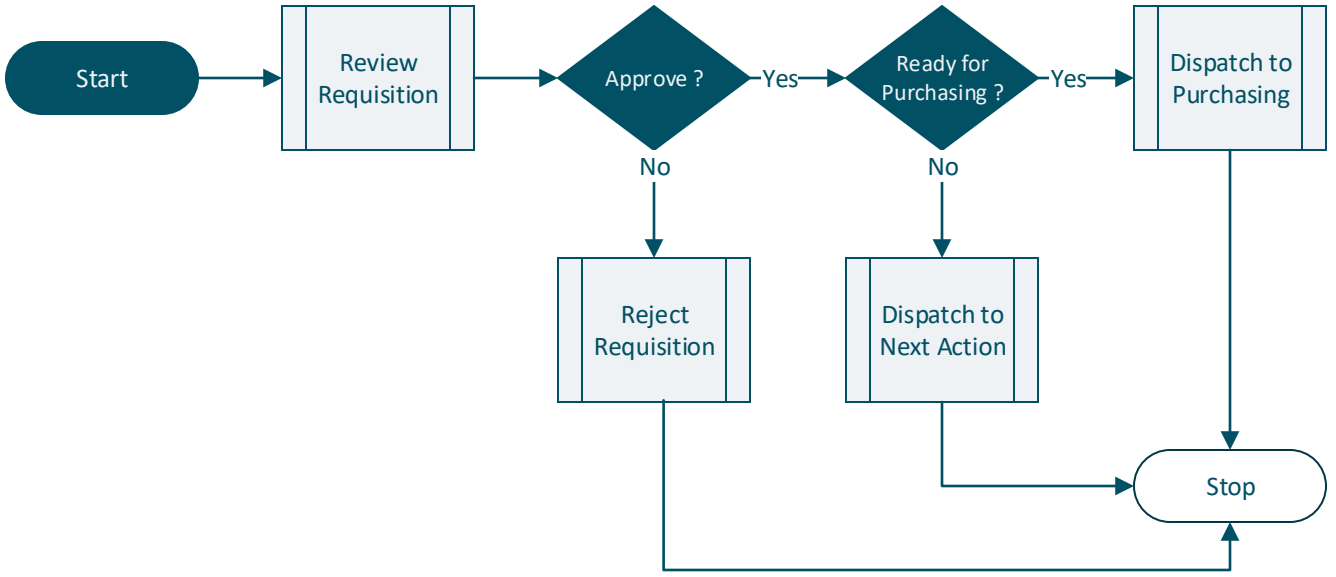
STAGE: Create Requisition



Role Assignment:
- All Authorized User Accounts

License Requirements:

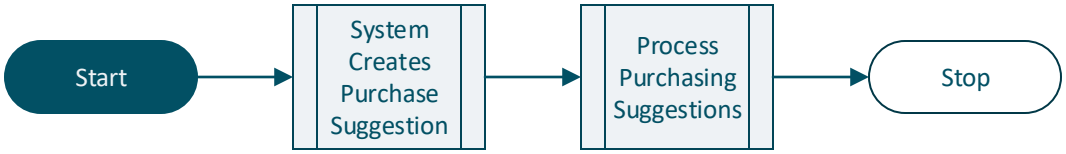
STAGE: Approve Requisition Action



Role Assignment:
- Authorized Supervisors / Approved Users

License Requirements:

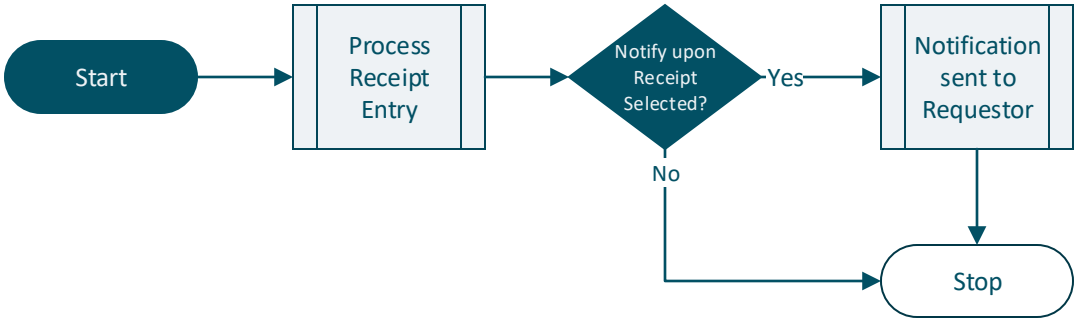
STAGE: Purchasing Buys for Requisition



Role Assignment:
- Purchasing

License Requirements:

STAGE: Receive Requisition



Role Assignment:
- Shipping and Receiving

License Requirements:

Role Assignment:
- Purchasing Manager, Inventory Control, Accounts Payable

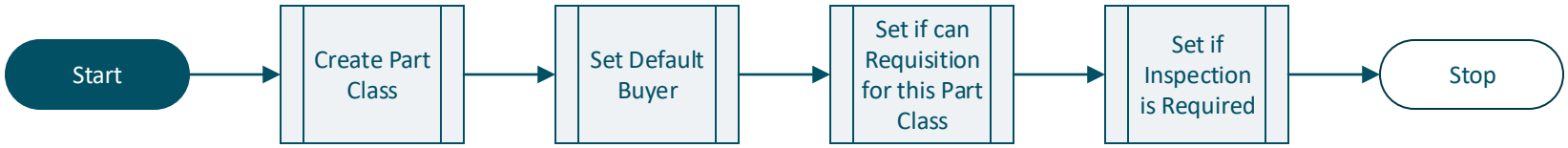
License Requirements:

Role Assignment:
- Purchasing Manager

NOTES: A Buyer can be a person or a Role. For instance, “Jane Doe” or “Commodity Purchase Agent”, One buyer should be flagged as the default to assure all Purchase Suggestions are seen, The default purchase dollar limit of $0.00 means there is no dollar limit for the buyer

License Requirements:

STAGE: Setup Part Class



Role Assignment:
- Inventory Control, Purchasing Manager, Accounting Manager

NOTE: Part Classes impact the General Ledger. So setup of the GL control should be coordinated with the Accounting Manager
Part Classes also control if a warning or hard stop would display if an associated transaction would cause Inventory QOH to go negative

License Requirements:

Role Assignment:
- Accounts Payable

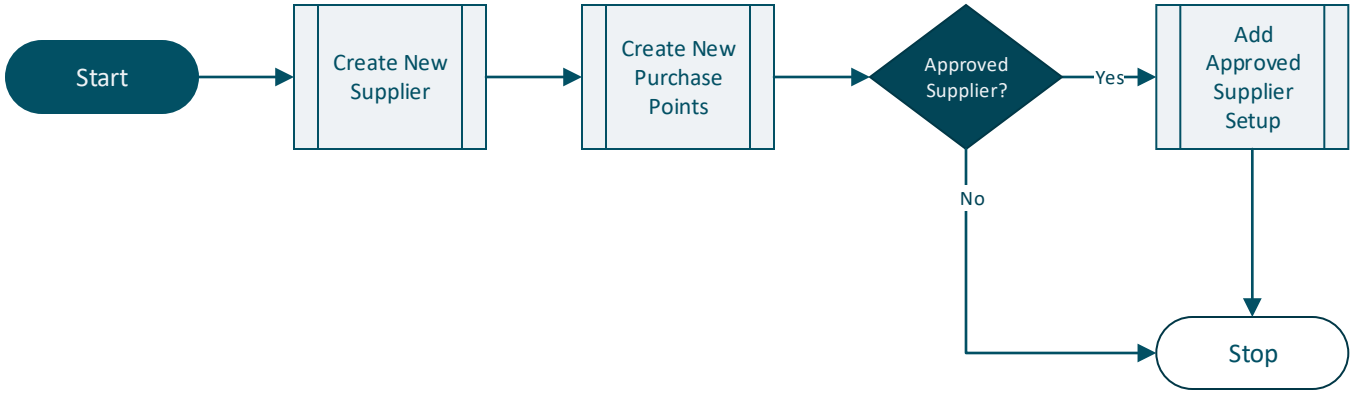
NOTE: Best Practice is to prohibit buyers from creating suppliers to support proper internal controls

License Requirements:

Role Assignment:
- Purchasing / AP Entry / Quality

License Requirements:

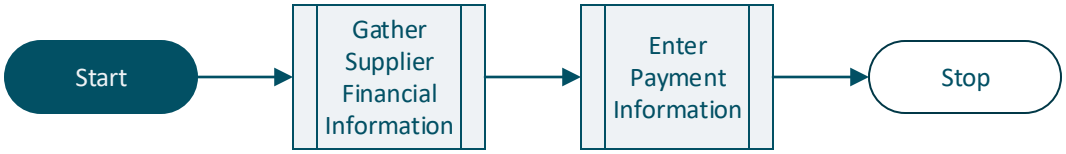
STAGE: Create New Supplier



Role Assignment:
- Purchasing / AP Entry

License Requirements:

STAGE: Finance Setup



Role Assignment:
- Purchasing / AP Entry

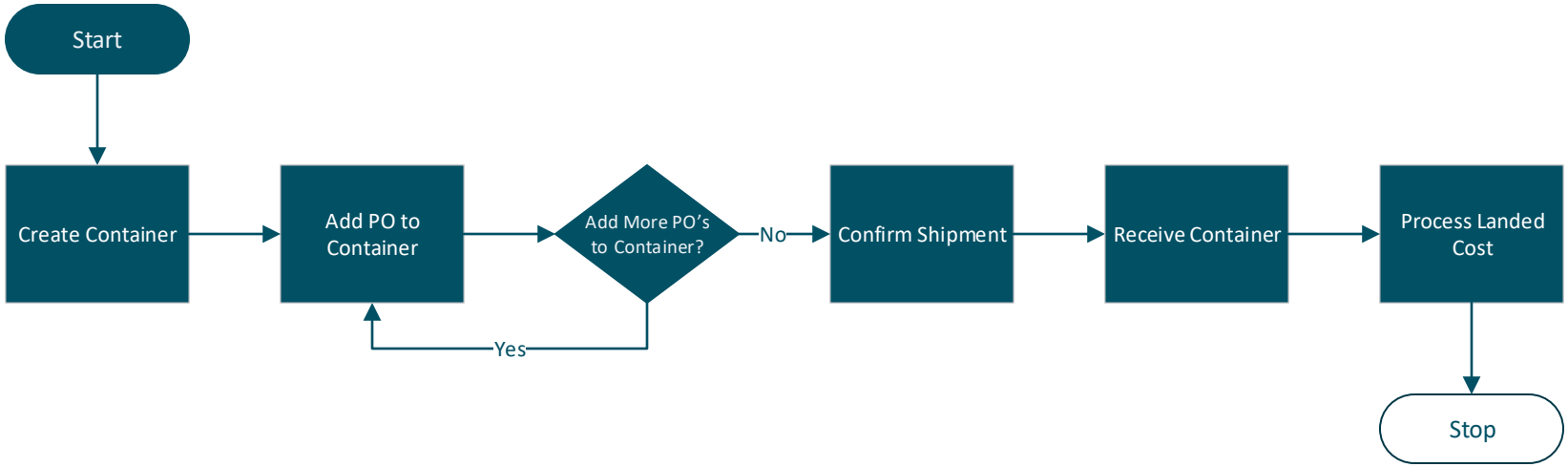
License Requirements:

STAGE: Quality Review

Role Assignment:
- Quality

License Requirements:

PROCESS: Landed Cost Entry



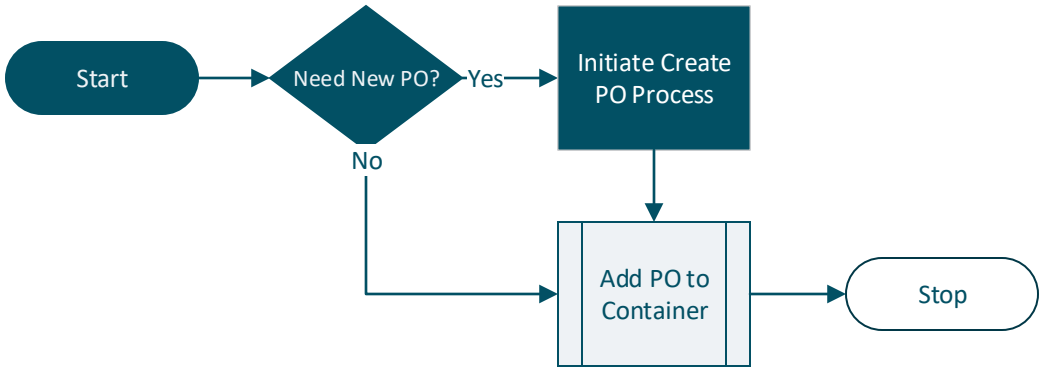
Role Assignment:
- Purchasing Agent, Shipping and Receiving, Accounts Payable

License Requirements:: Landed Cost Management

Role Assignment:
- Purchasing Agent / Buyer

License Requirements:: Landed Cost Management

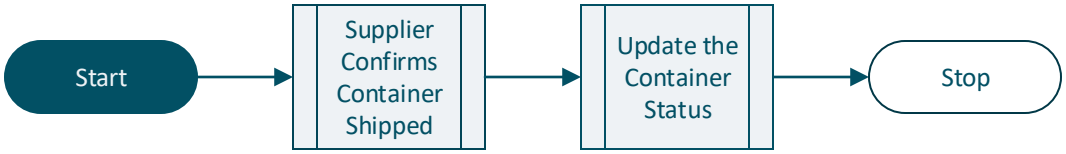
STAGE: Add PO to Container



Role Assignment:
- Purchasing Agent / Buyer

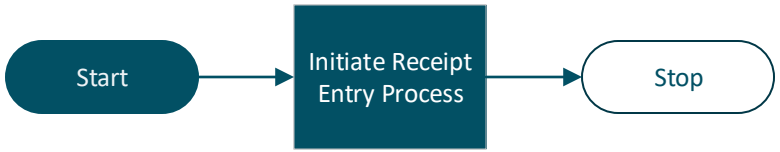
License Requirements:: Landed Cost Management

STAGE: Confirm Shipment



Role Assignment:
- Purchasing Agent / Buyer

License Requirements:: Landed Cost Management



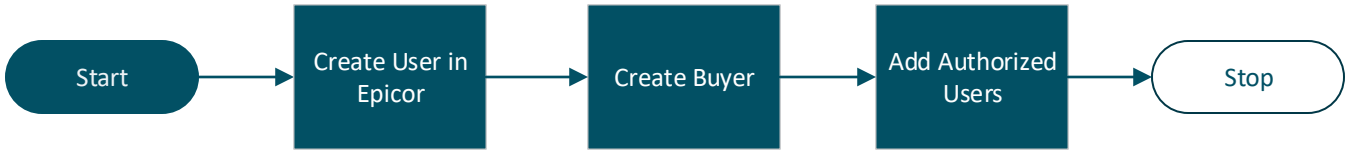
Role Assignment:
- Shipping & Receiving

License Requirements:: Landed Cost Management

Role Assignment:
- Accounts Payable

License Requirements:: Landed Cost Management

PROCESS: Create Buyer



Role Assignment:
- Information Systems

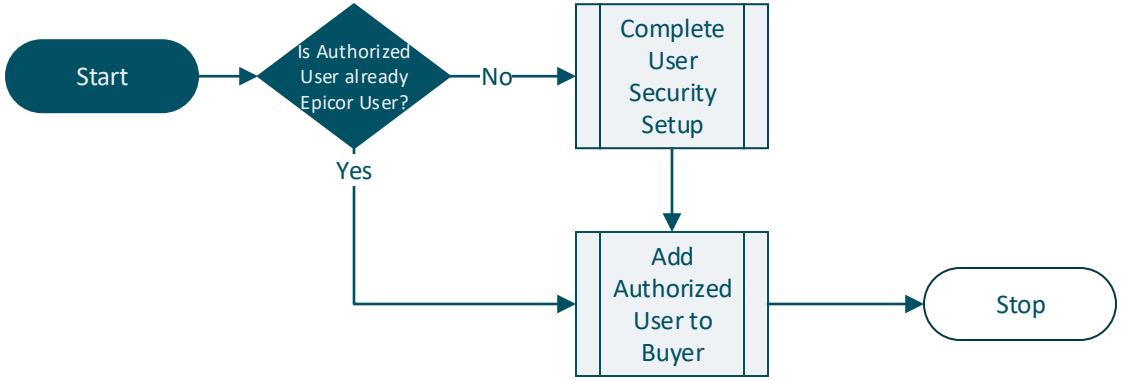
License Requirements:

Role Assignment:
- Information Systems

License Requirements:

Role Assignment:
- Information Systems

License Requirements:



Role Assignment:
- Information Systems

License Requirements:

Inventory

FUNCTION MENU

PURCHASING

New Cycle Count Schedule

Process Physical Counts

Quantity Adjustments

Receive Inventory into Stock

Issue Material to Jobs

Create Transfers (Within or Across Sites)

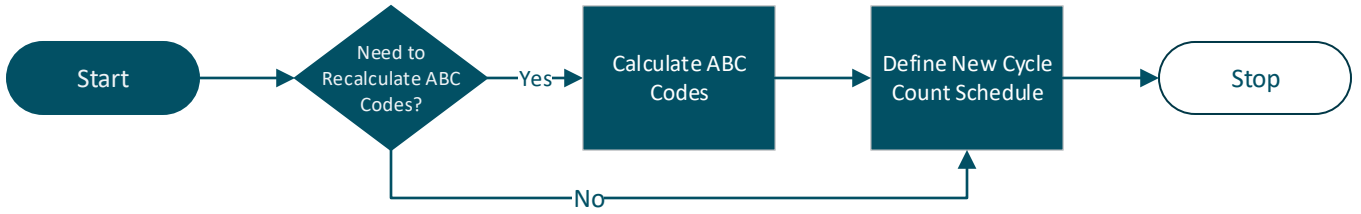
Setup Warehouse and Bin(s)

Supplier Managed Inventory

Customer Managed Inventory

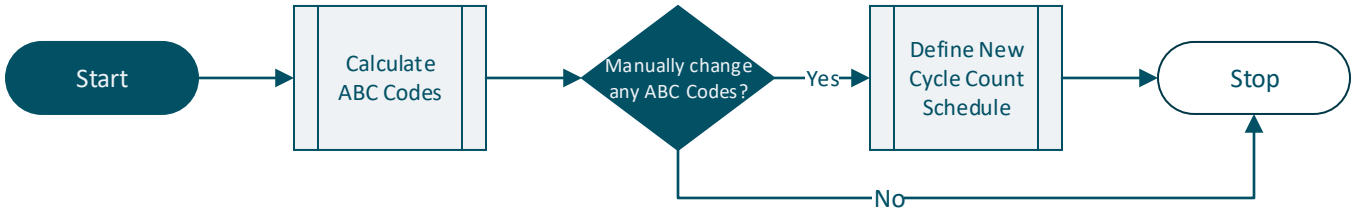
Customer Site Stored Inventory (Consignment)

PROCESS: New Cycle Count Schedule Setup



Role Assignment:
- Inventory Control

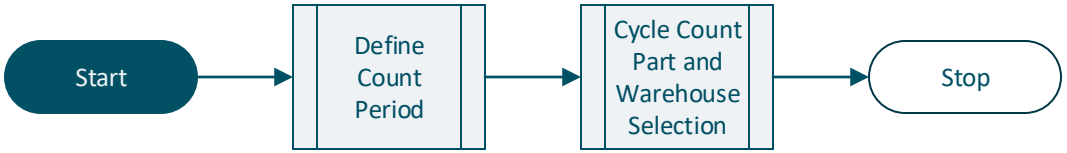
License Requirements:



Role Assignment:
- Inventory Control

License Requirements:

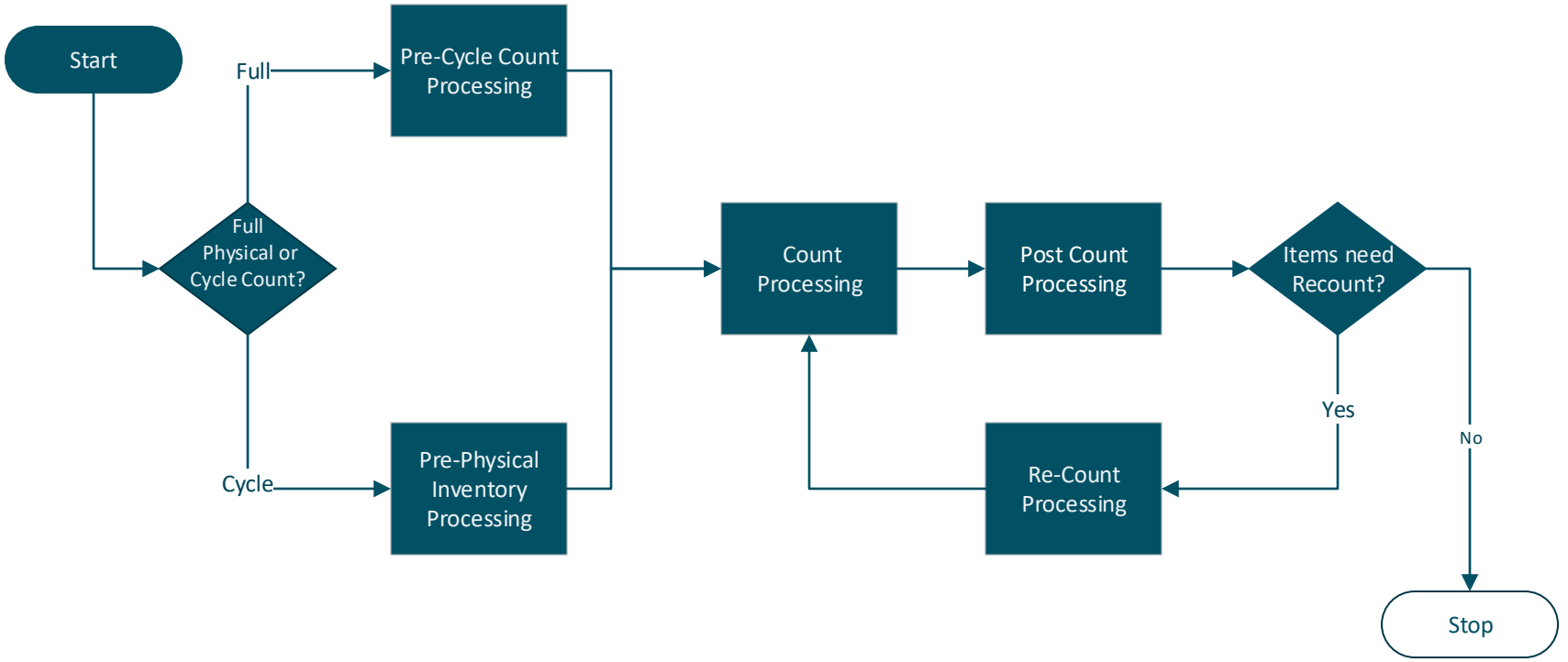
STAGE: Define Cycle Count Schedule



Role Assignment:
- Inventory Control

License Requirements:

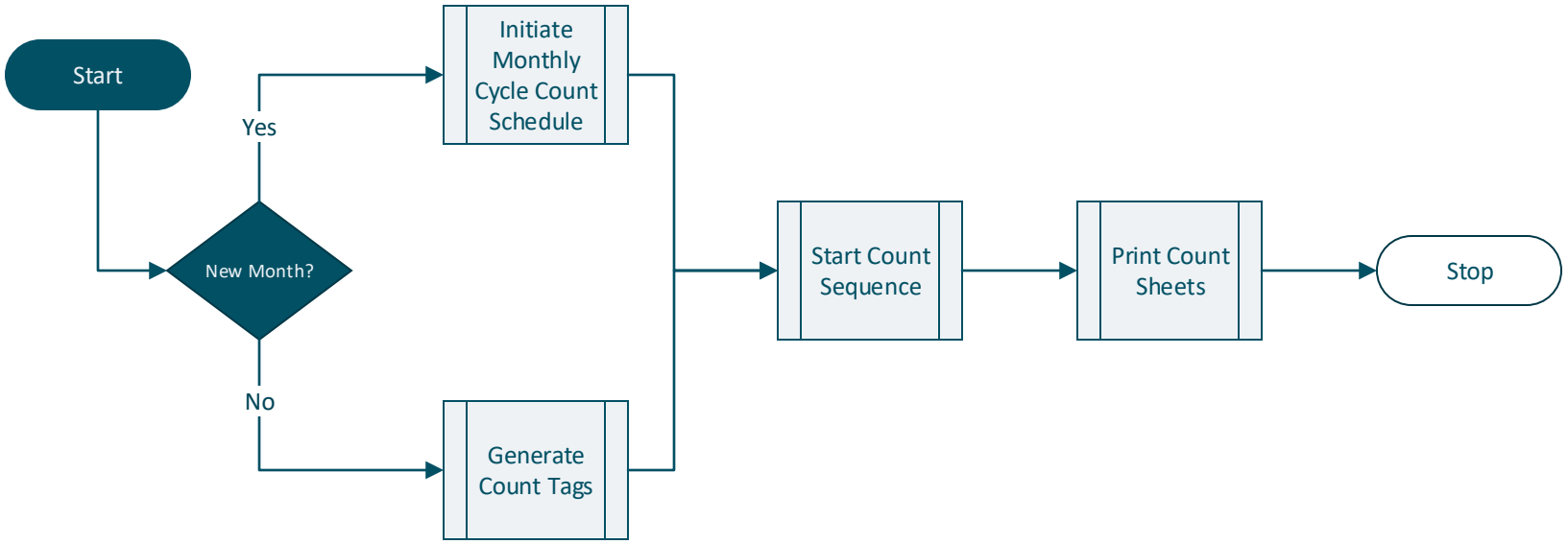
PROCESS: Process Physical Count (Cycle or Full)



Role Assignment:
- Inventory Control

License Requirements:

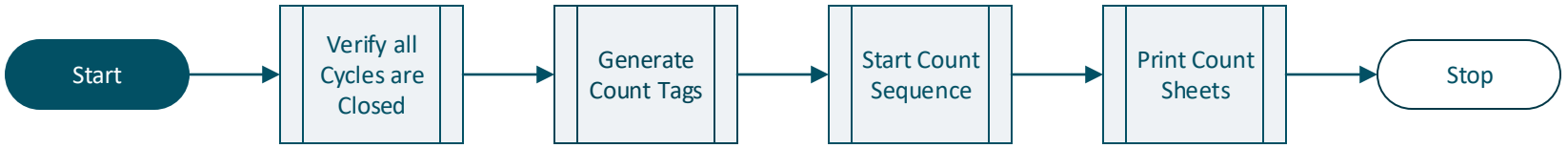
STAGE: Pre-Cycle Count Processing



Role Assignment:
- Inventory Control

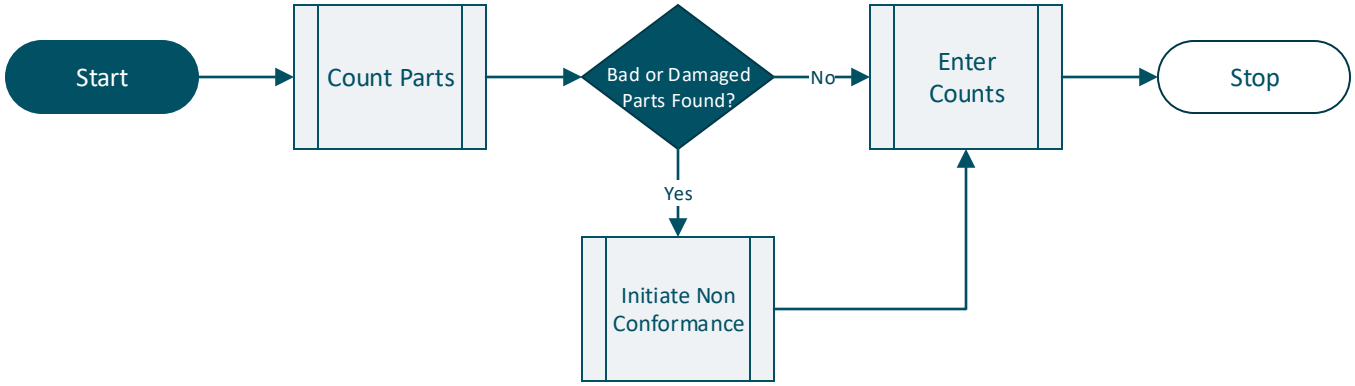
License Requirements

STAGE: Pre-Physical Inventory Processing



Role Assignment:
- Inventory Control

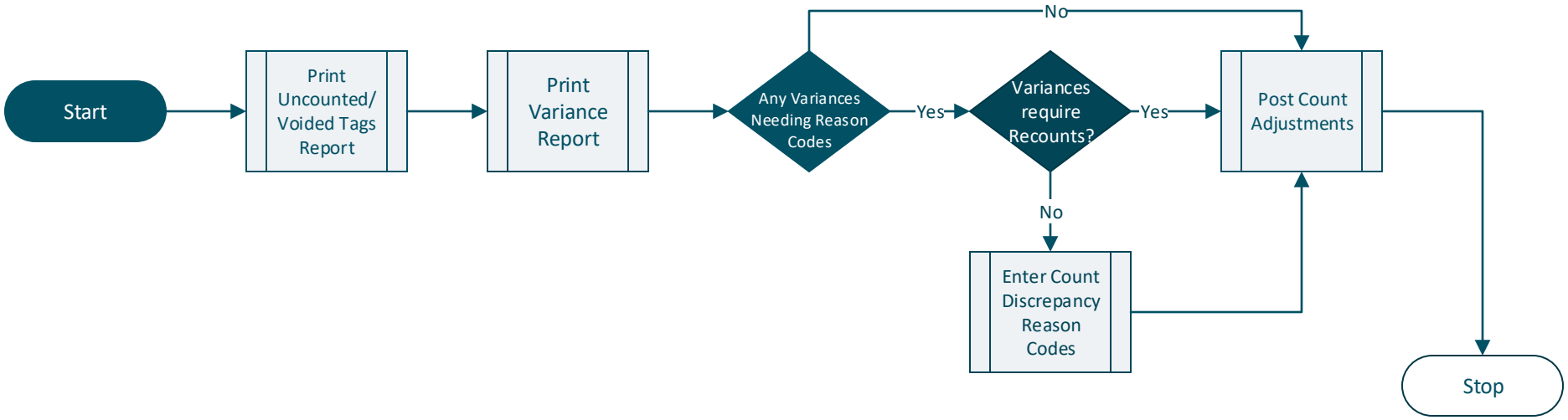
License Requirements:



Role Assignment:
- Inventory Control

License Requirements:

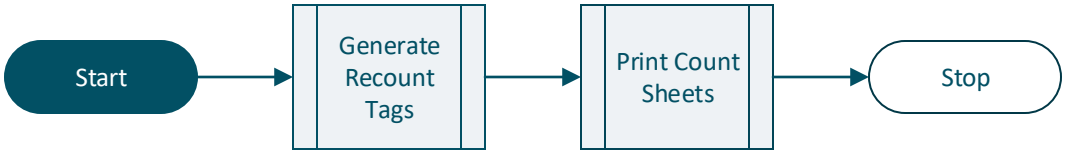
STAGE: Post-Count Processing



Role Assignment:
- Inventory Control

License Requirements:

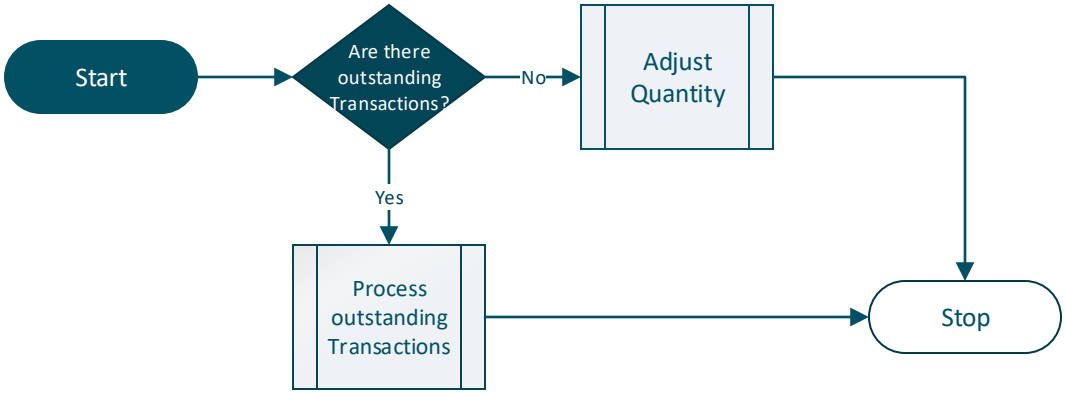
STAGE: Re-Count Processing



Role Assignment:
- Inventory Control

License Requirements

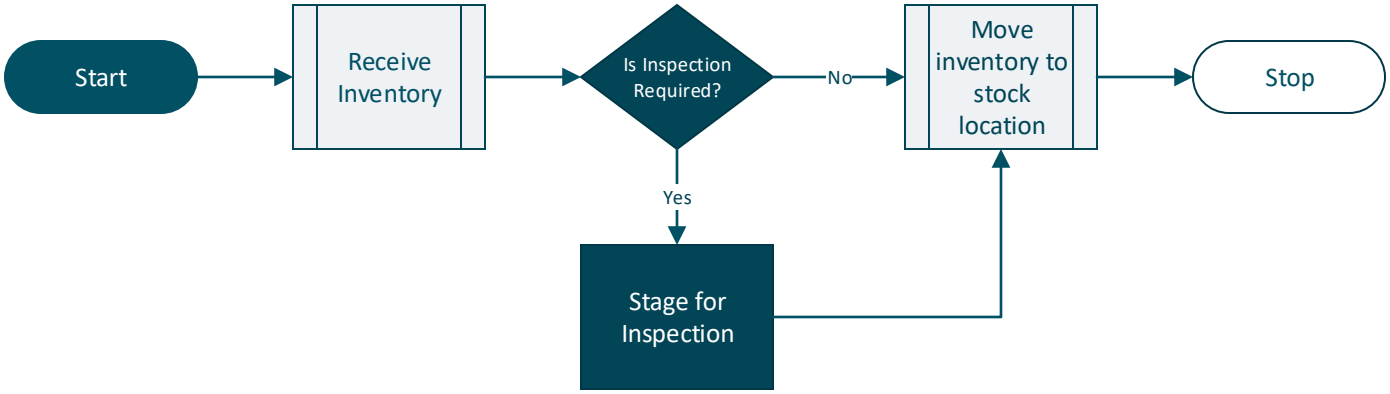
PROCESS: Quantity Adjustment



Role Assignment:
- Inventory Control

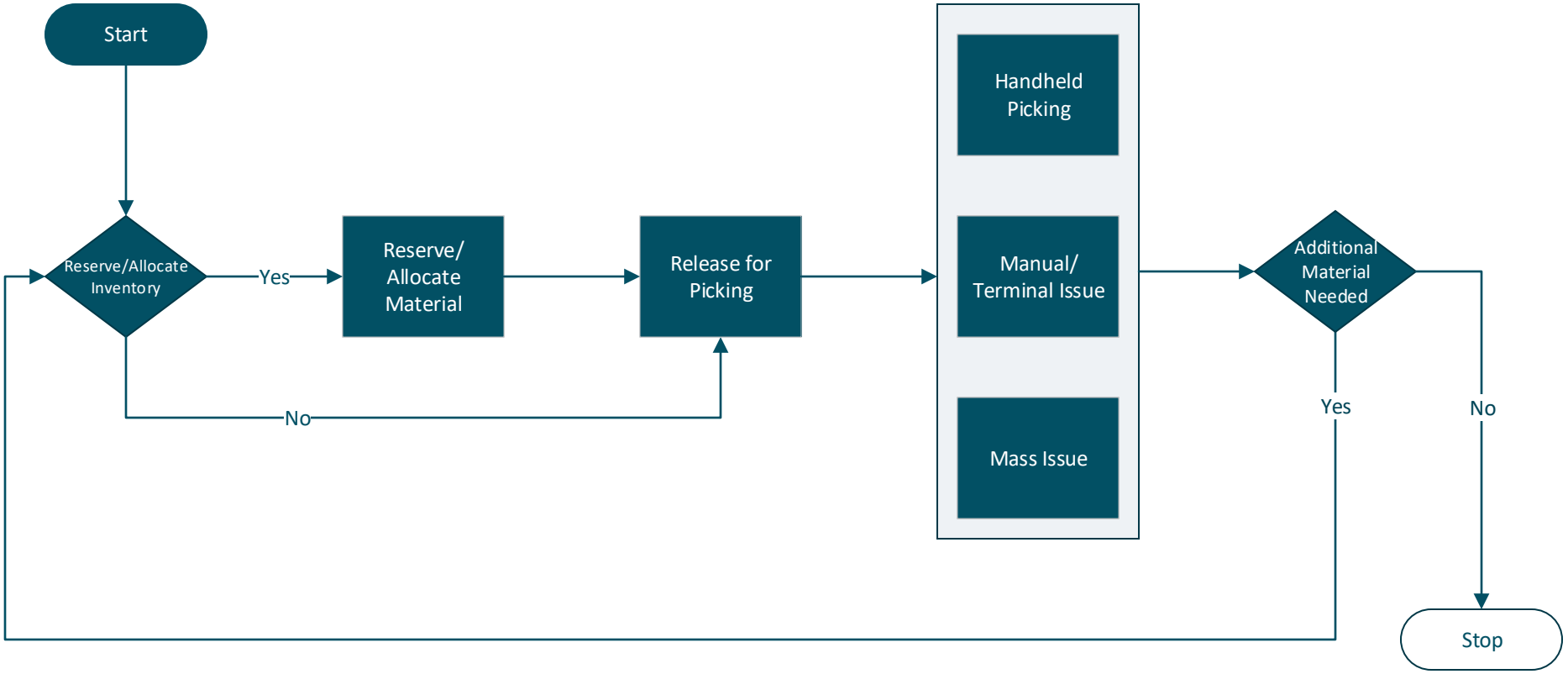
License Requirements:

PROCESS: Receive Inventory into Stock



Role Assignment:
- Inventory Control

License Requirements:

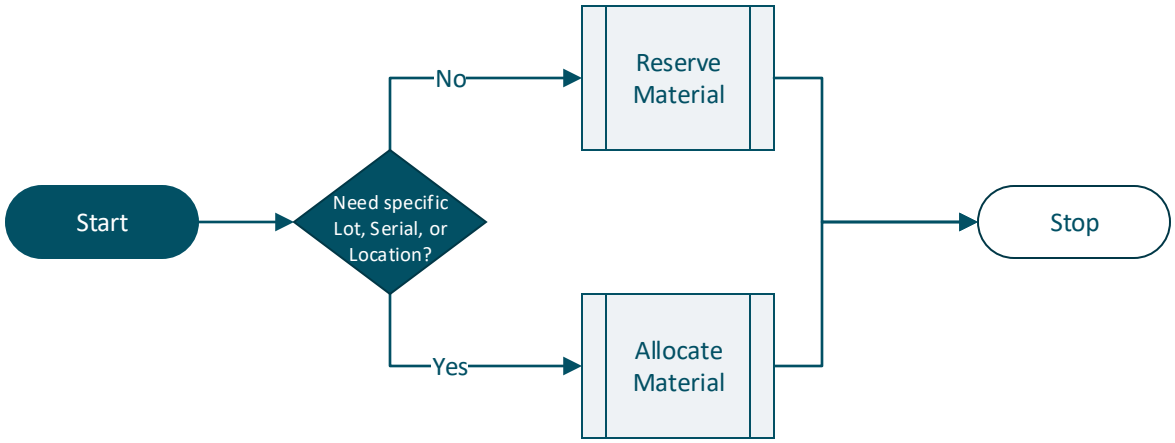


Role Assignment:
- Inventory Control / Material Handlers

Notes:
-Cannot Mass Issue Serialized Inventory

License Requirements:

STAGE: Reserve/Allocate Material

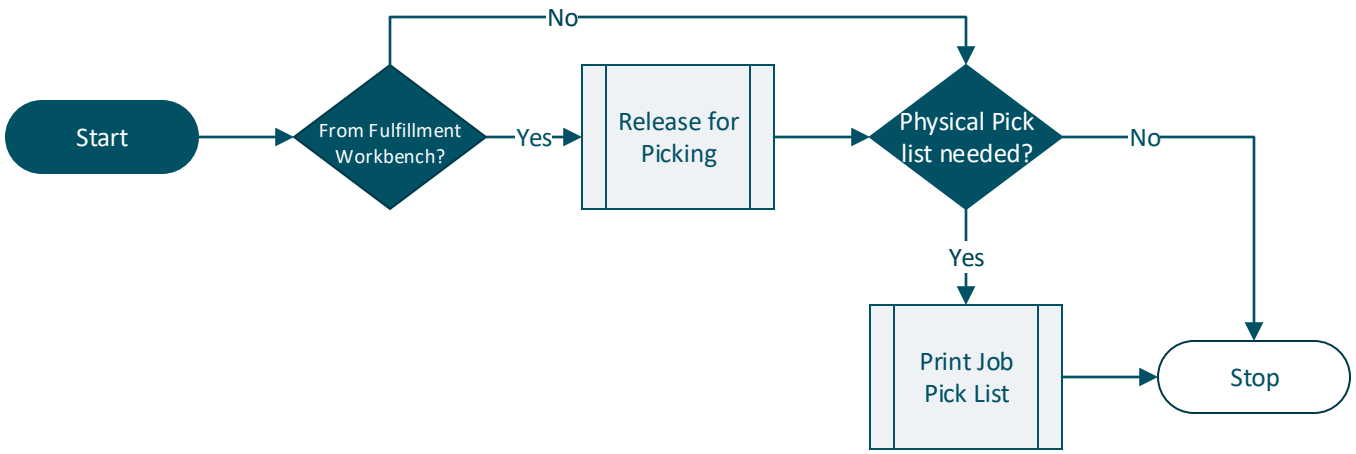


Role Assignment:
- Inventory Control / Material Handlers

Notes:
-When you Allocate Inventory, you specify Location, Lot or Serial Number. Reserve only holds a quantity without regard to any specific item.

License Requirements:

STAGE: Release for Picking

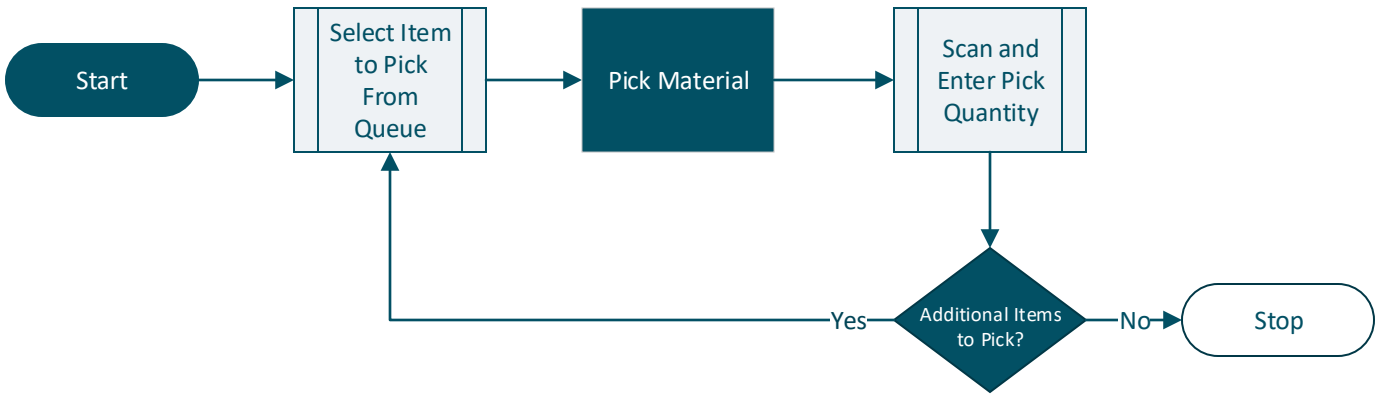


Role Assignment:
- Inventory Control / Material Handlers

Notes:
-Can print Pick List when Releasing for Picking

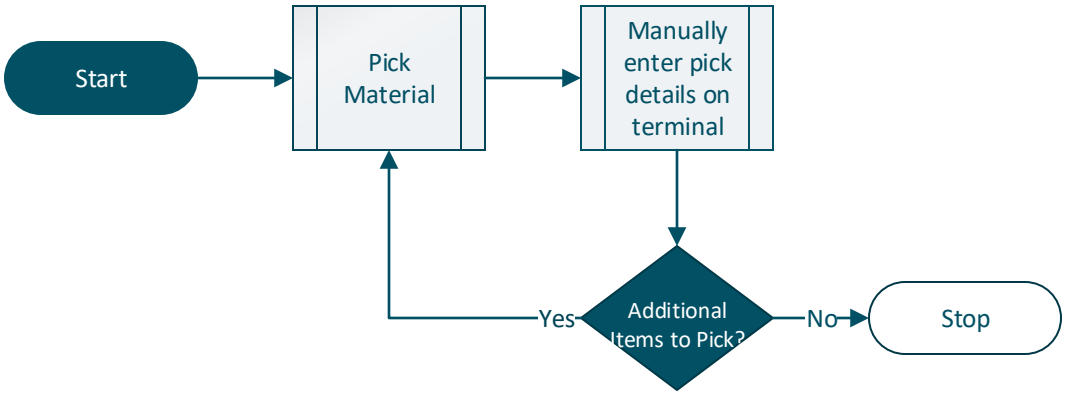
License Requirements:

Stage: Pick with Handheld



Role Assignment:
- Inventory Control / Material Handlers

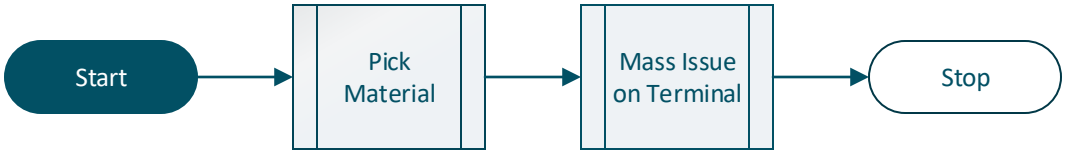
License Requirements:



Role Assignment:
- Inventory Control / Material Handlers

License Requirements:

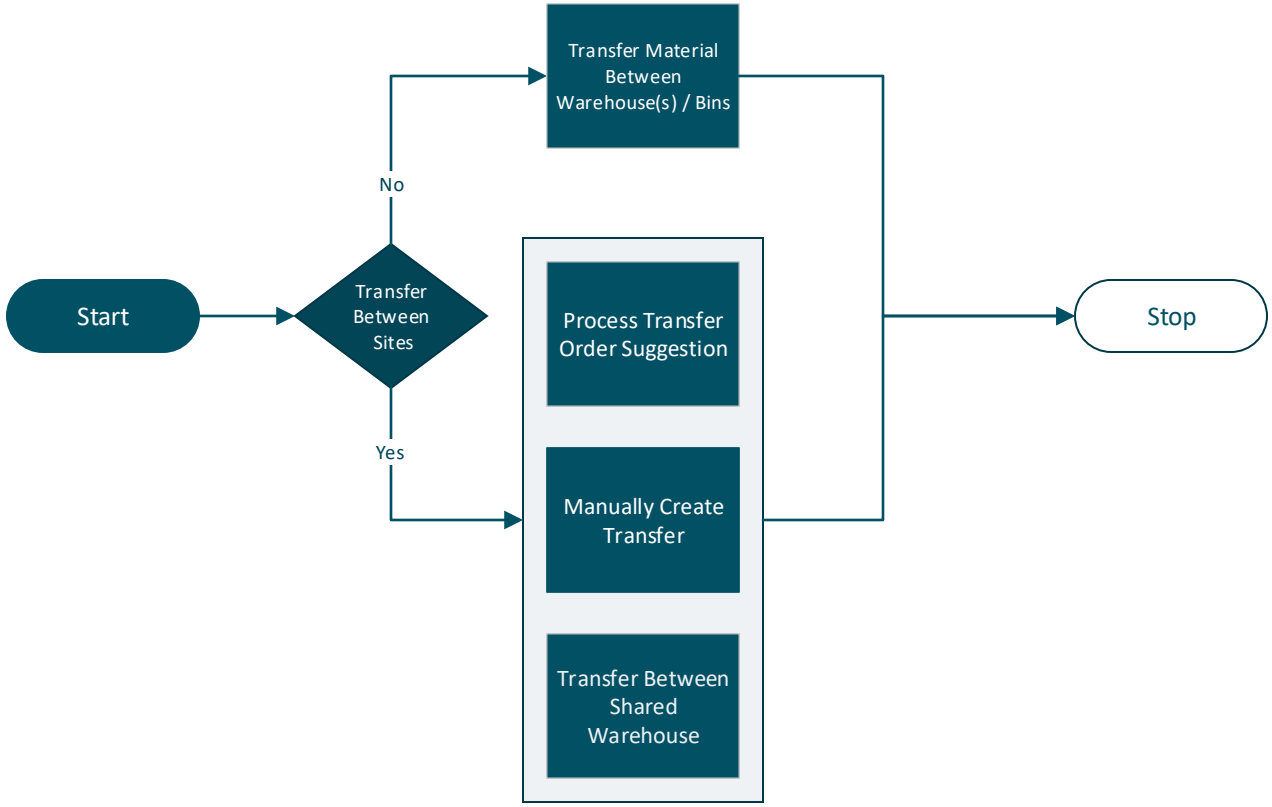
STAGE: Mass Issue



Role Assignment:
- Inventory Control / Material Handlers

License Requirements:

PROCESS: Create Transfer (Within or Across Sites)



Role Assignment:
- Inventory Control / Material Handlers

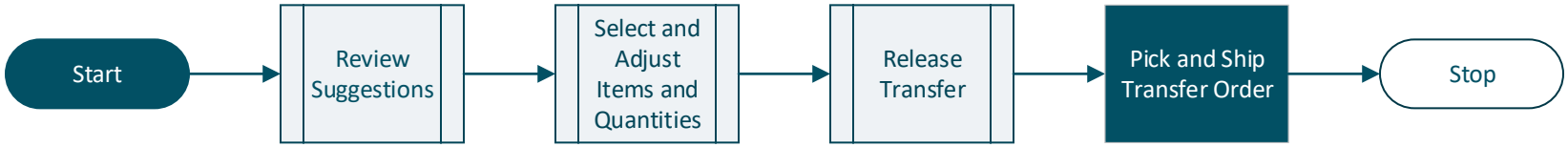
Notes:
- Transfers between Sites require Multi-Site License

License Requirements:

Role Assignment:
- Inventory Control / Material Handlers

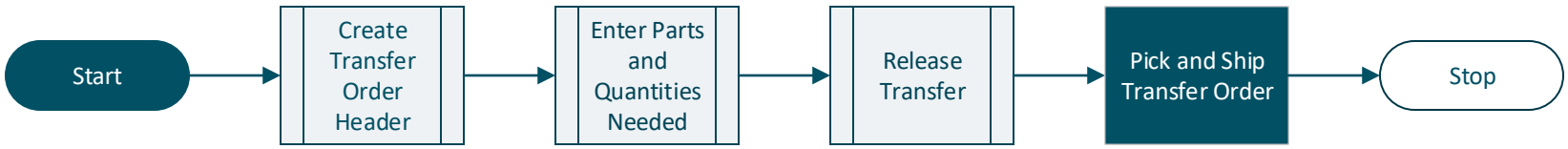
License Requirements:

STAGE: Process Transfer Order Suggestions



Role Assignment:
- Inventory Control / Material Handlers

License Requirements:

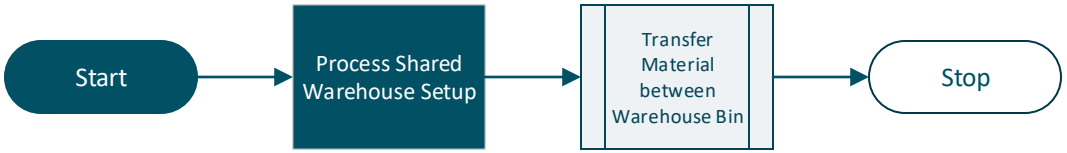


Role Assignment:
- Inventory Control / Material Handlers

Notes:
- Site requiring material creates the Transfer and specifies what Site they want the material to come from

License Requirements:

STAGE: Create Transfer Order Manually



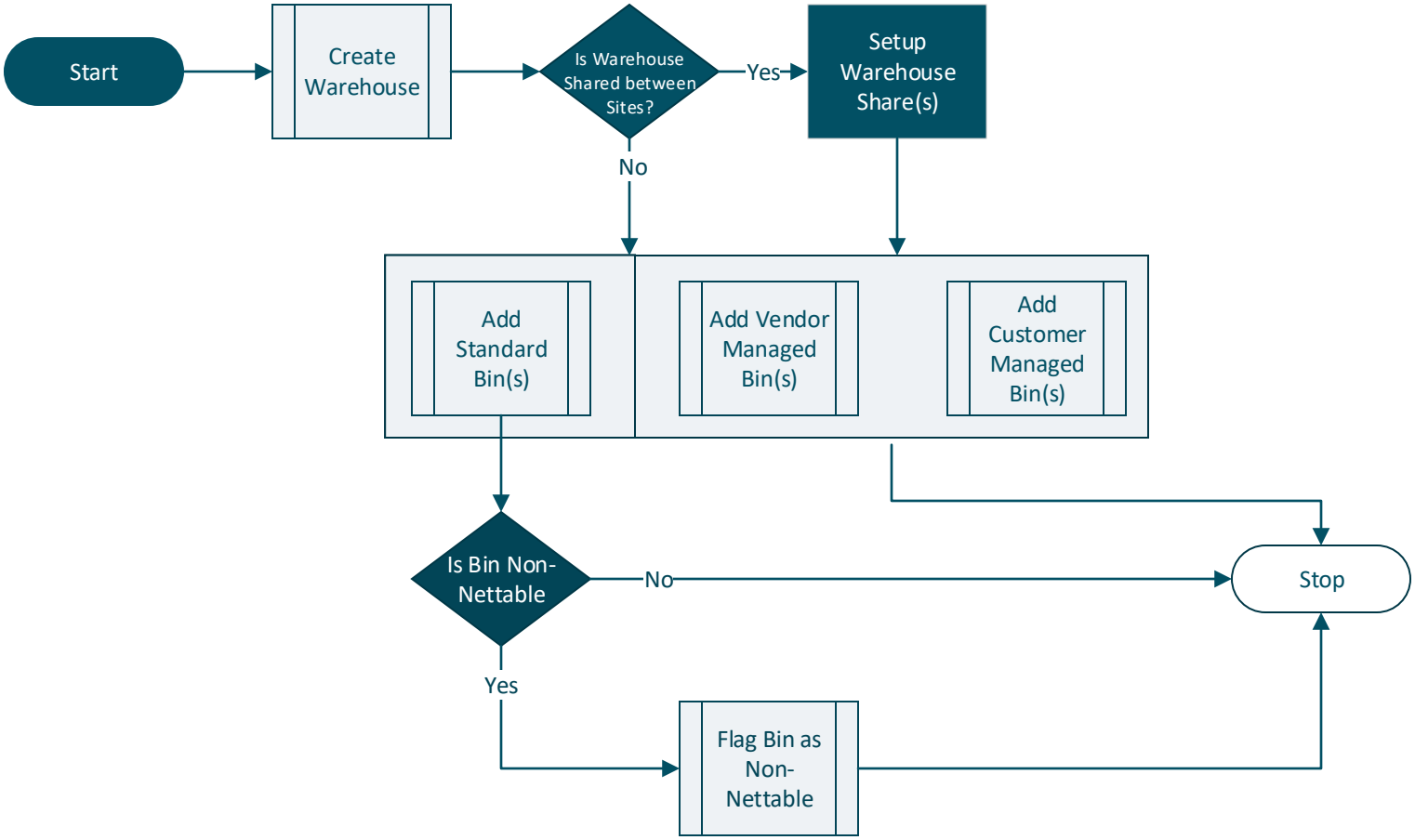
Role Assignment:
- Inventory Control / Material Handlers

Notes:
- Site requiring material creates the Transfer and specifies what Site they want the material to come from

License Requirements:

Role Assignment:
- Inventory Control

License Requirements:

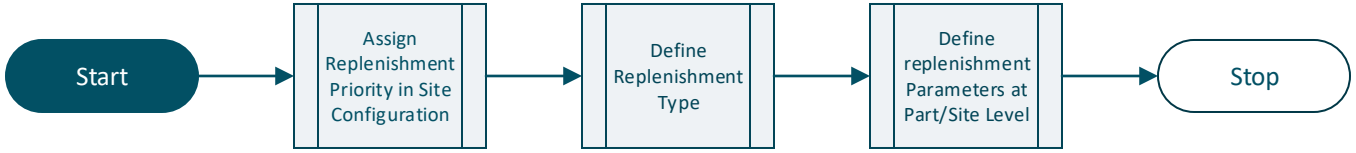


Role Assignment:
- Inventory Control

Notes:

License Requirements: Vendor and Customer Managed Bins require the Managed Inventory License

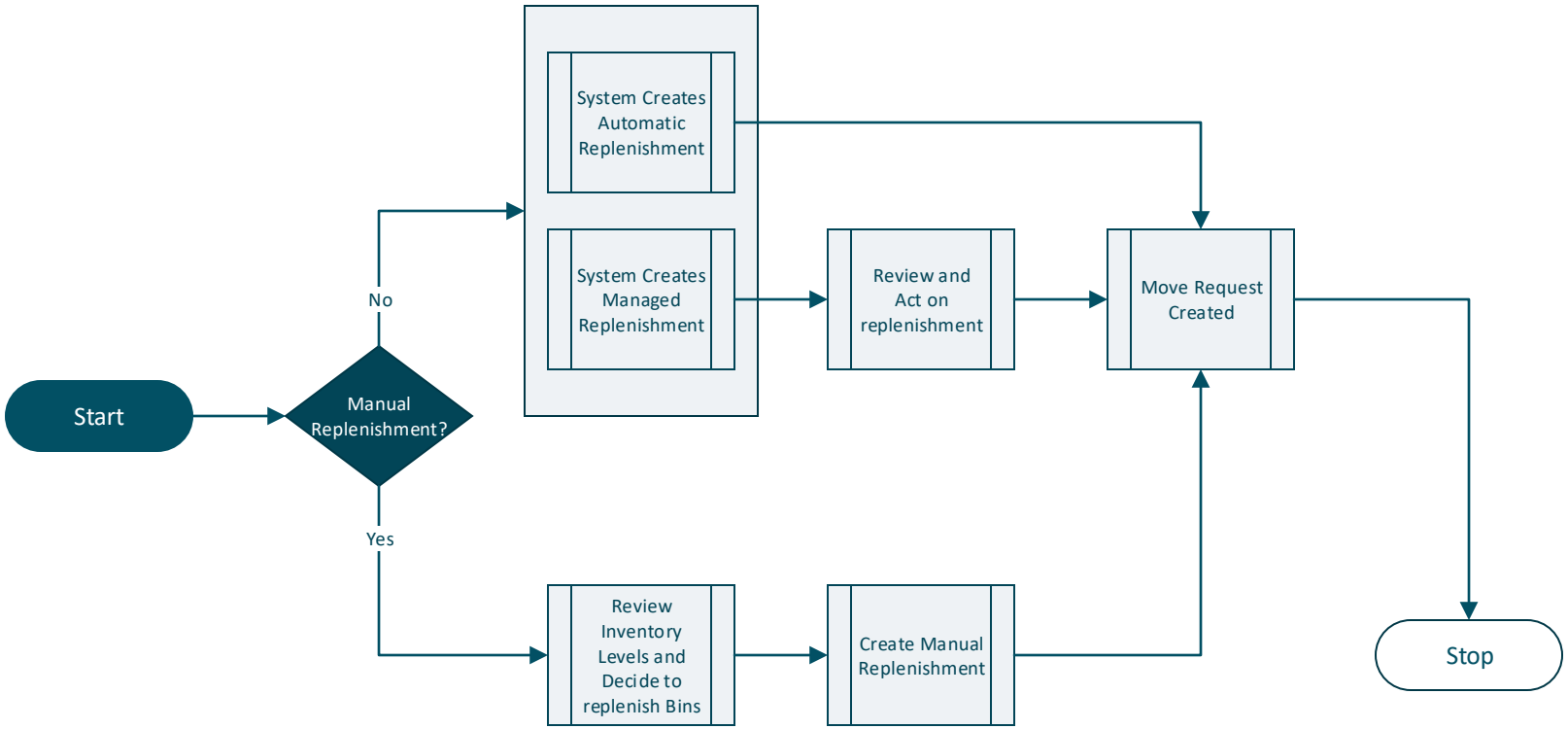
STAGE: Replenishment Setup



Role Assignment:
- Inventory Control

License Requirements:

STAGE: Process Bin Replenishment

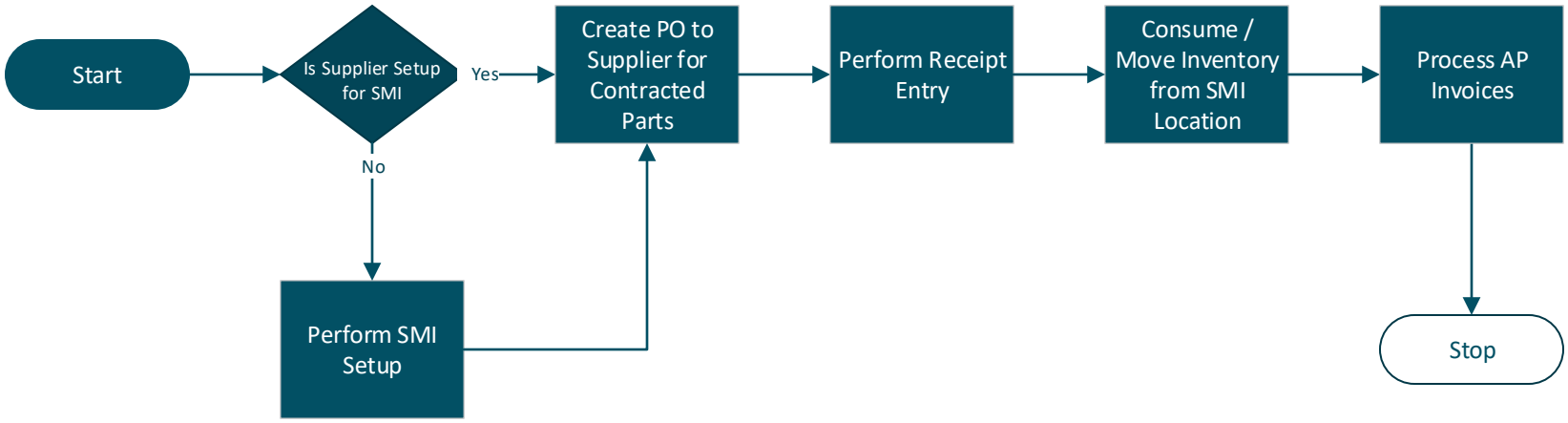


Role Assignment:
- Inventory Control

Notes:
- System generates replenishment requests when inventory availability goes below Minimum values

License Requirements:

PROCESS: Supplier Managed Inventory



Role Assignment:
- Inventory Control

Notes:
- The AP processes are delayed until the stock is consumed or moved out of the Supplier Managed Bin

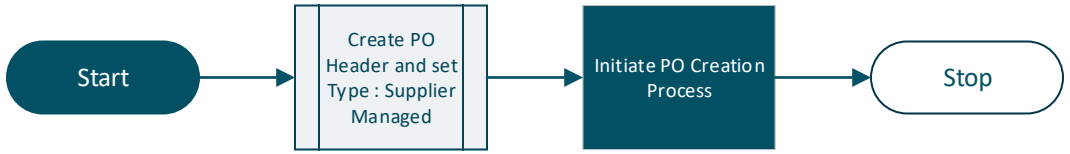
License Requirements:

STAGE: Supplier SMI Setup

Role Assignment:
- Inventory Control

License Requirements:

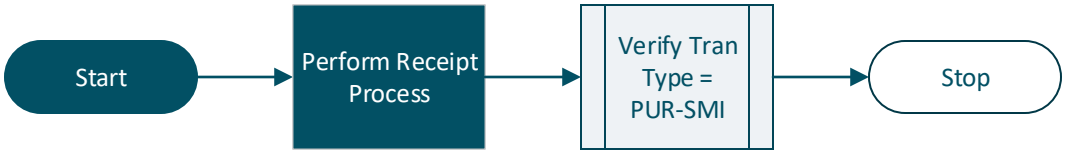
STAGE: Create PO to Supplier for Contracted Parts



Role Assignment:
- Inventory Control

License Requirements:

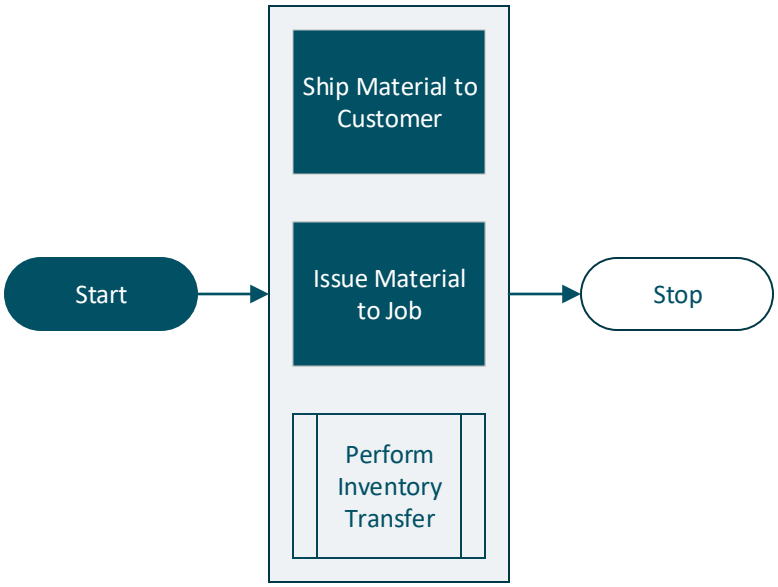
STAGE: Perform Receipt Entry



Role Assignment:
- Inventory Control

License Requirements:

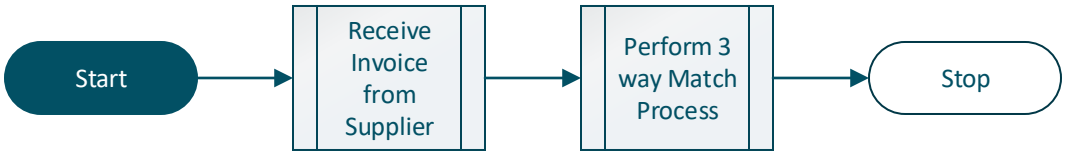
STAGE: Consume Inventory from SMI Location



Role Assignment:
- Inventory Control

License Requirements:

STAGE: Consume Inventory from SMI Location

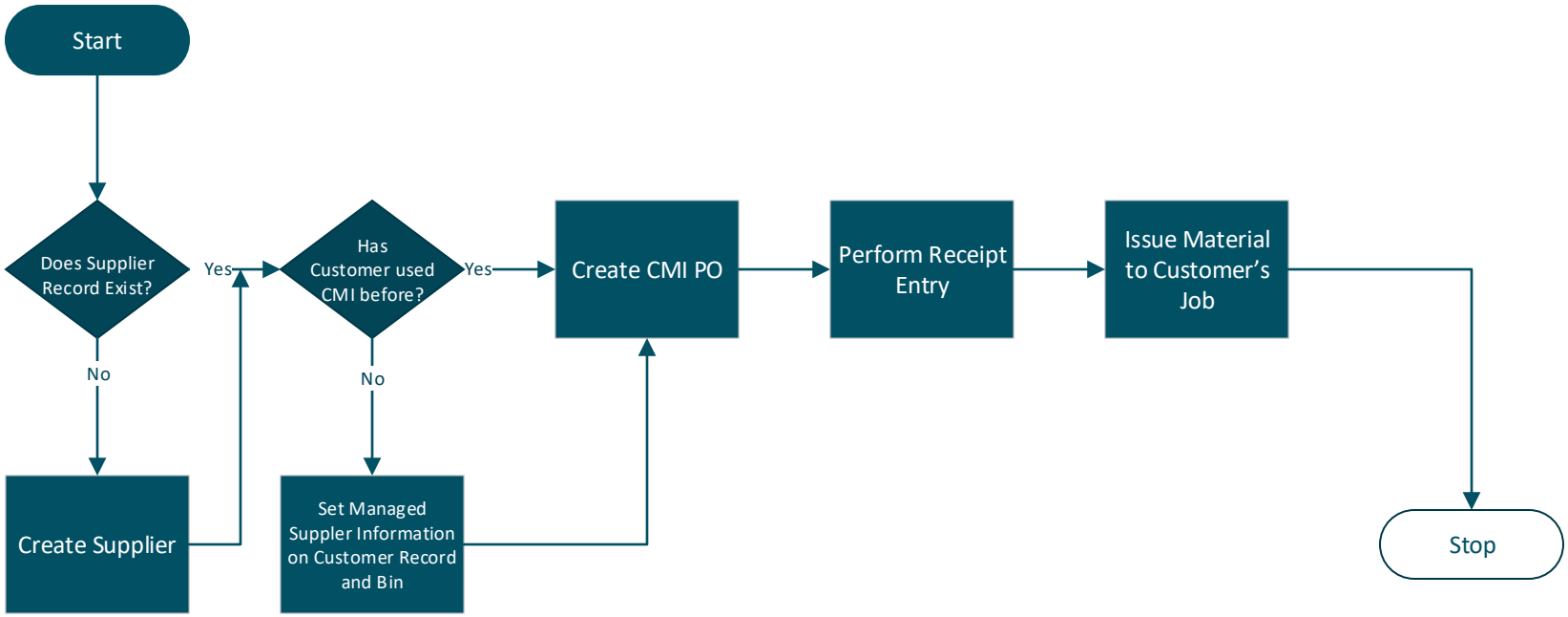


Role Assignment:
- Inventory Control

Note:
- Supplier Invoices will not show for matching or show on the Received Not Invoiced Report until the inventory is transferred out of the SMI Bin

License Requirements:

Process: Supplier Managed Inventory

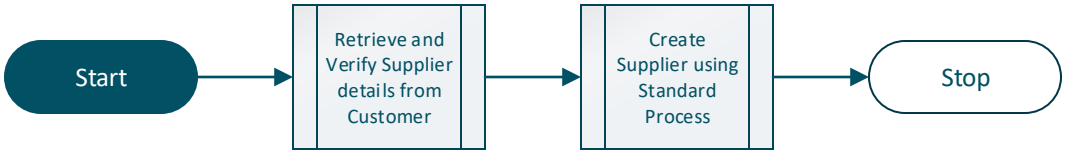


Role Assignment:
- Inventory Control

Notes:
- Customer Managed Inventory will not create an AP clearing Process. There will not be an AP invoice for this material

License Requirements:

STAGE: Create Supplier

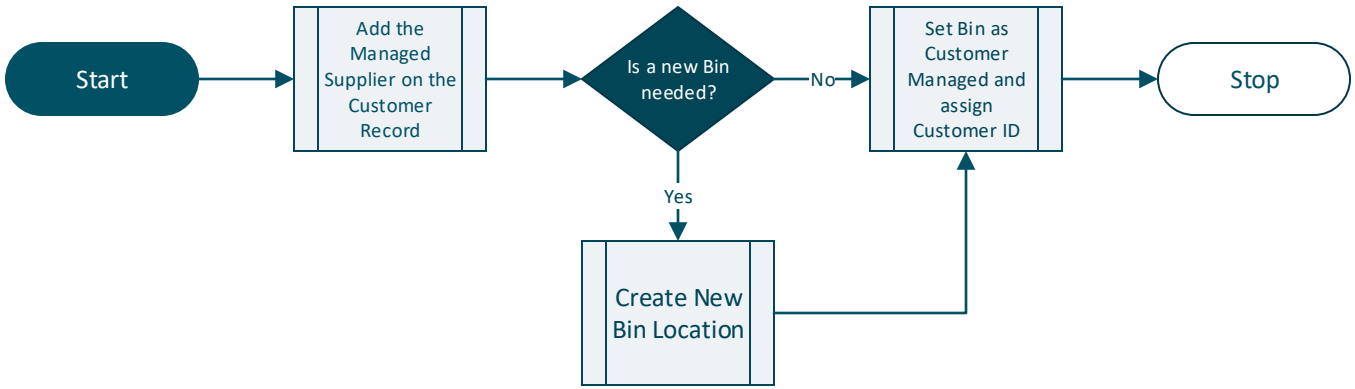


Role Assignment:
- Accounts Payable / Sales

Notes:
- Suppliers are not flagged for Customer Managed Inventory in Supplier Setup. This will be done on the Customer Record and when creating the PO

License Requirements:

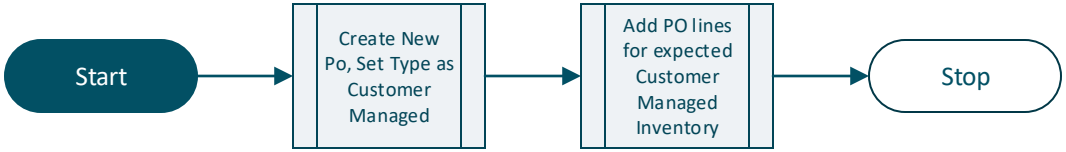
STAGE: Set Managed Supplier and Bin Location for Customer



Role Assignment:
- Sales / Inventory Control

License Requirements:

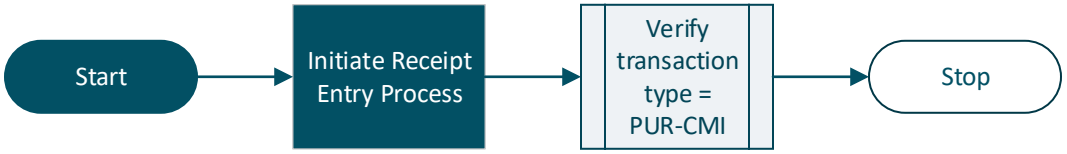
STAGE: Generate CMI PO



Role Assignment:
- Purchasing

License Requirements:

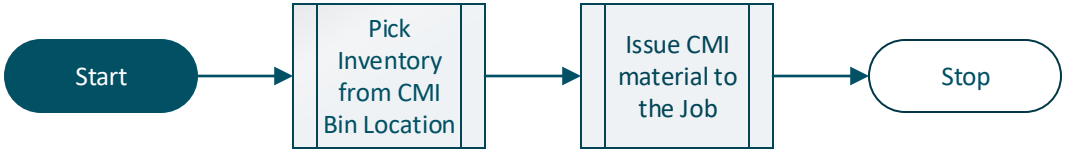
STAGE: Generate CMI PO



Role Assignment:
- Inventory Control

License Requirements:

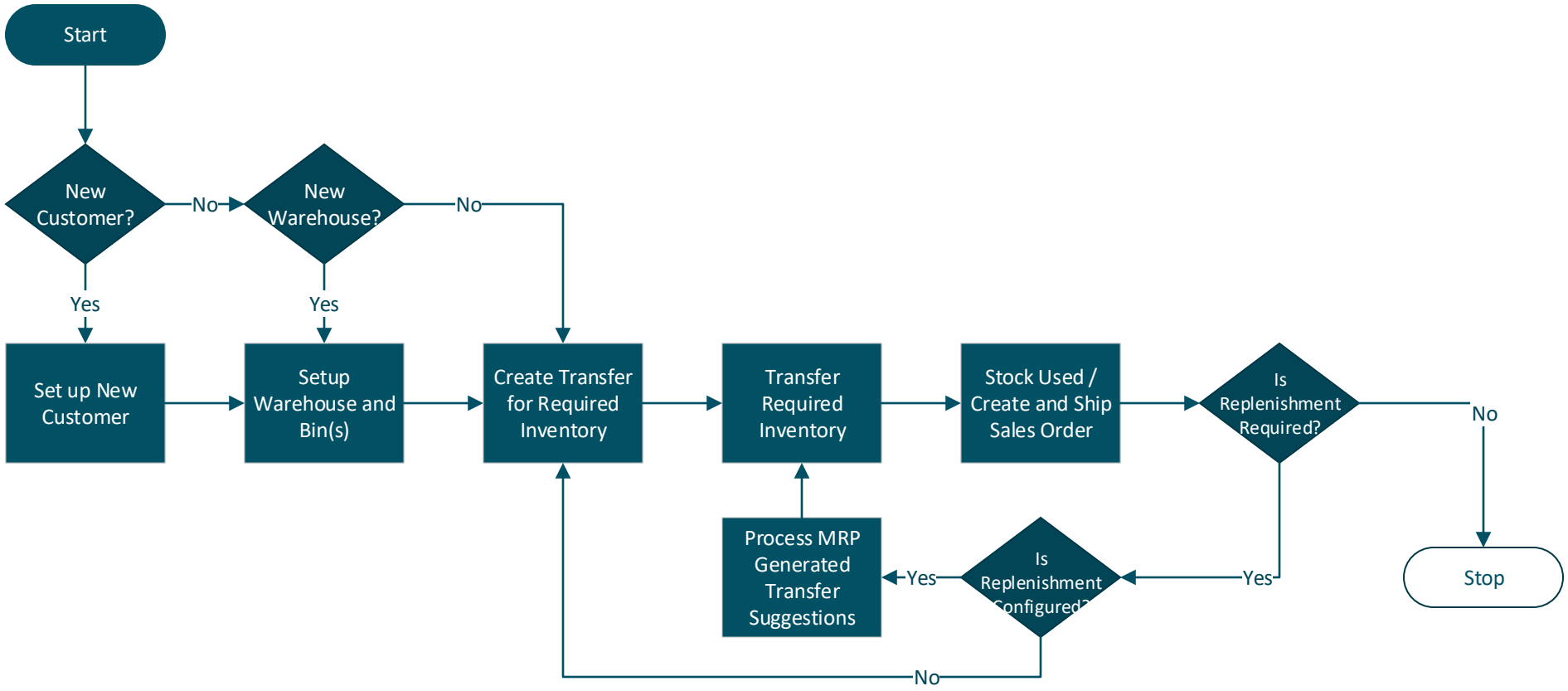
STAGE: Issue Material to the Customers Job



Role Assignment:
- Inventory Control

License Requirements:

PROCESS: Customer Site Stored Inventory



Role Assignment:
- AP / Inventory Control

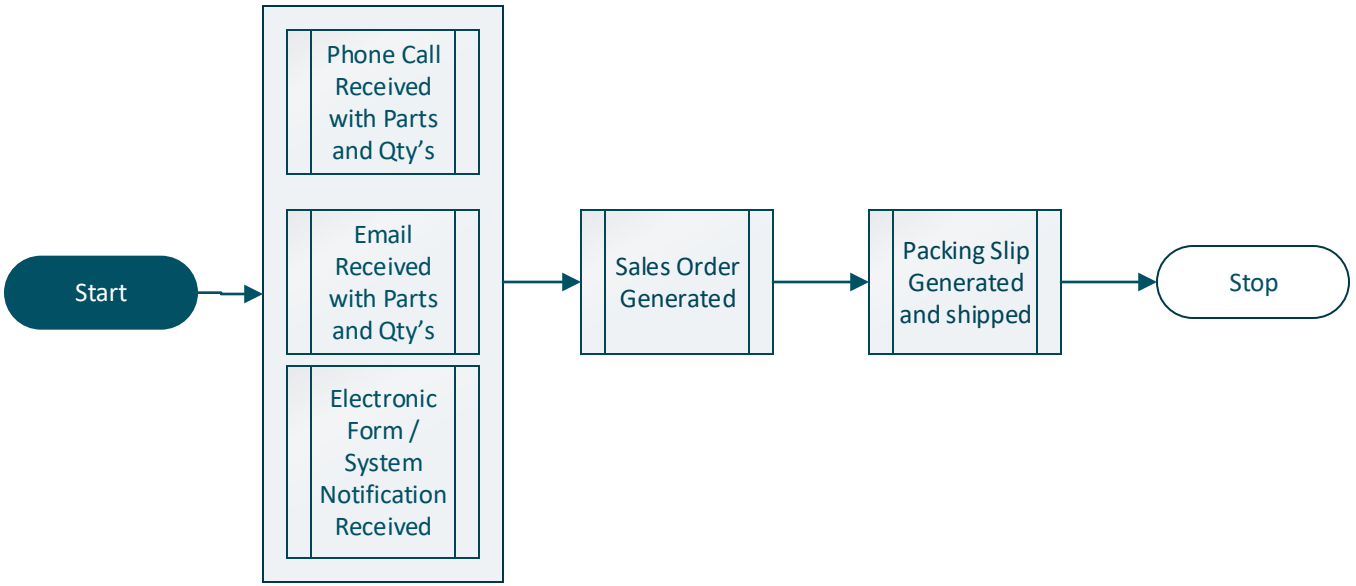
License Requirements:

STAGE: Setup New Customer

Role Assignment:
- AP

License Requirements:

STAGE: Stock Used / Create and Ship Sales Order



Role Assignment:
- Customer Service/Inventory Control

License Requirements:

Engineering

FUNCTION MENU

INVENTORY MENU

Engineering Change Order (ECO)

Engineer Part

Part Method of Manufacture

Parts MFG Across Sites

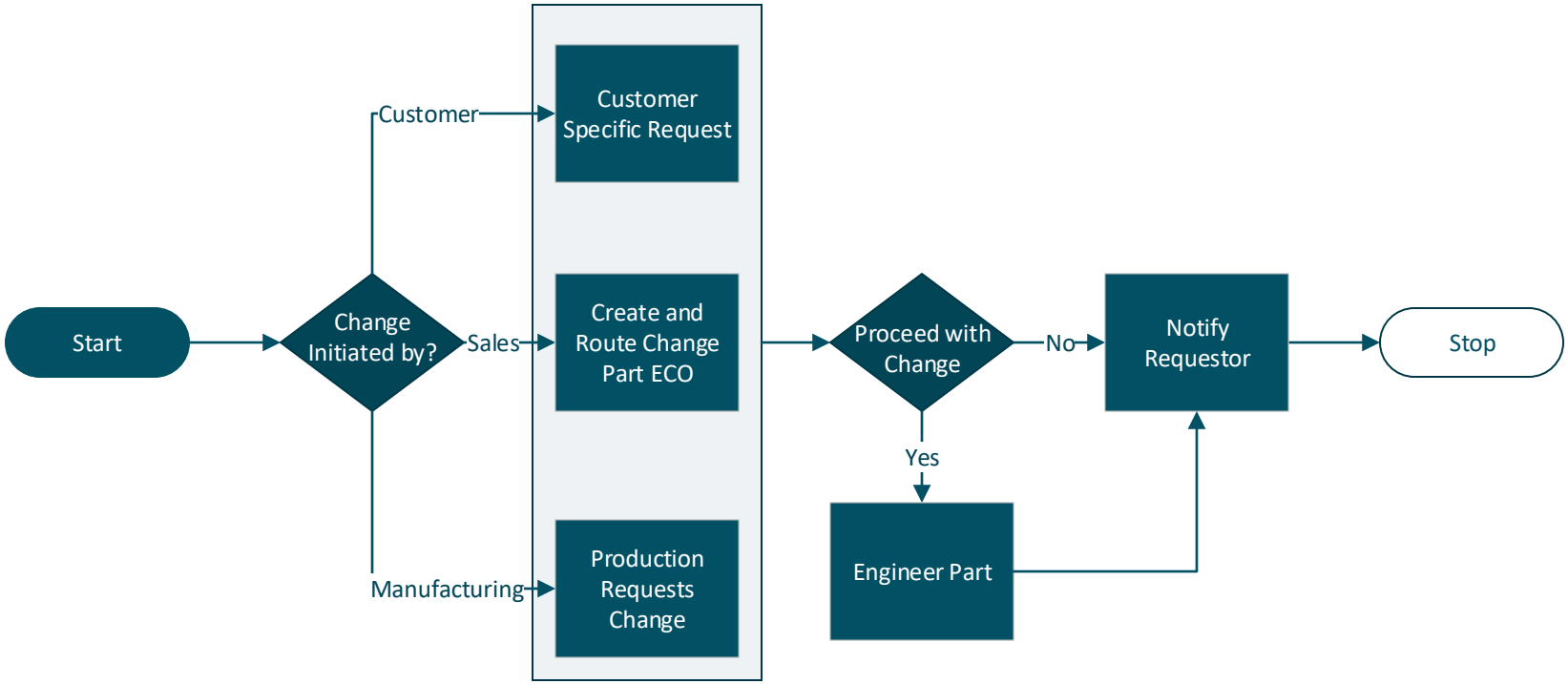
Engineer Quote

Reference Designators

RoHS Setup

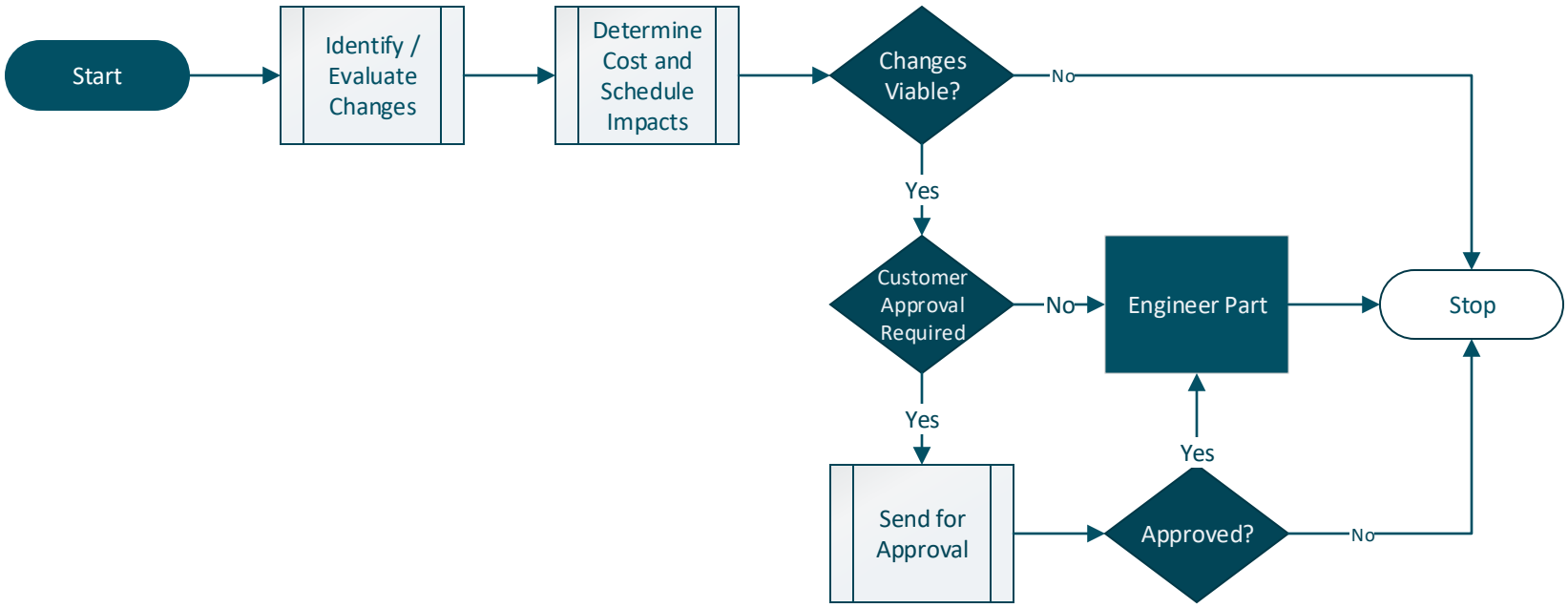
RoHS Compliance

PROCESS: Engineering Change Order



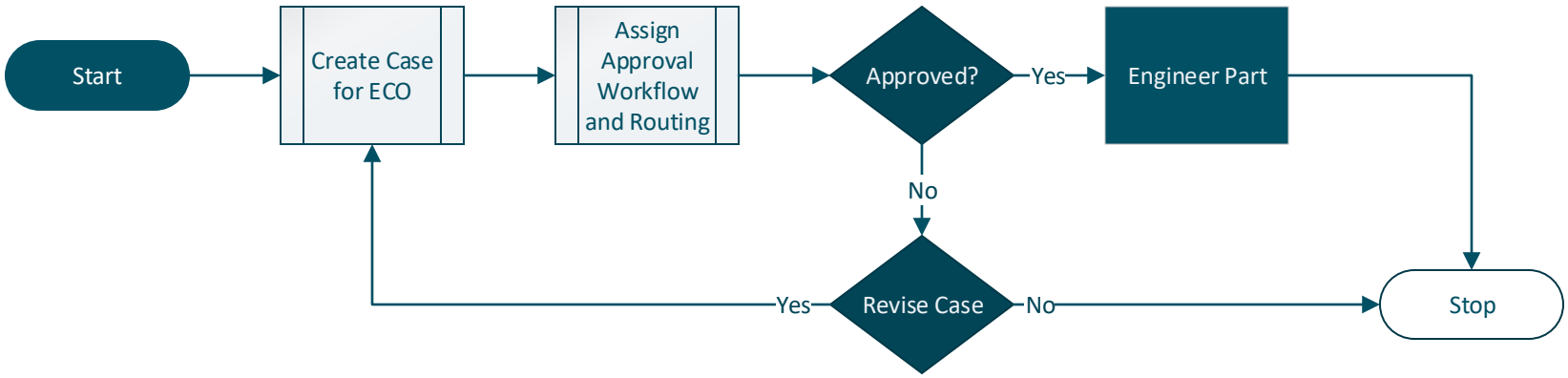
Role Assignment:
- Production/Sales

License Requirements:



Role Assignment:
- Sales / Customer Service

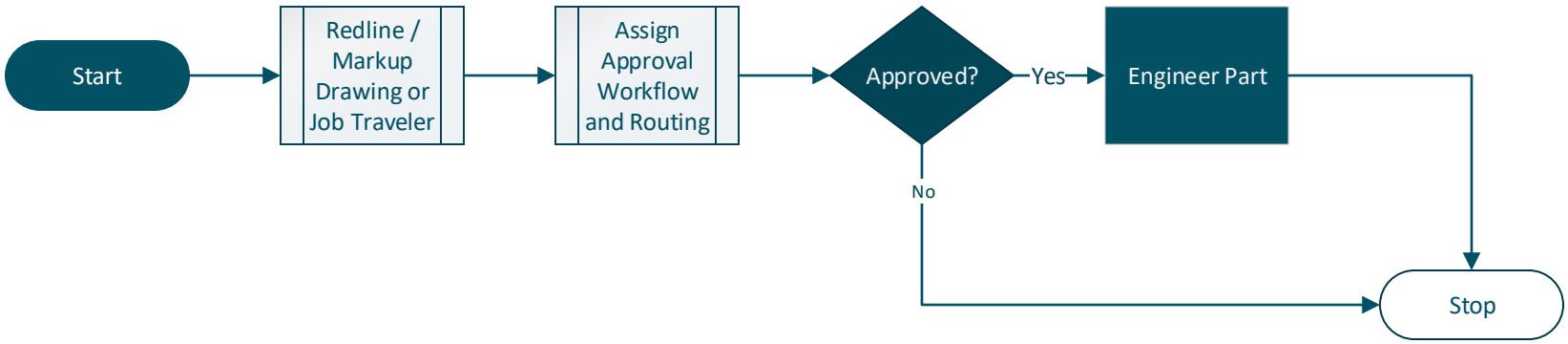
License Requirements:



Role Assignment:
- Sales / Customer Service

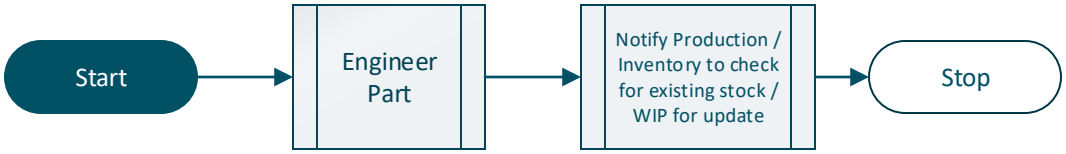
License Requirements:

STAGE: Production Initiates Change Request



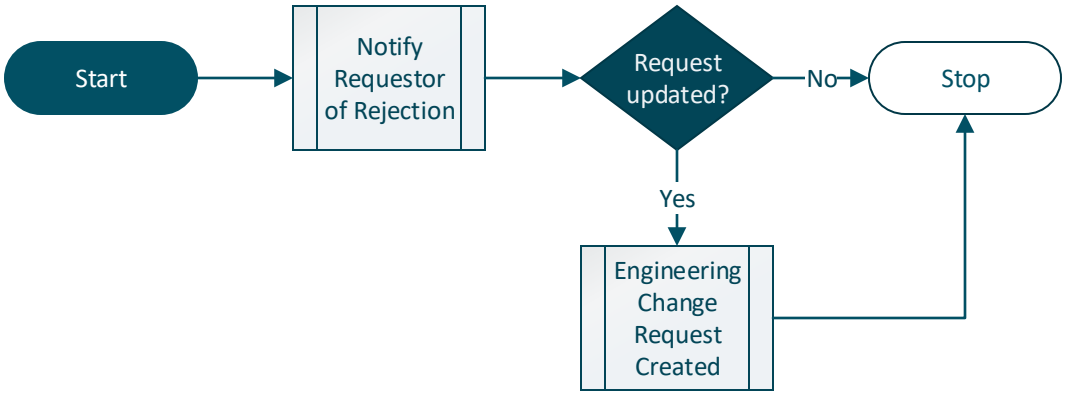
Role Assignment:
- Production / Engineering

License Requirements:



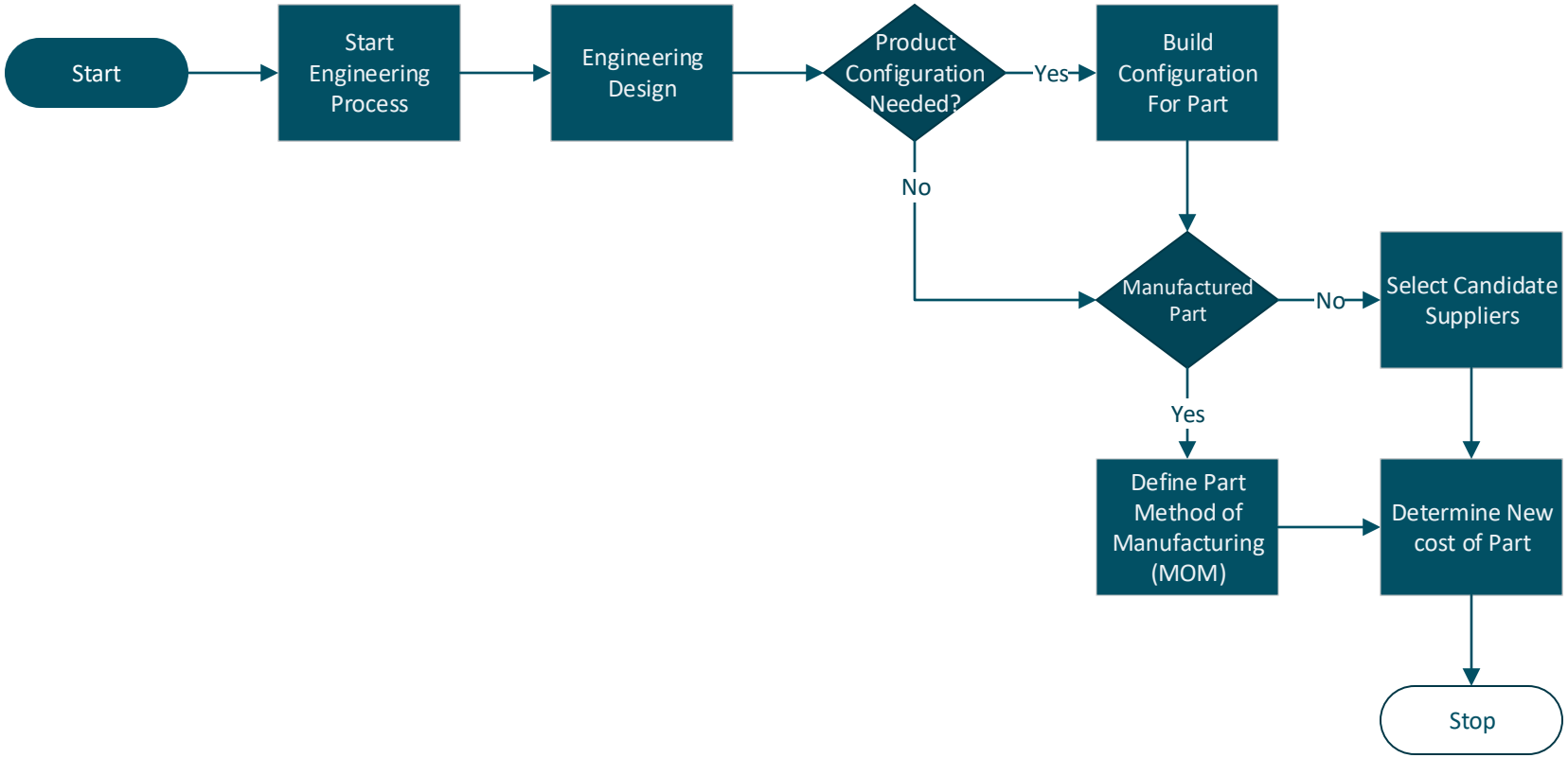
Role Assignment:
- Production / Engineering / Inventory Control

License Requirements:



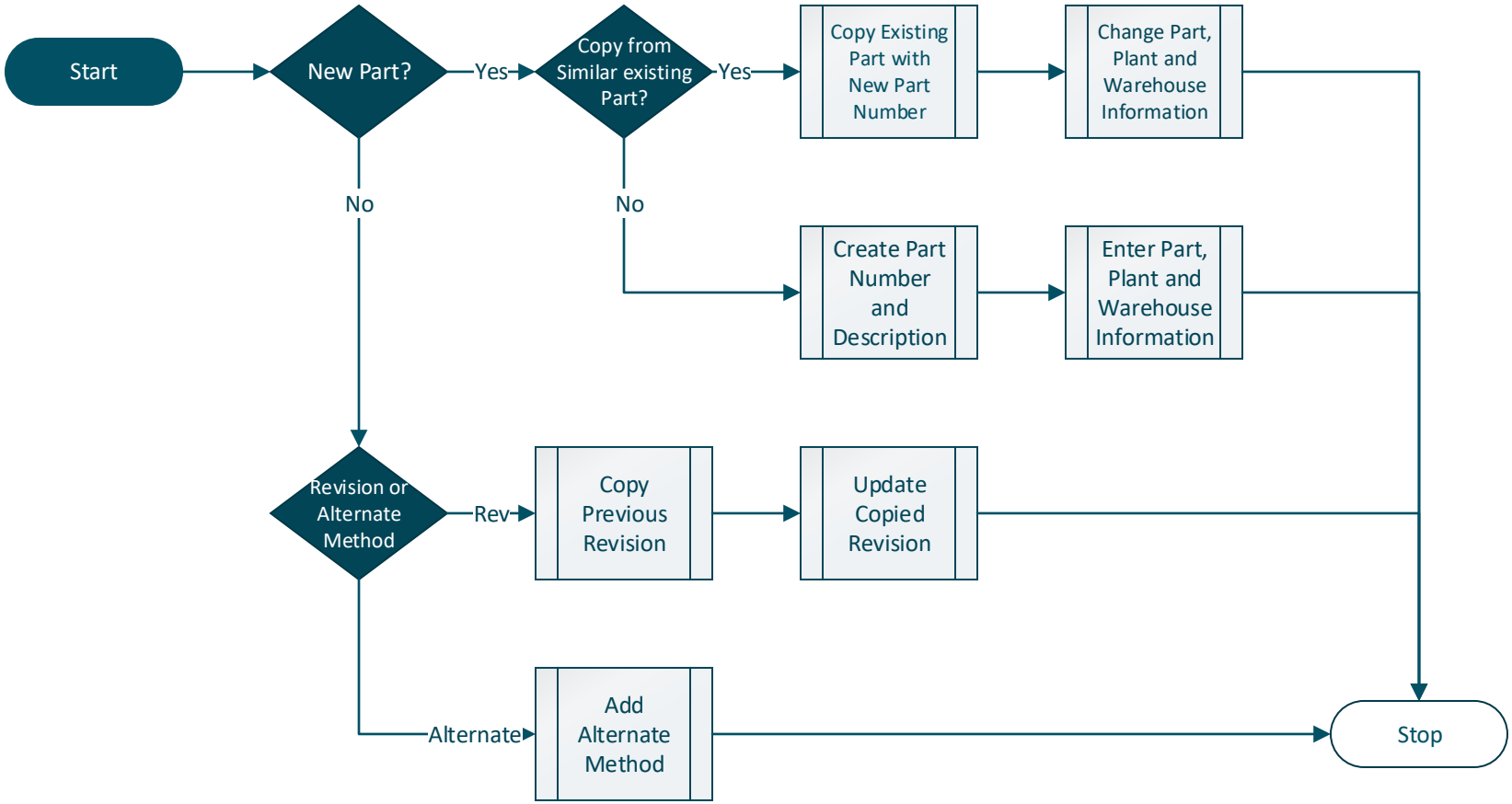
Role Assignment:
- Engineering / Customer Service

License Requirements:



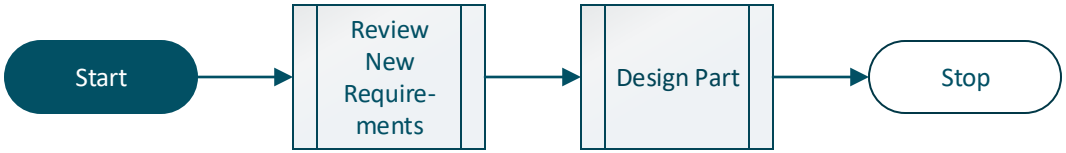
Role Assignment:
- Engineering / Purchasing / Finance

License Requirements:



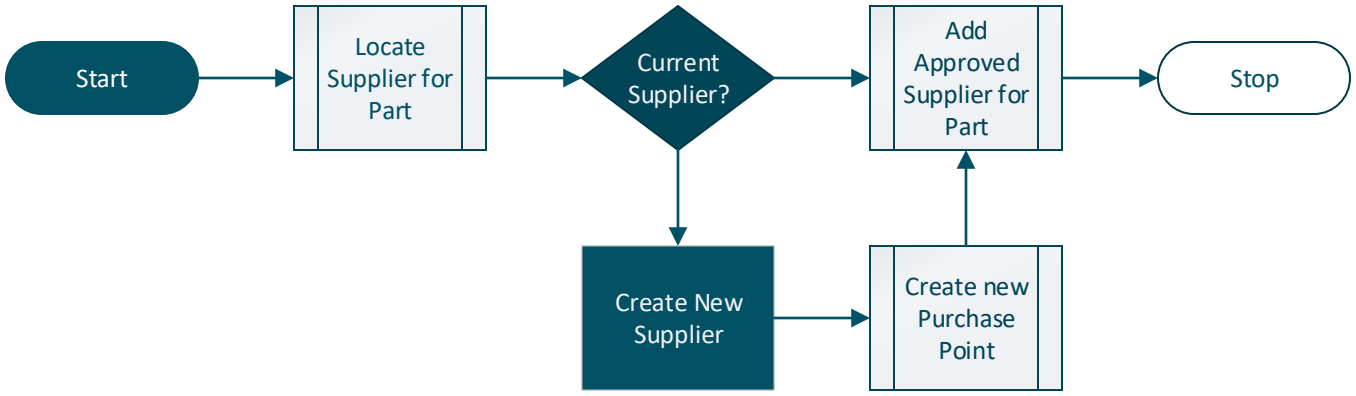
Role Assignment:
- Engineering

License Requirements:



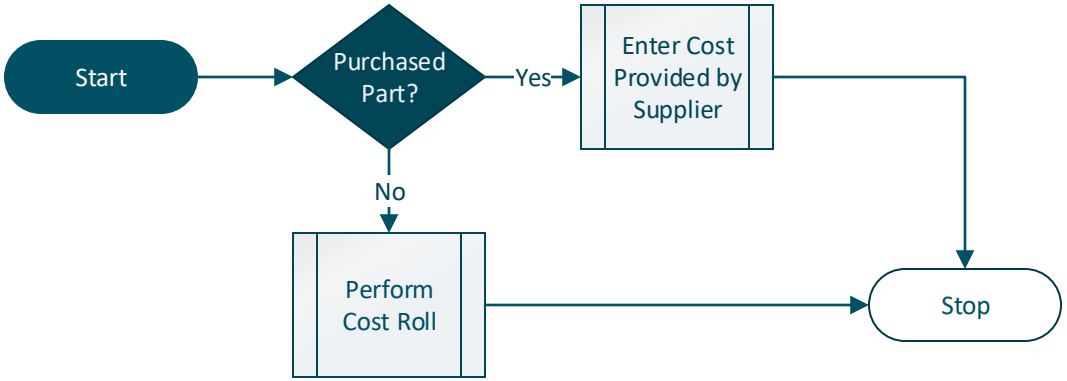
Role Assignment:
- Engineering

License Requirements:



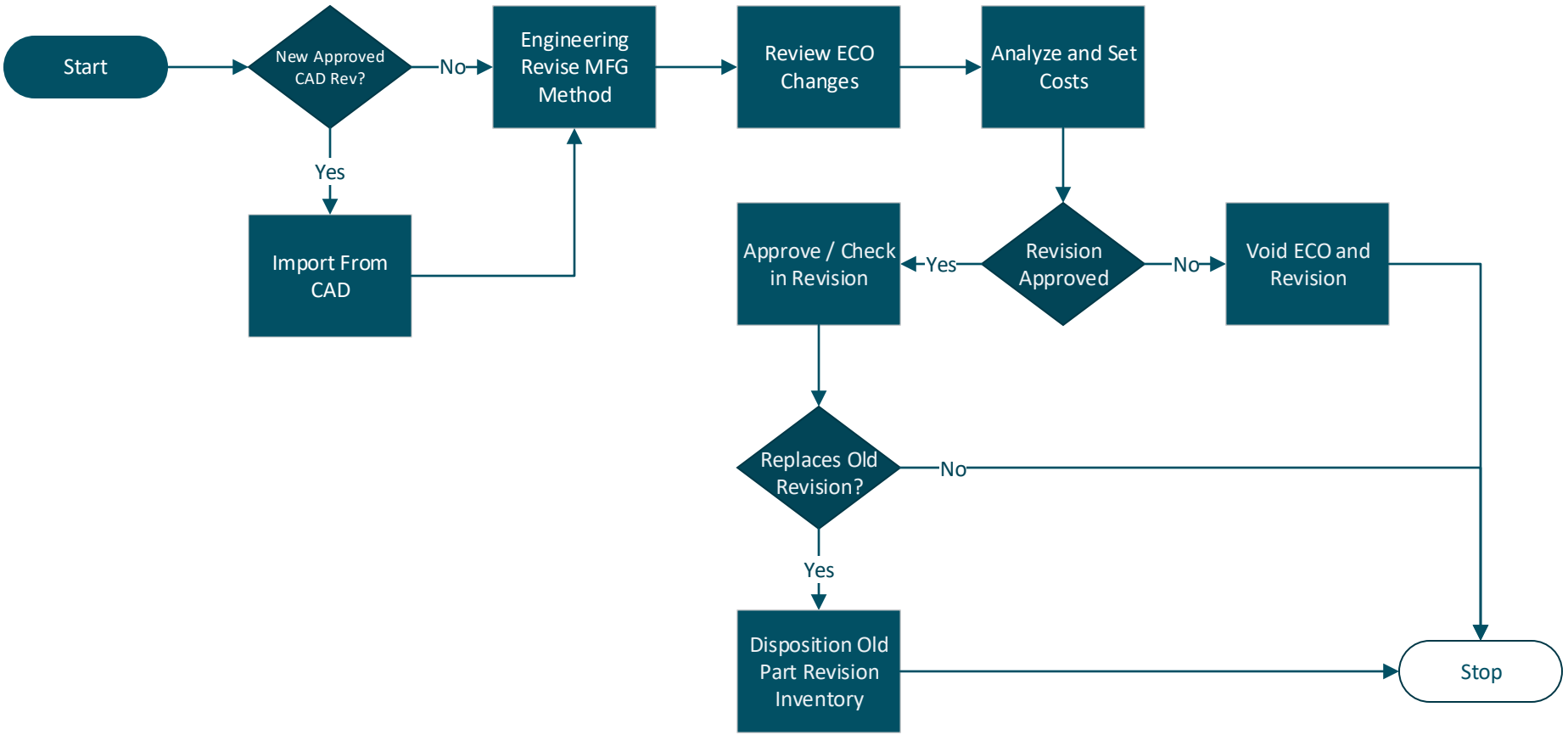
Role Assignment:
- Engineering / Purchasing

License Requirements:



Role Assignment:
- Engineering/Finance

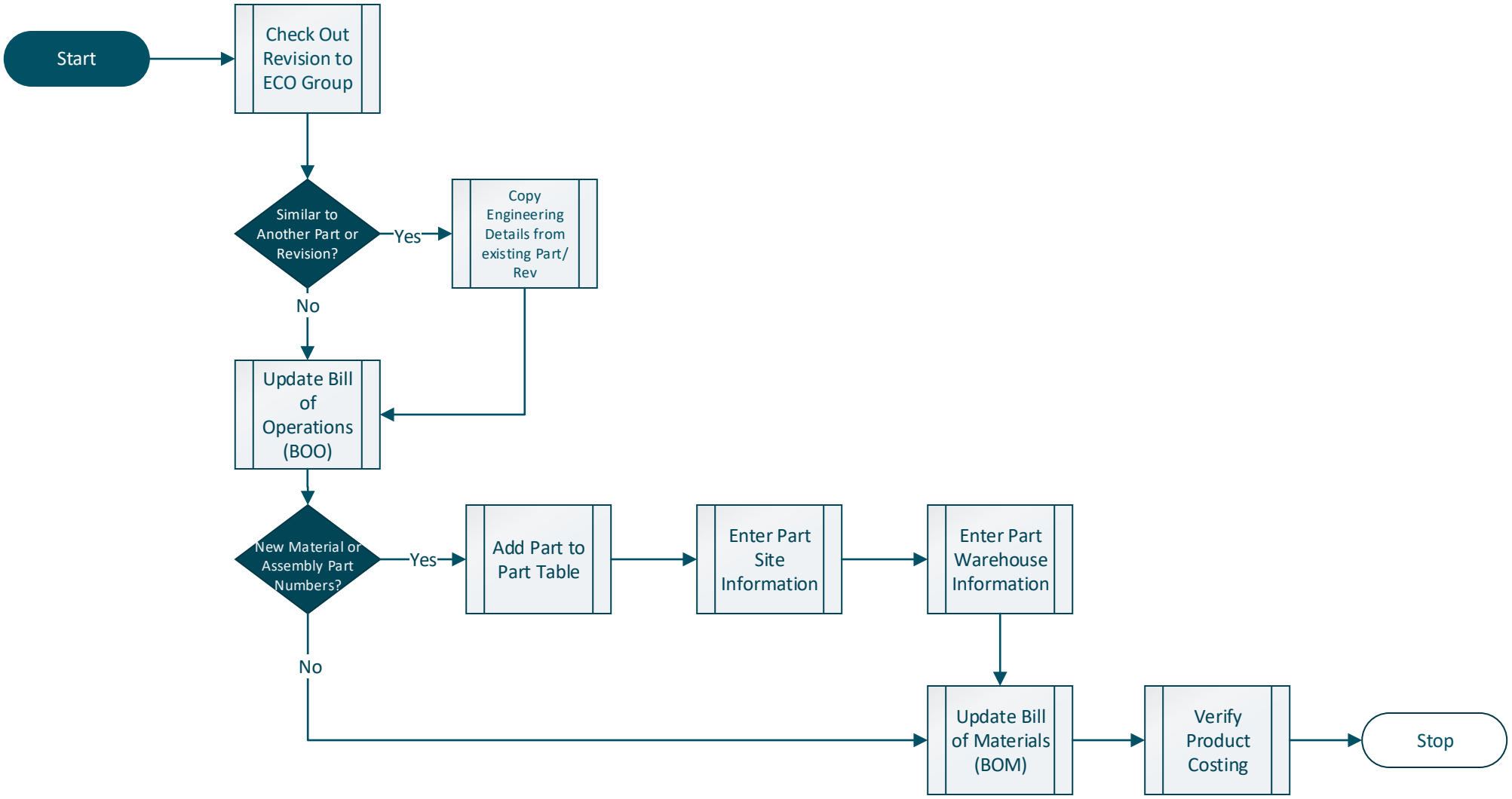
License Requirements:



Role Assignment:
- Engineering/Finance

License Requirements:

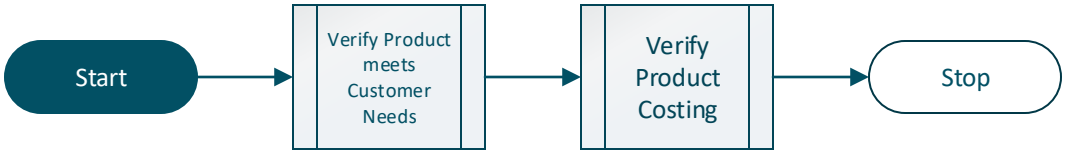
STAGE: Engineering Revise Method of Manufacture



Role Assignment:
- Engineering/Finance

License Requirements:

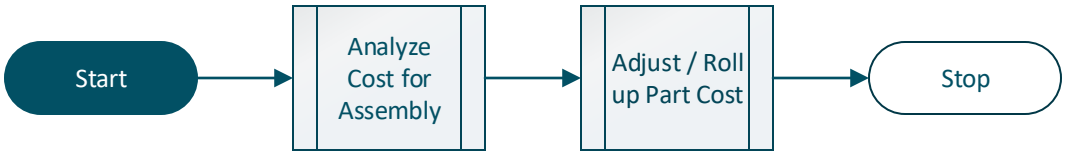
STAGE: Review ECO Changes



Role Assignment:
- Engineering/Finance

License Requirements:

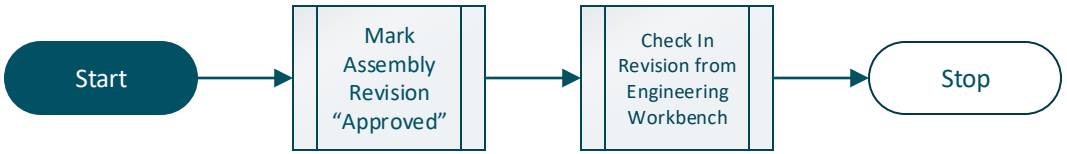
STAGE: Analyze and Set Costs



Role Assignment:
- Finance

License Requirements:

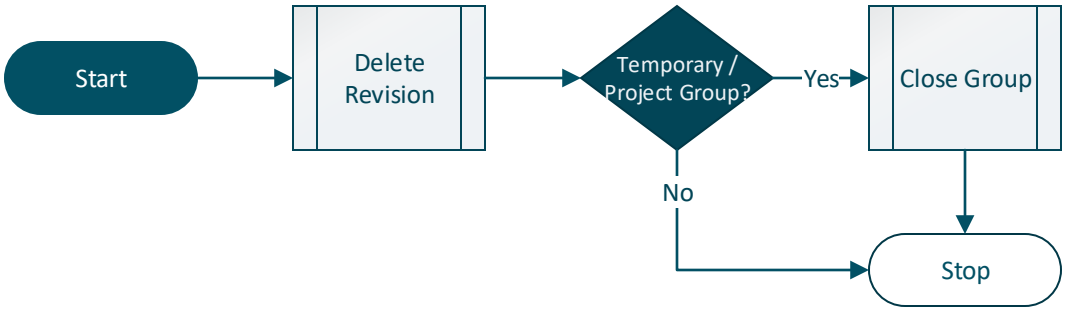
STAGE: Approve New Revision



Role Assignment:
- Engineering

License Requirements:

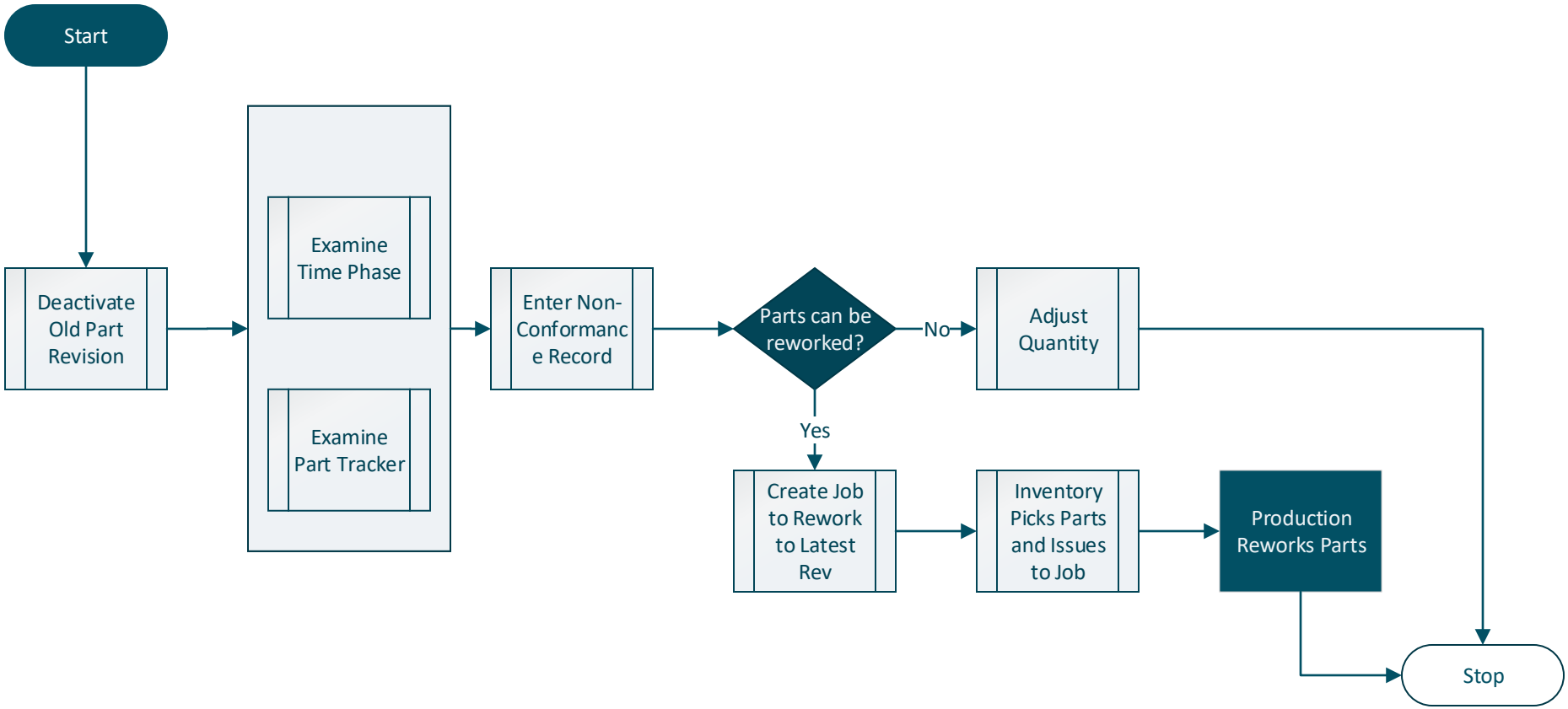
STAGE: Void ECO and Revision



Role Assignment:
- Engineering

License Requirements:

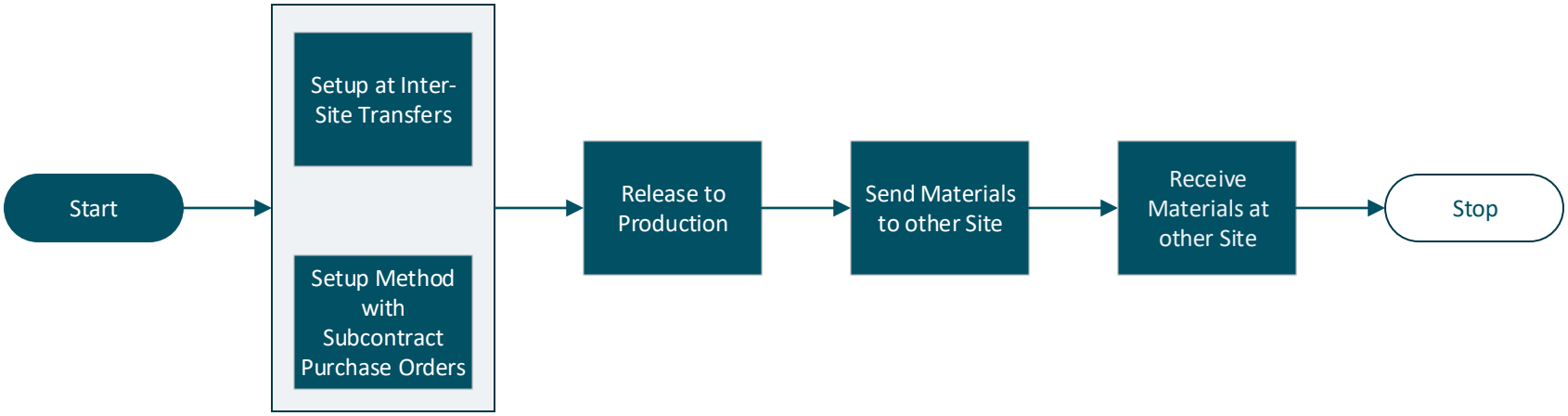
STAGE: Disposition Old Part Revision Inventory



Role Assignment:
- Engineering

License Requirements:

PROCESS: Parts Manufactured Across Sites



Role Assignment:
- Engineering/Production Planning / Scheduling

Notes: Use Subcontract Purchase orders if one Job required from beginning to end (no semi finished part numbers)

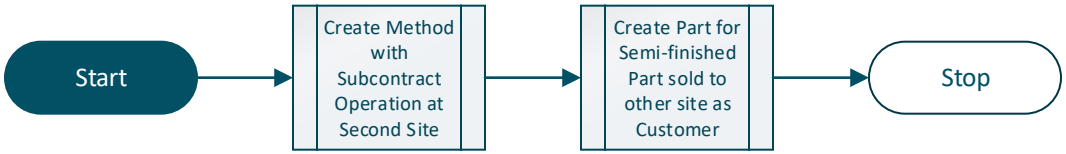
License Requirements:

STAGE: Setup as Inter-Site Transfers

Role Assignment:
- Engineering / Production Planning

License Requirements:

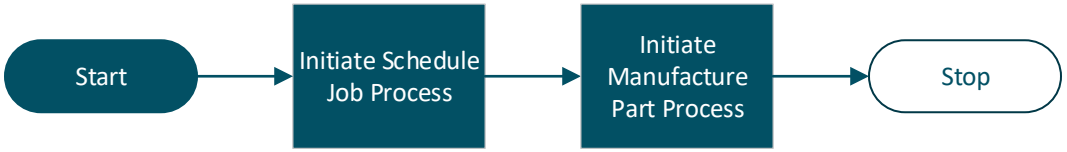
STAGE: Setup Method with Subcontract Purchase Orders



Role Assignment:
- Engineering / Production Planning

License Requirements:

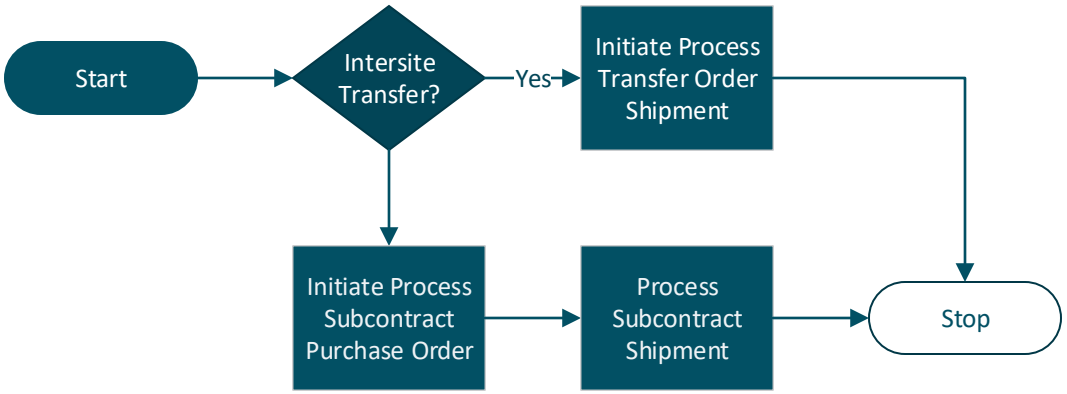
STAGE: Release to Production



Role Assignment:
- Production / Production Planning

License Requirements:

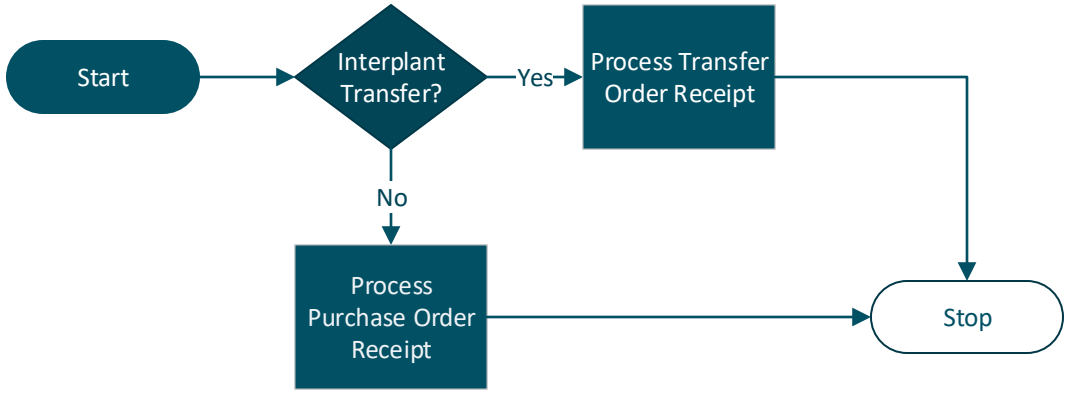
STAGE: Send Materials to other Site



Role Assignment:
- Shipping and Receiving

License Requirements:

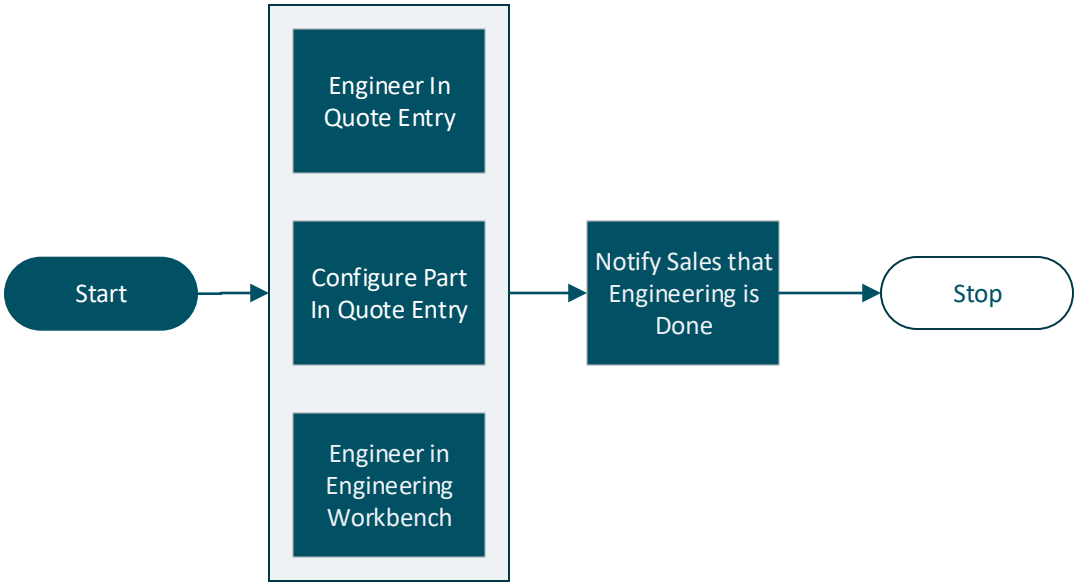
STAGE: Receive Materials from other Site



Role Assignment:
- Shipping and Receiving

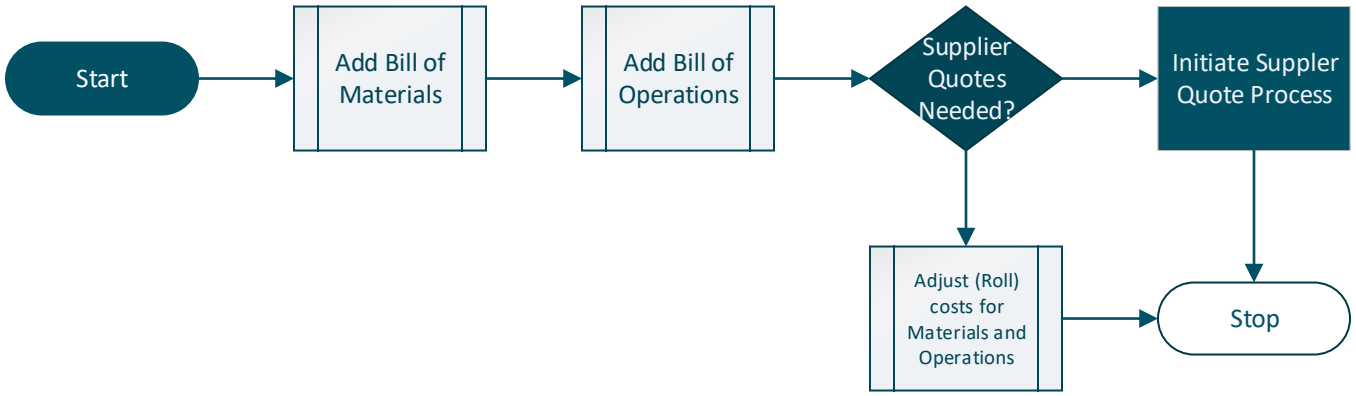
License Requirements:

PROCESS: Engineer Quote



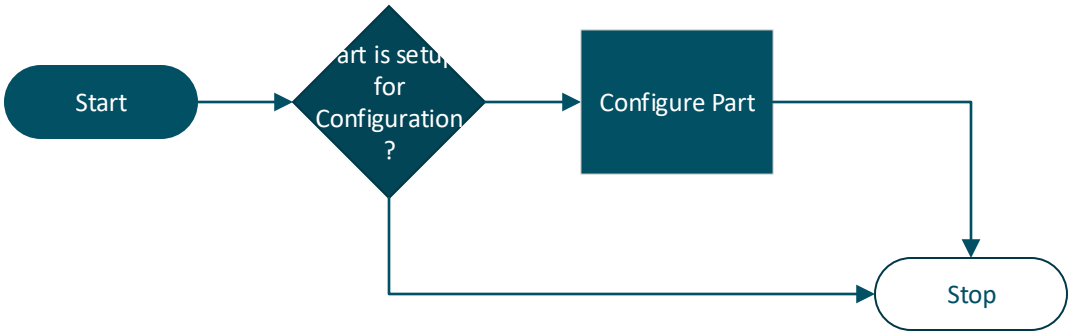
Role Assignment:
- Engineering

License Requirements:



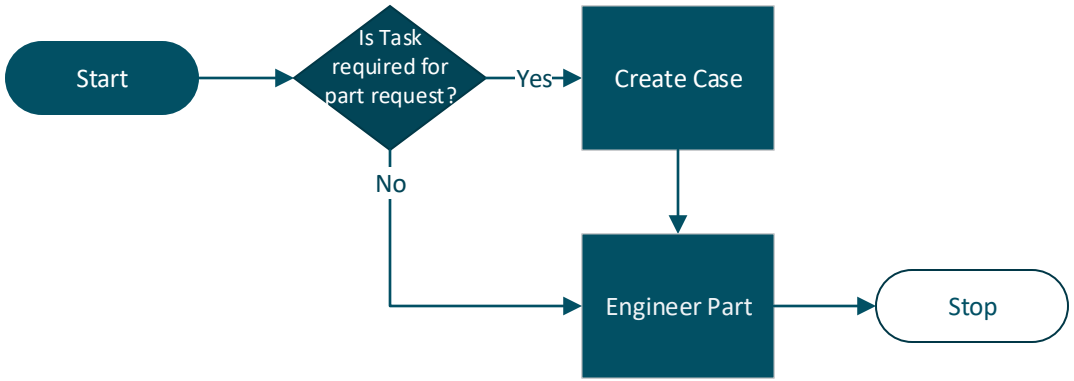
Role Assignment:
- Engineering

License Requirements:



Role Assignment:
- Engineering

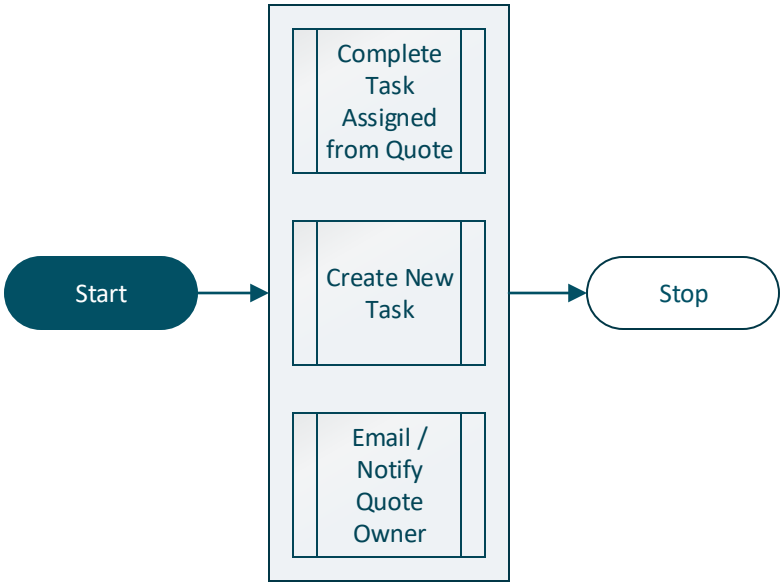
License Requirements:



Role Assignment:
- Sales / Engineering

License Requirements:

STAGE: Notify Sales that Engineering is Done



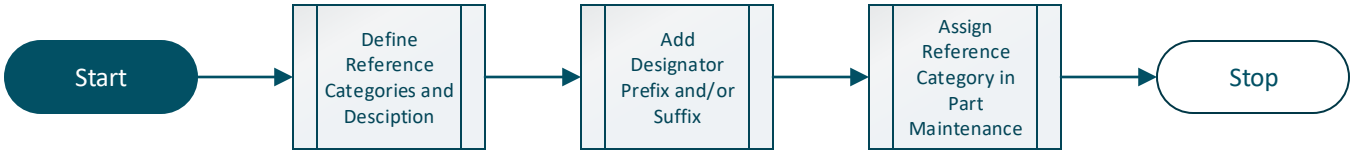
Role Assignment:
- Engineering

License Requirements:

Role Assignment:
- Engineering

License Requirements:

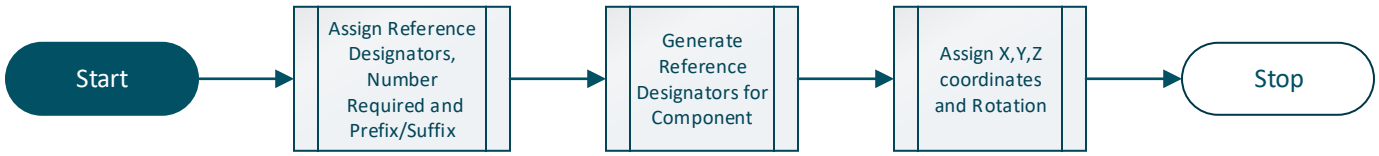
STAGE: Define Reference Categories



Role Assignment:
- Engineering

License Requirements:

STAGE: Define Reference Designators per Part Method



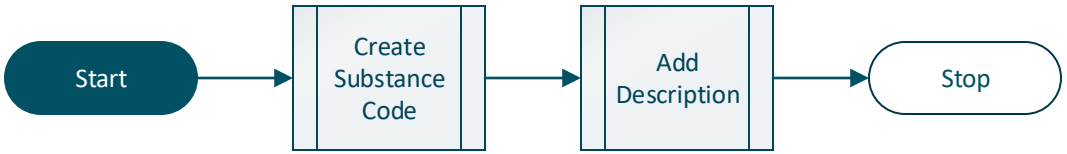
Role Assignment:
- Engineering

License Requirements:

PROCESS: RoHS Setup

Role Assignment:
- Engineering

License Requirements:



Role Assignment:
- Engineering

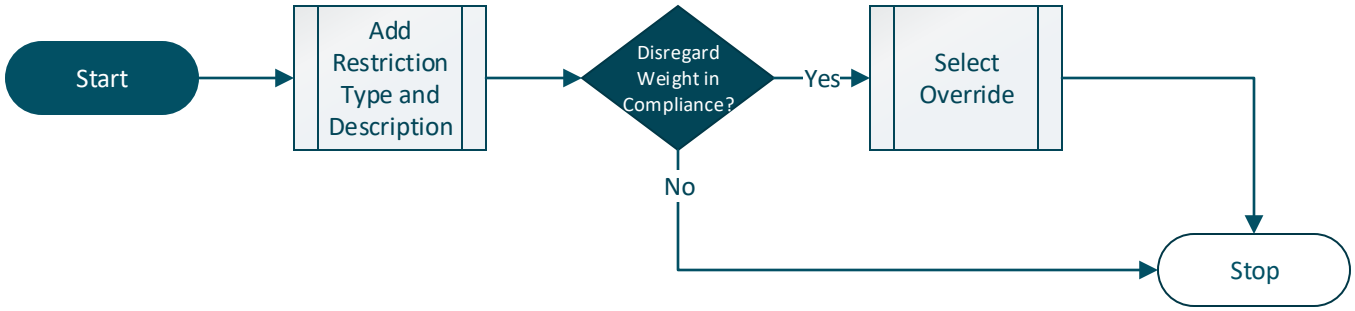
License Requirements:

Role Assignment:
- Engineering

License Requirements:

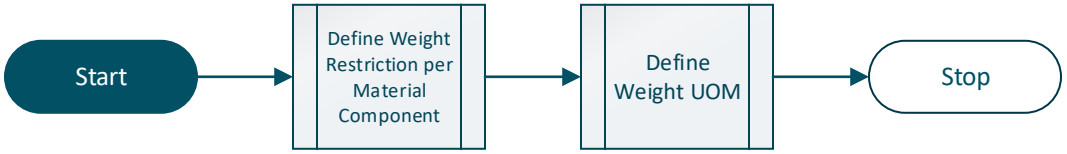
Role Assignment:
- Engineering

License Requirements:



Role Assignment:
- Engineering

License Requirements:



Role Assignment:
- Engineering

License Requirements:

Role Assignment:
- Engineering

License Requirements:

Configurator

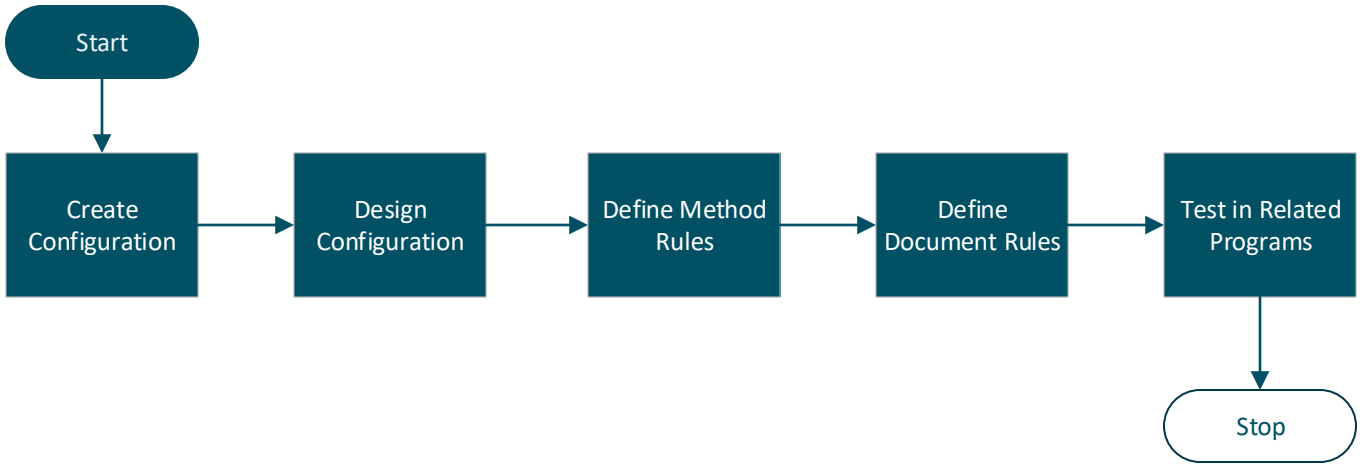
FUNCTION MENU

ENGINEERING MENU

Create Configuration

Configure Part

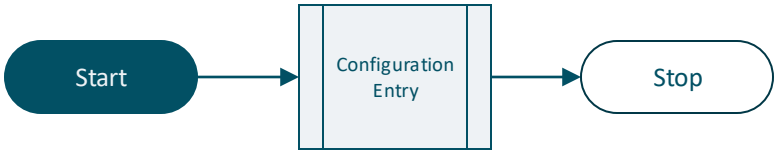
PROCESS: Create Configuration



Role Assignment:
- Engineering

License Requirements:

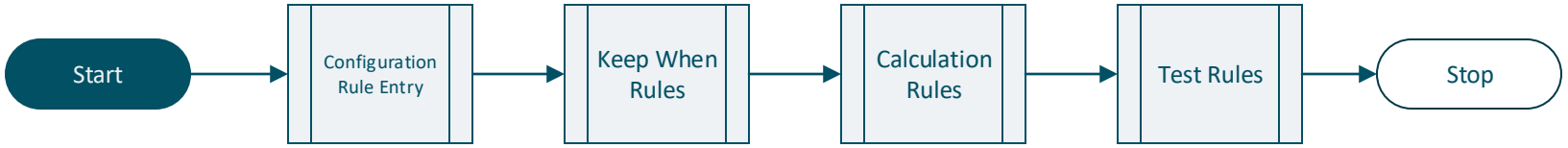
STAGE: Create Configuration



Role Assignment:
- Engineering

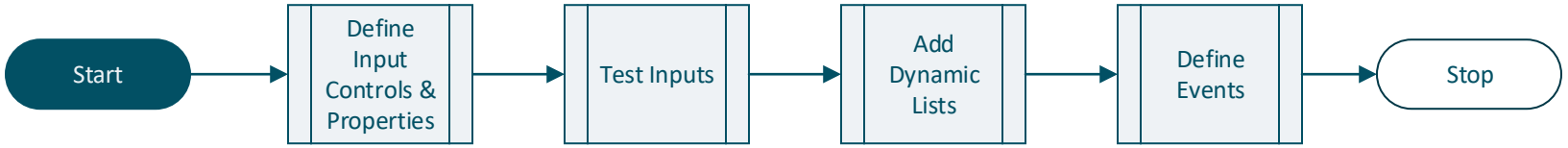
License Requirements:

STAGE: Define Method Rules



Role Assignment:
- Engineering

License Requirements:



Role Assignment:
- Engineering

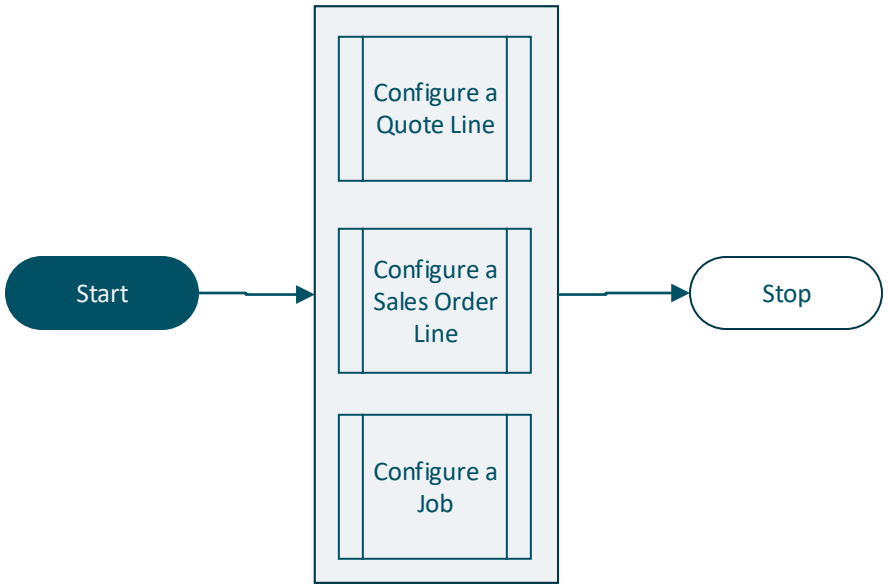
License Requirements:

STAGE: Define Document Rules

Role Assignment:
- Engineering

License Requirements:

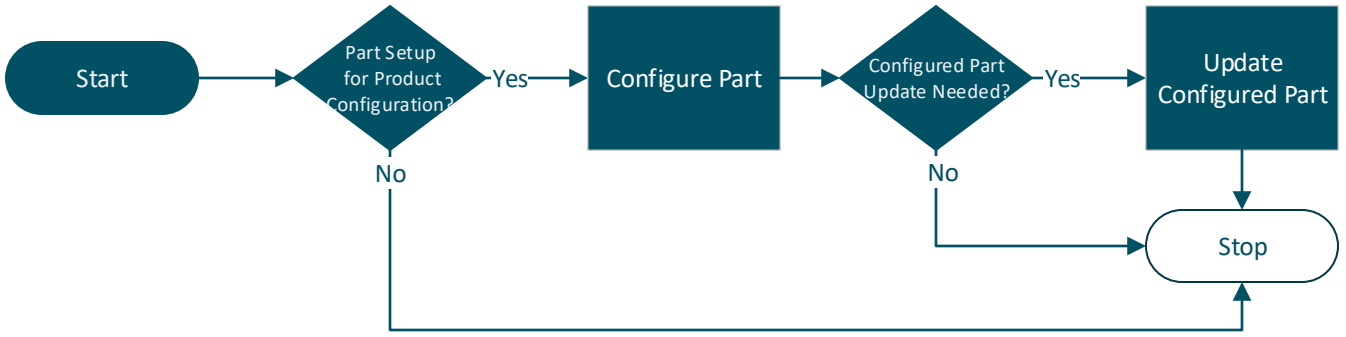
STAGE: Test in Related Programs



Role Assignment:
- Engineering

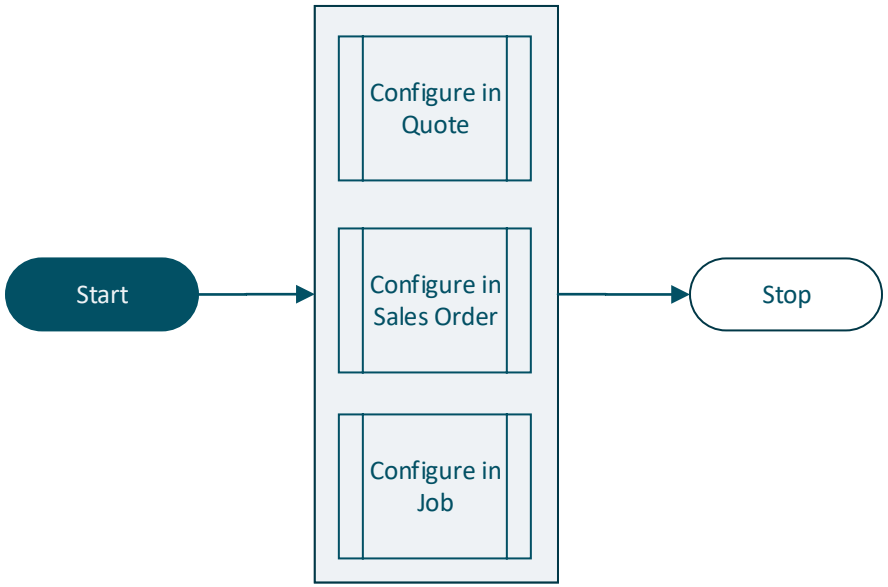
License Requirements:

PROCESS: Configure Part



Role Assignment:
- Customer Service, Sales, Production Manager

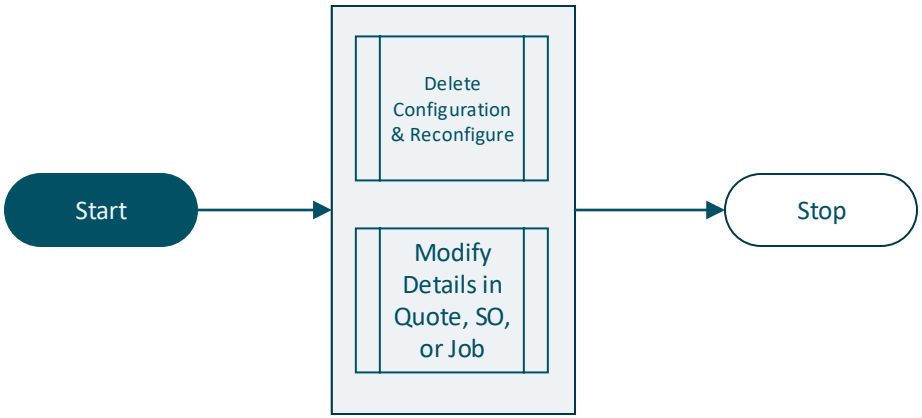
License Requirement:



Role Assignment:
- Customer Service, Sales, Production Manager

License Requirements:

STAGE: Update Configured Part



Role Assignment:
- Customer Service, Sales, Production Manager

License Requirements:

Planning

FUNCTION MENU

CONFIGURATOR MENU

MRP Overview

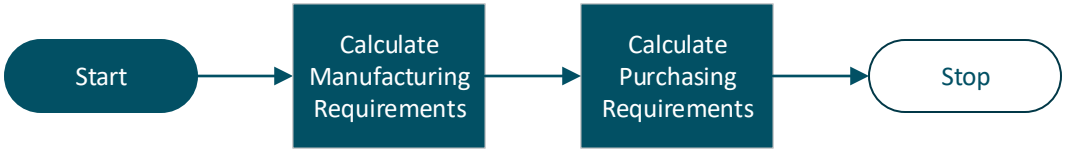
Forecast Creation

Process MRP Suggestions

Production Demand to Close

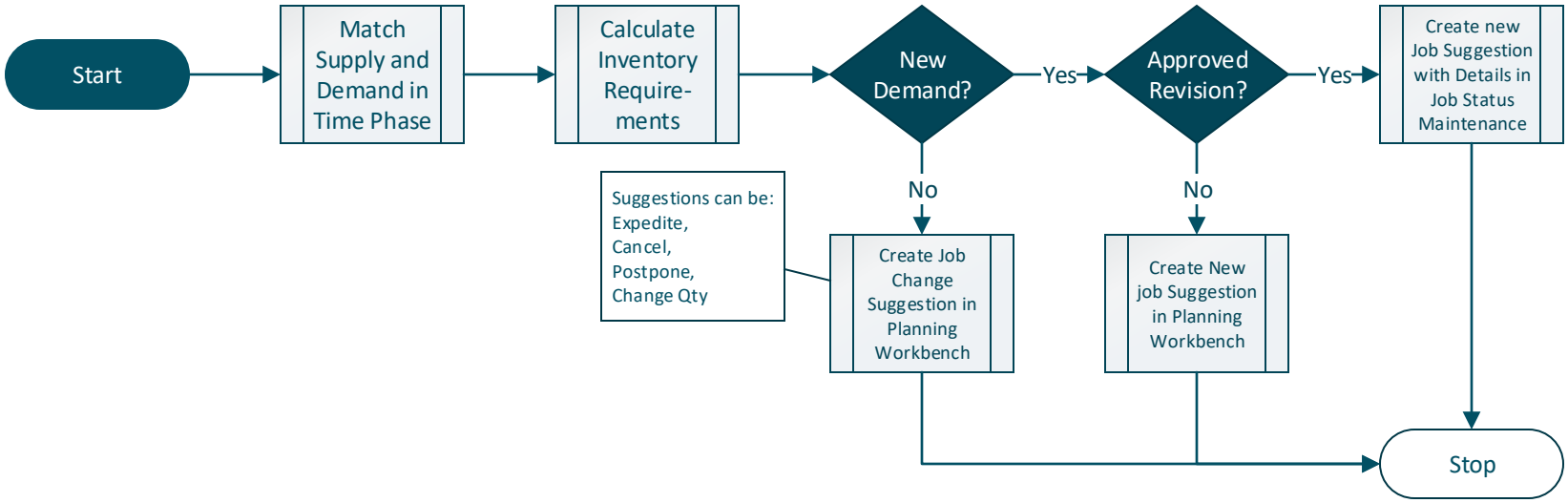
Create Job

PROCESS: MRP Overview



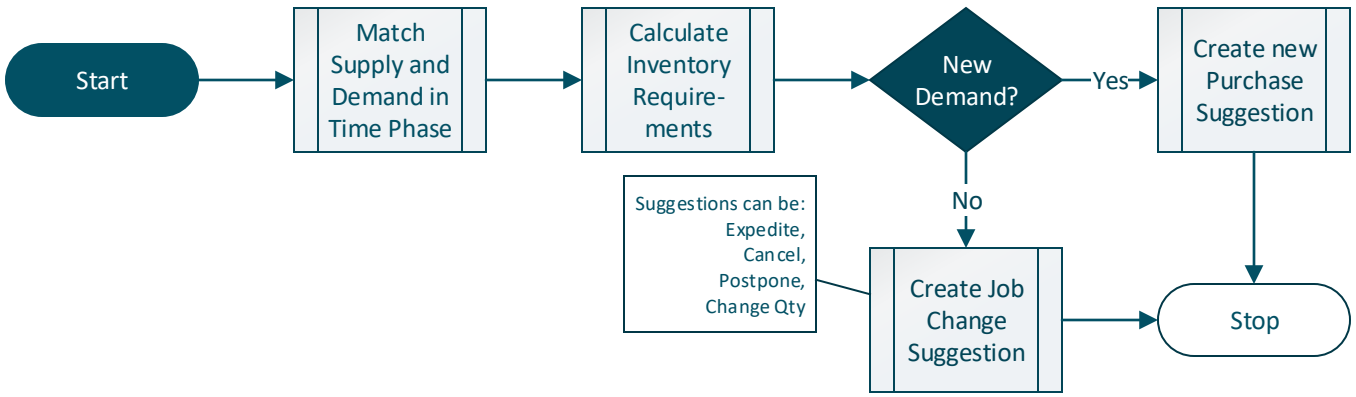
Role Assignment:
- Epicor System

License Requirements:



Role Assignment:
- Epicor System

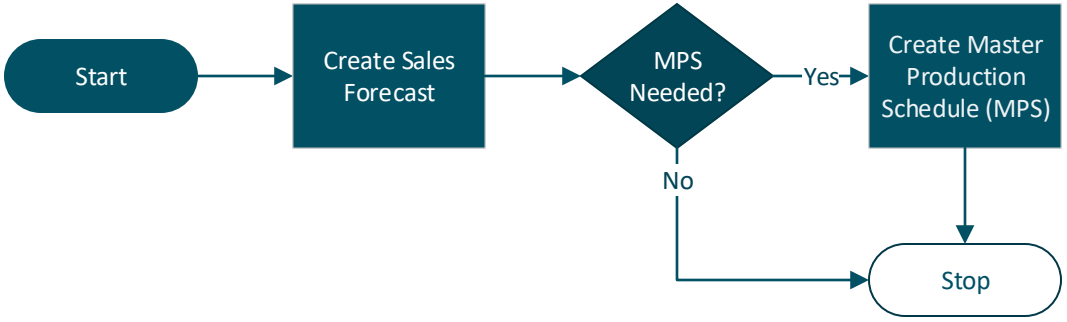
License Requirements:



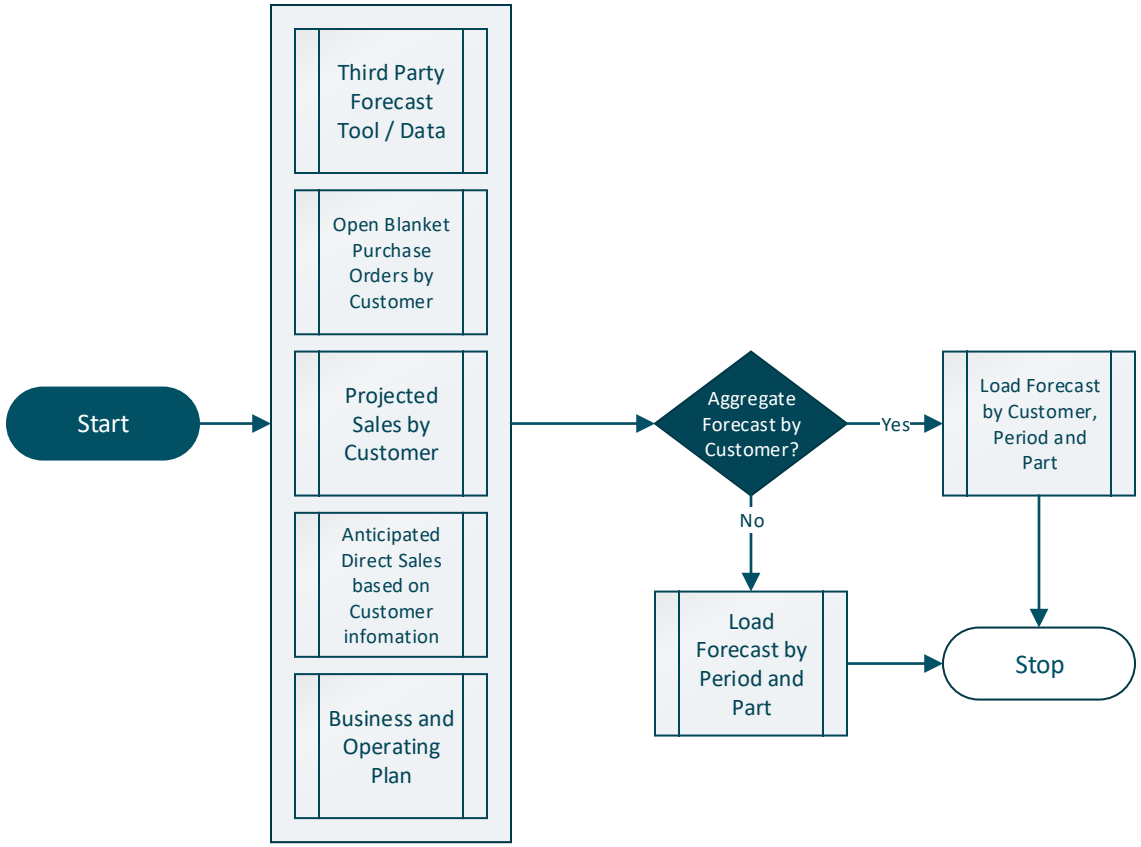
Role Assignment:
- Epicor System

License Requirements:

PROCESS: Forecast Creation

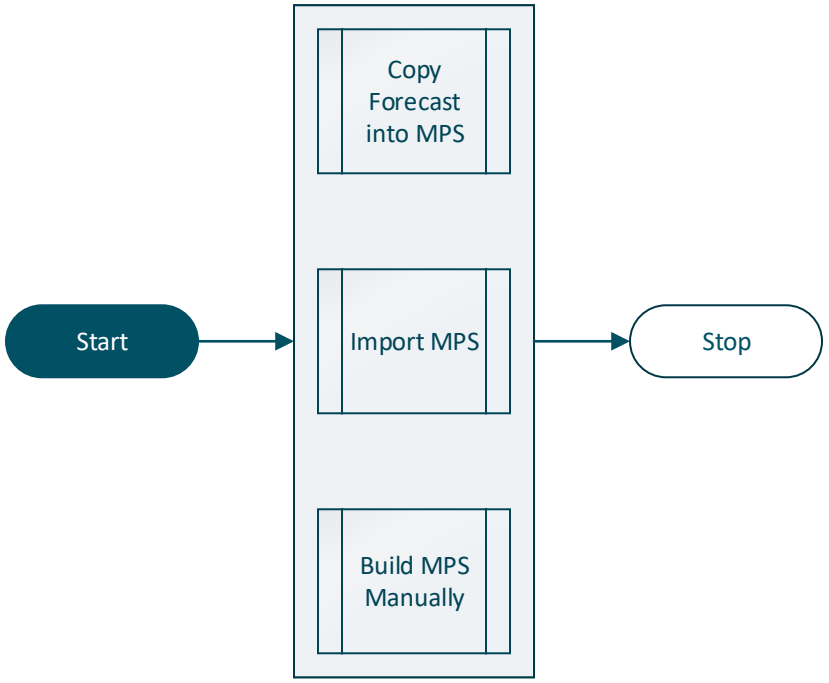


Role Assignment:
-Sales / Production Planning
Notes: If a Part has a Sales Forecast and MPS, MRP uses the MPS for it's calculations.
License Requirements:



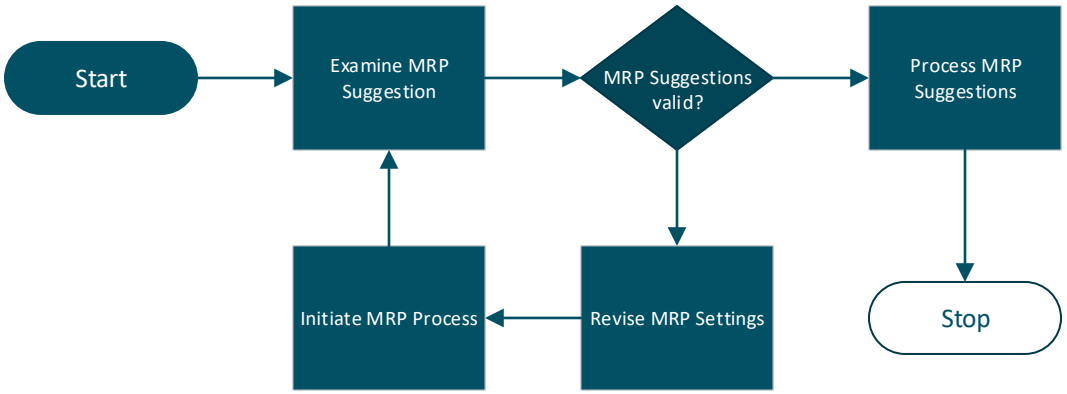
Role Assignment:
-Sales
License Requirements:

STAGE: Create Master Production Schedule (MPS)



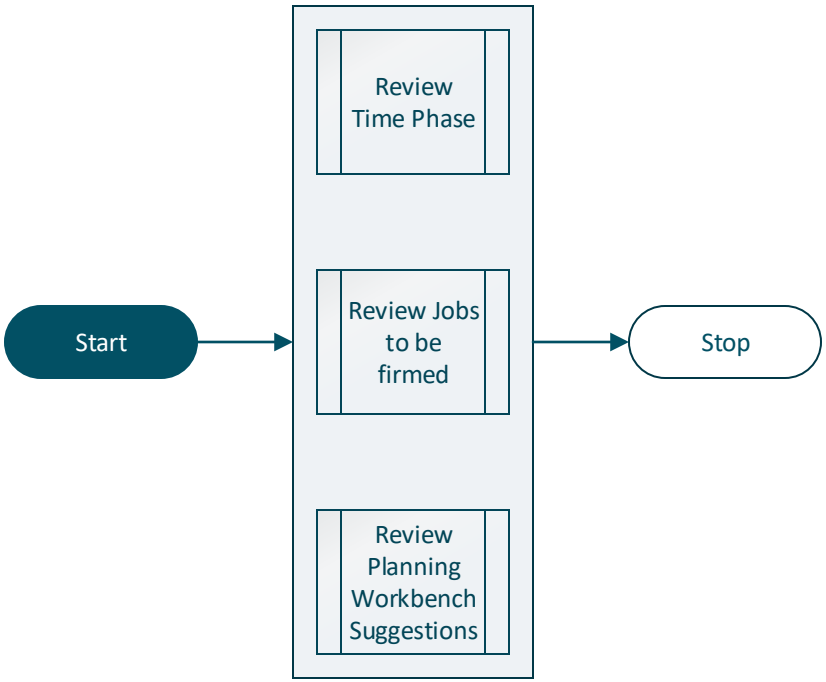
Role Assignment:
-Production Planning
License Requirements:

PROCESS: Process MRP Suggestions



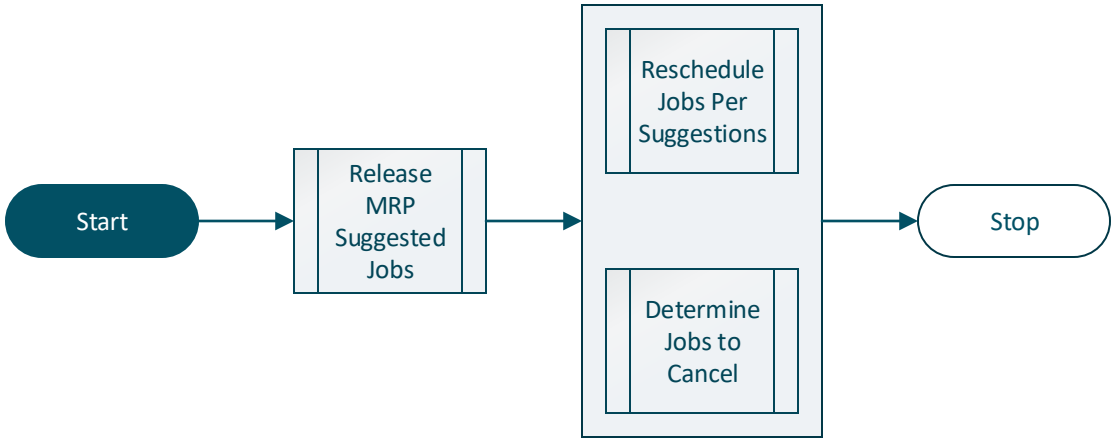
Role Assignment:
-Production Planning
License Requirements:

STAGE: Examine MRP Suggestions



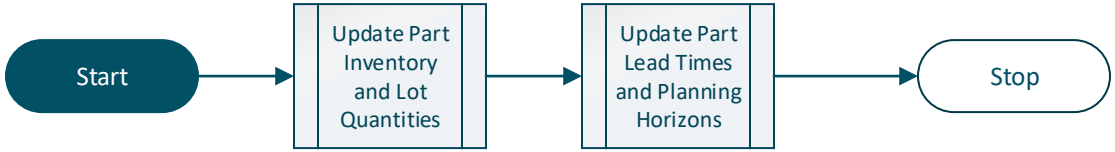
Role Assignment:
-Production Planning
License Requirements:

STAGE: Respond to Suggestions



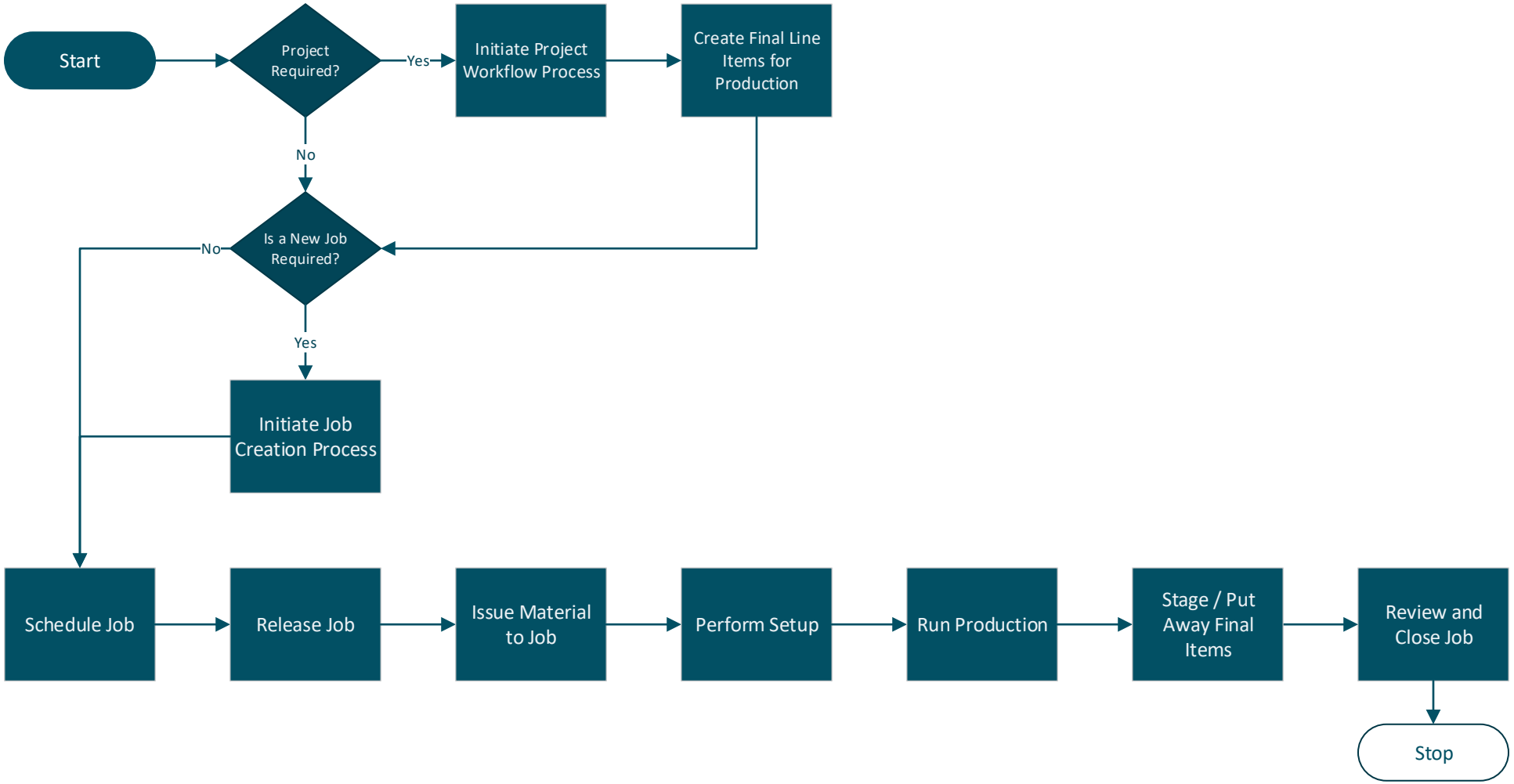
Role Assignment:
-Production Planning
License Requirements:

STAGE: Revise MRP Settings



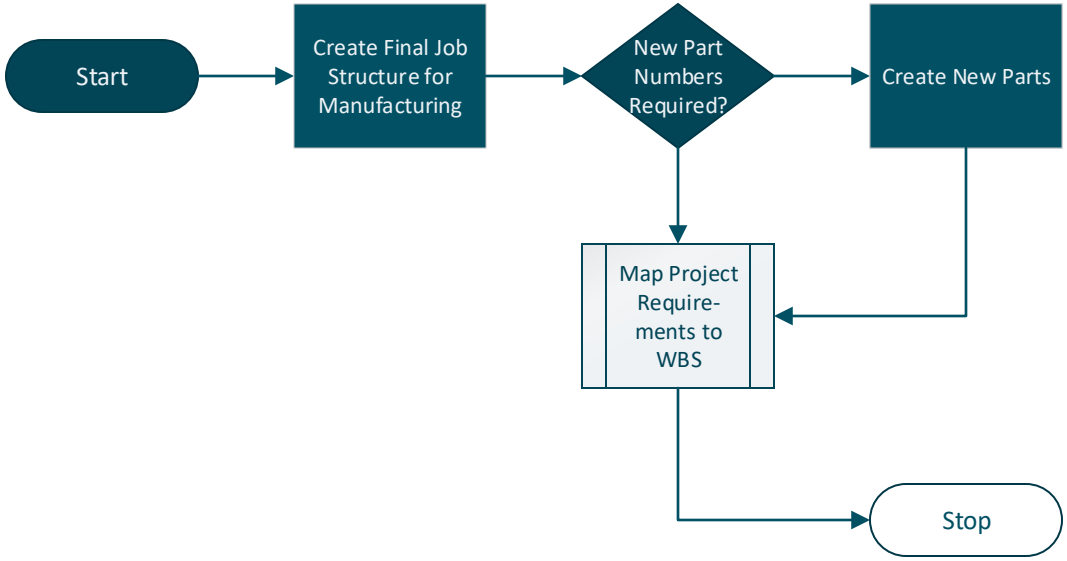
Role Assignment:
-Production Planning
License Requirements:

PROCESS: Production Demand to Close



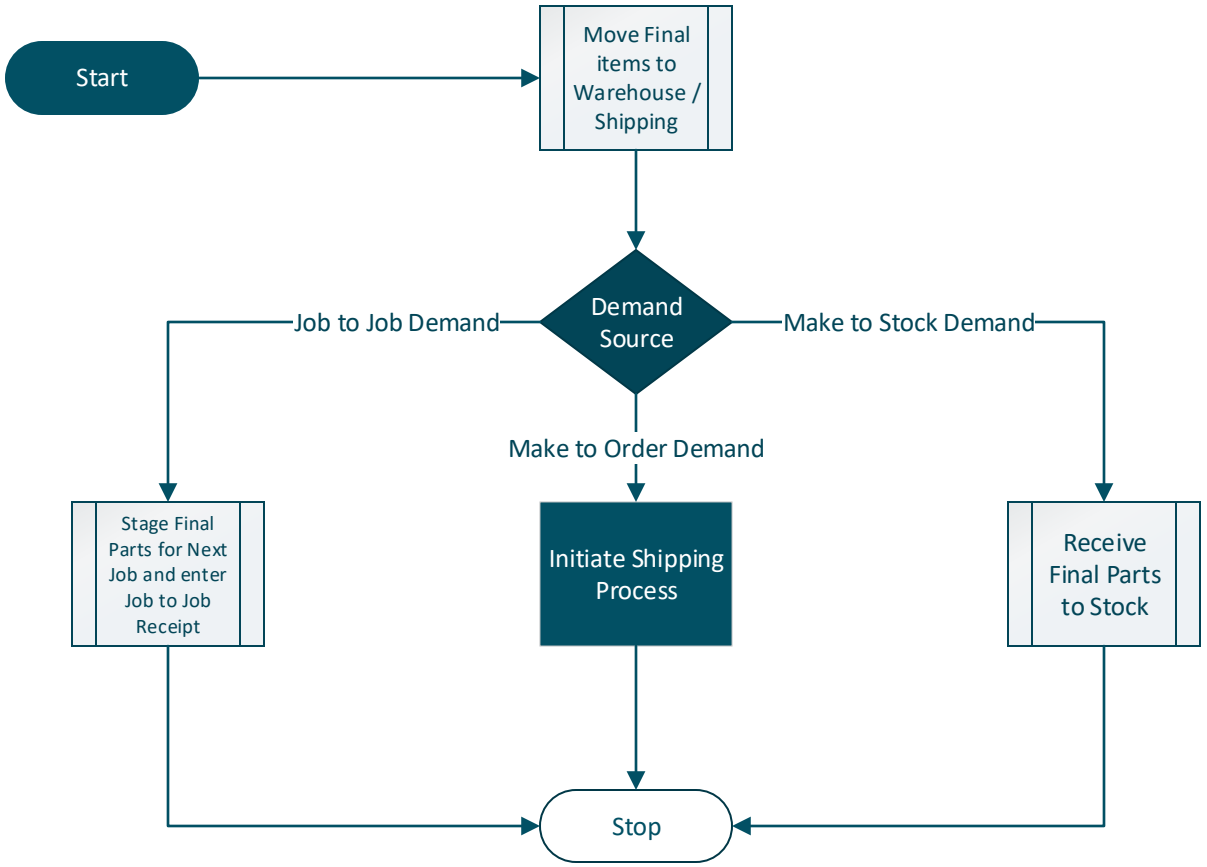
Role Assignment:
-Project Manager / Production Planning
License Requirements:

STAGE: Create Final Line Items for Final Production

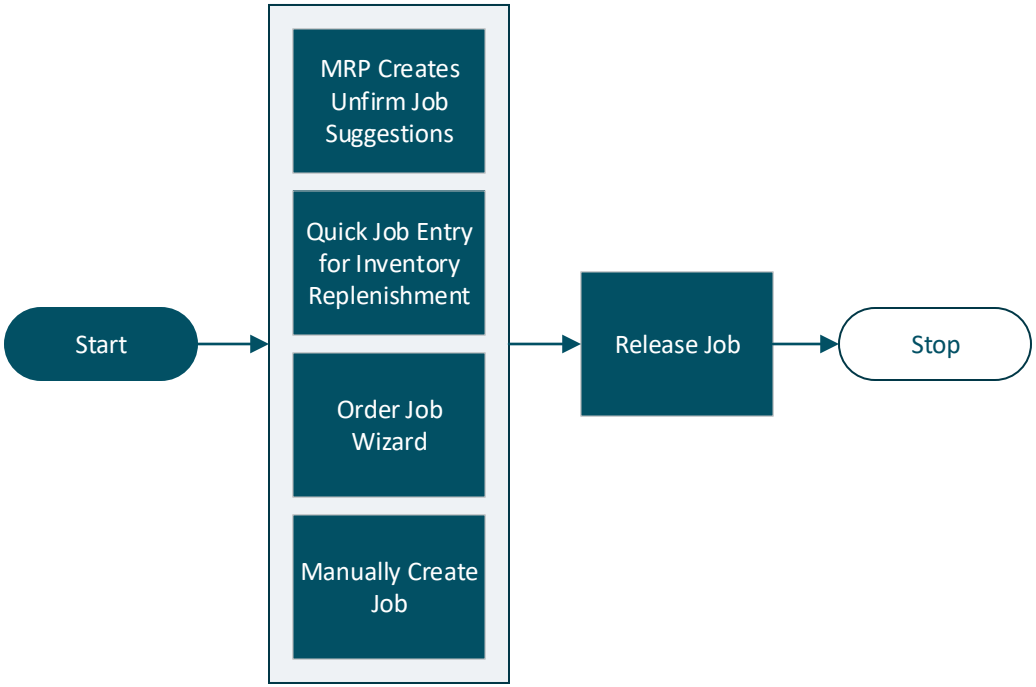


Role Assignment:
-Project Manager / Production Planning
License Requirements:

STAGE: Stage / Put Away Final Items

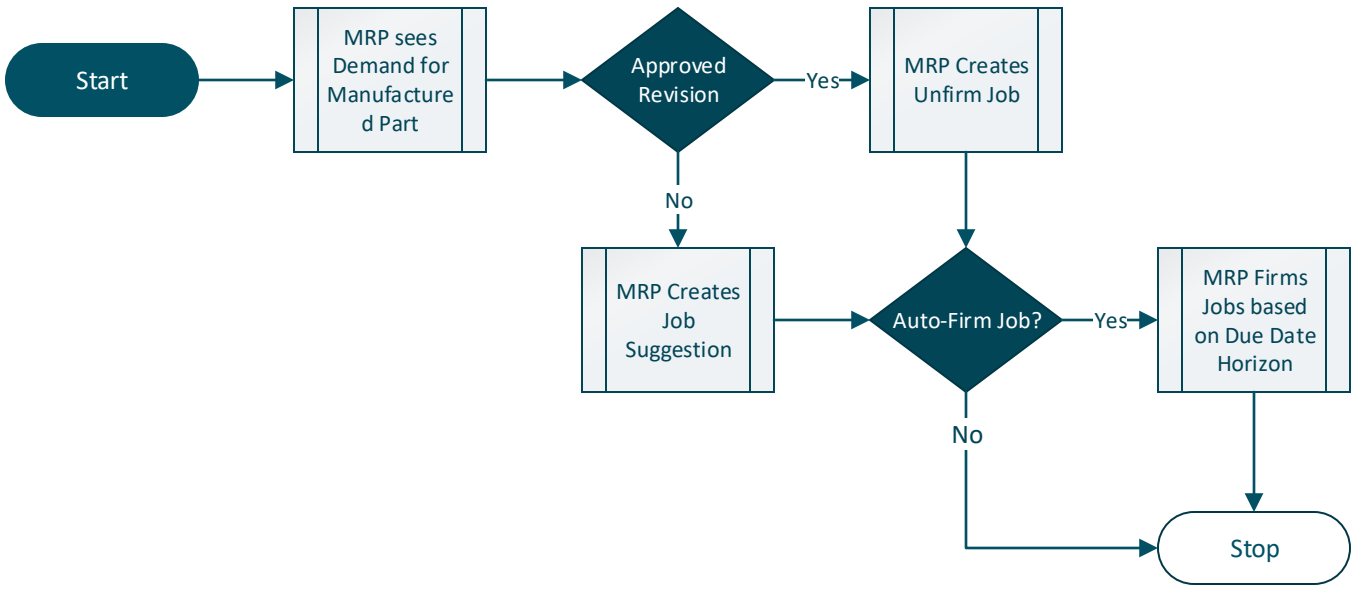


Role Assignment:
-Production Operator
License Requirements:

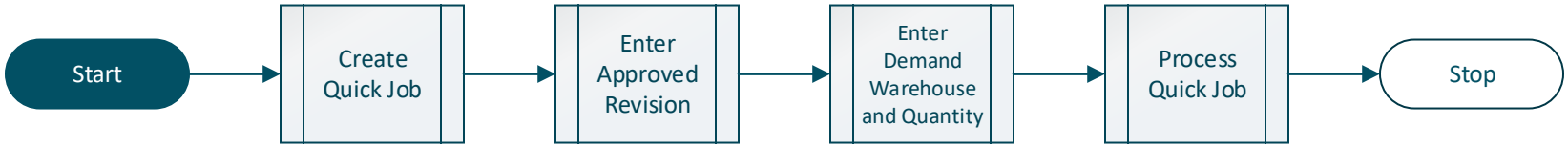


Role Assignment:
-Production Planning
License Requirements:

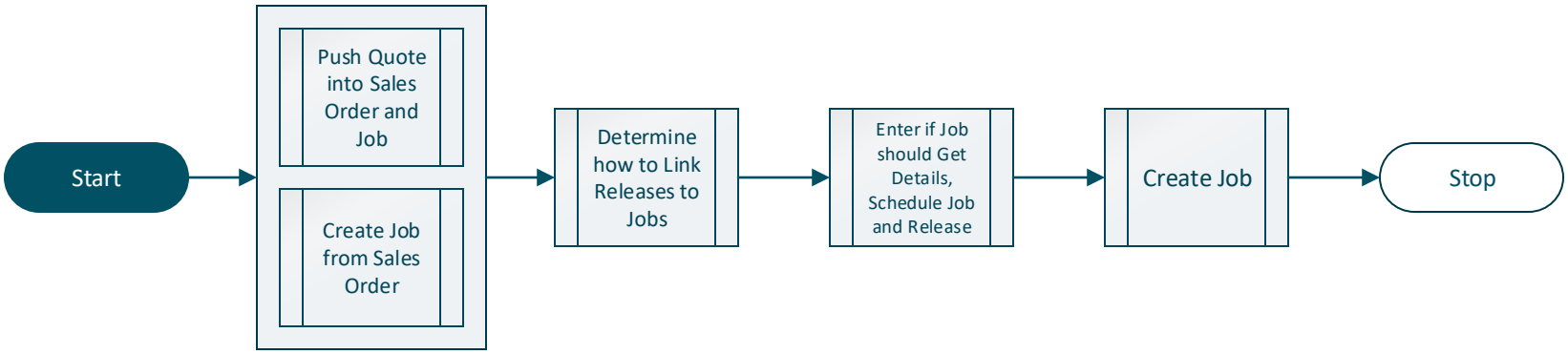
STAGE: MRP Creates Unfirm Job Suggestions



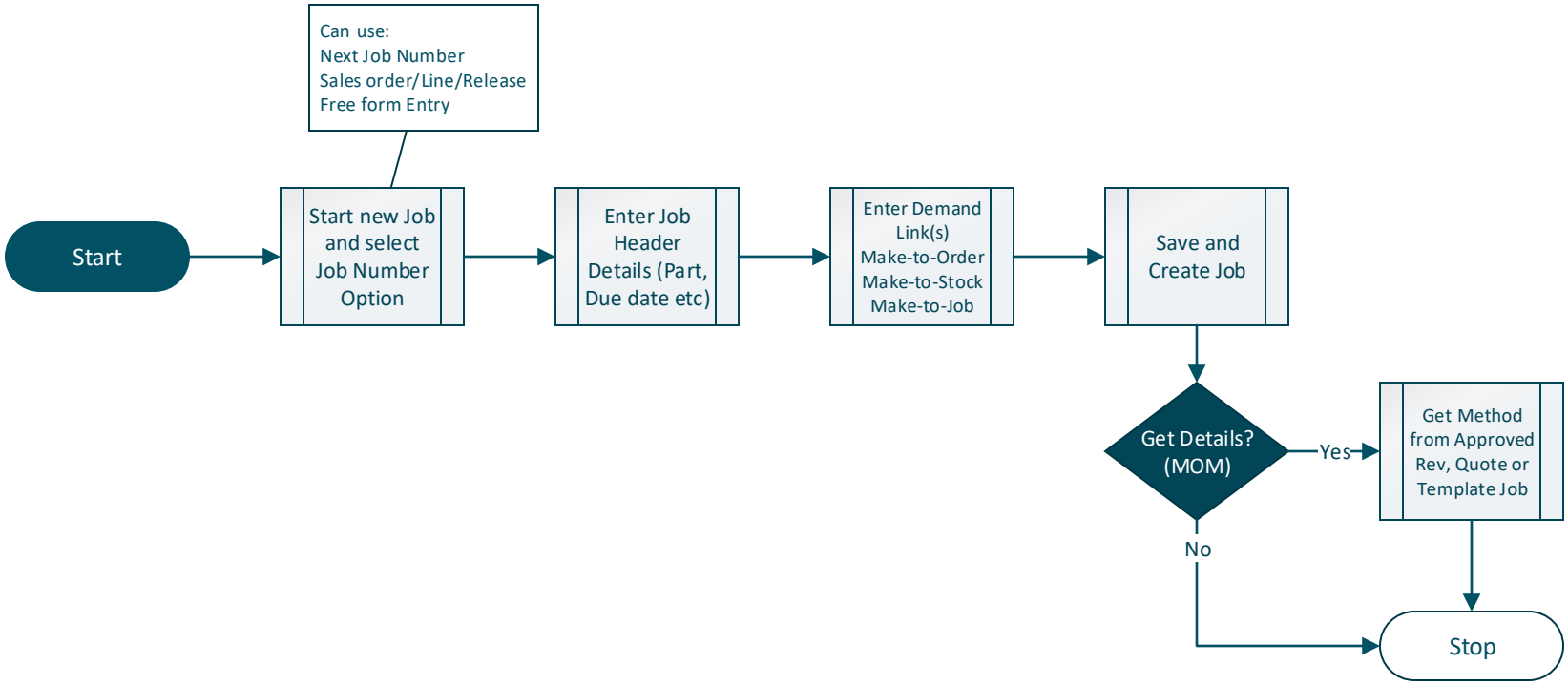
Role Assignment:
-Production Planning
License Requirements:



Role Assignment:
-Production Planning
License Requirements:

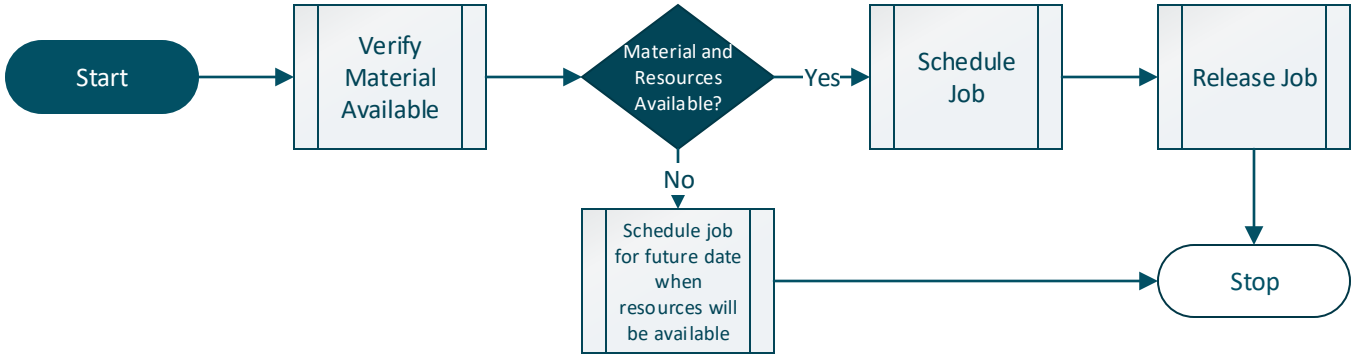


Role Assignment:
-Production Planning
License Requirements:



Role Assignment:
-Production Planning
License Requirements:

STAGE: Release Job

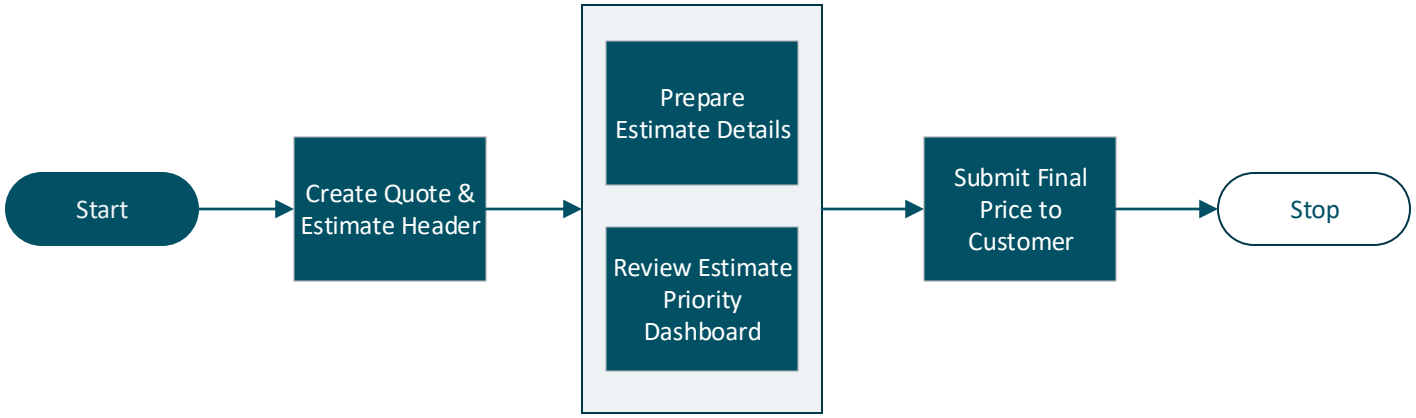


Role Assignment:
-Production Planning
License Requirements:

AEP Quote and Estimate Entry

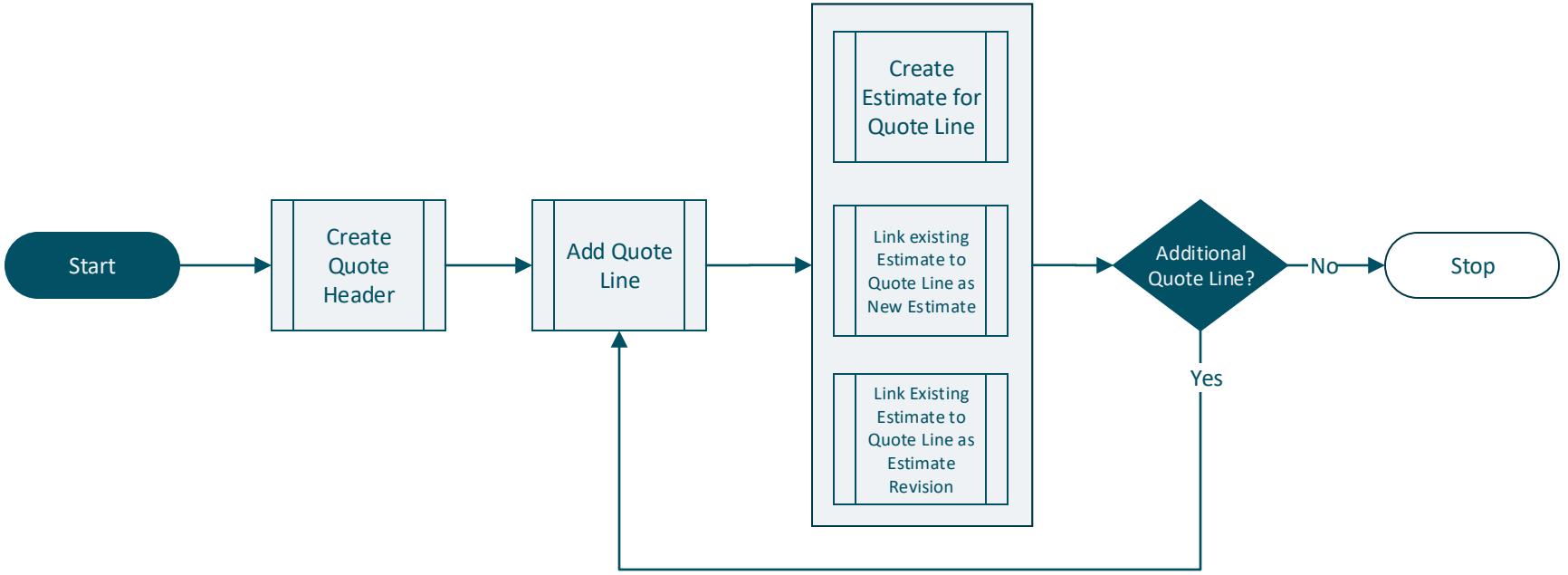
Prepare Estimate Detail

Convert Quote to Job



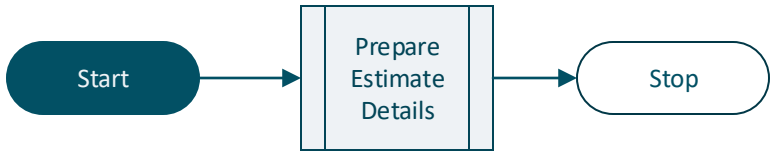
Role Assignment:
- Sales

License Requirements:



Role Assignment:
- Sales

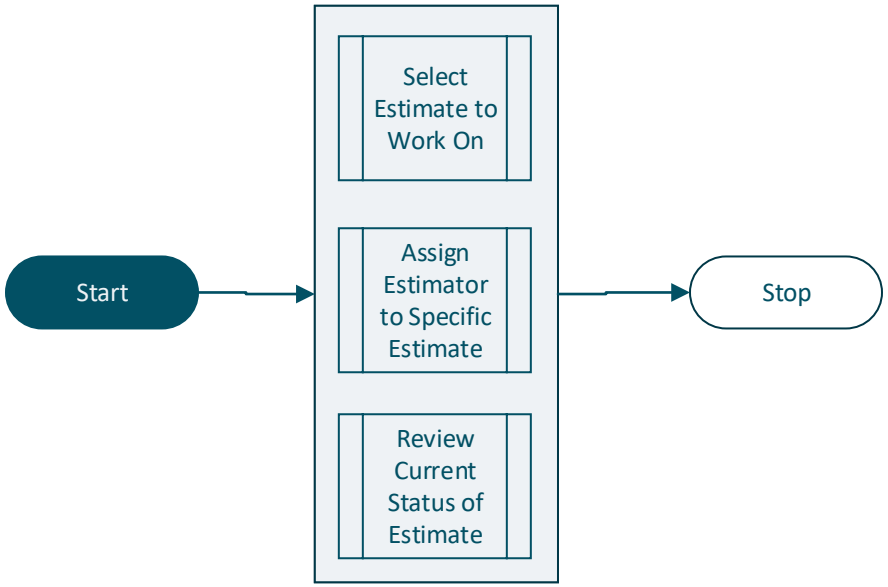
License Requirements:



Role Assignment:
- Estimating

License Requirements:

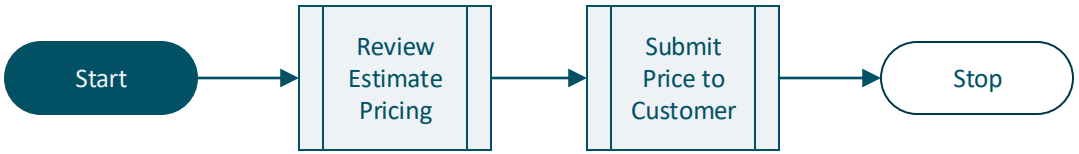
STAGE: Review Estimate Priority Dashboard



Role Assignment:
- Estimating, Sales

License Requirements:

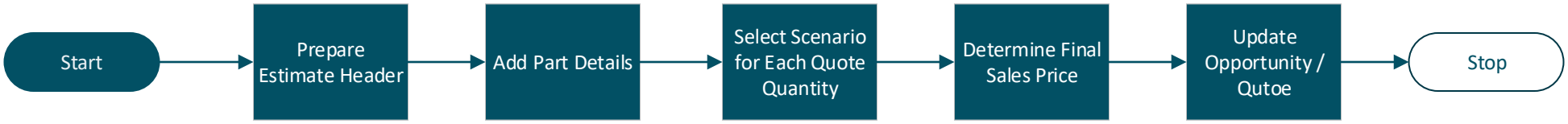
STAGE: Submit Final Price to Customer



Role Assignment:
- Sales

License Requirements:

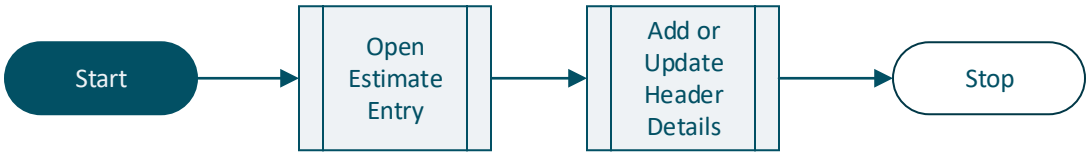
PROCESS: Prepare Estimate Detail



Role Assignment:
- Estimating

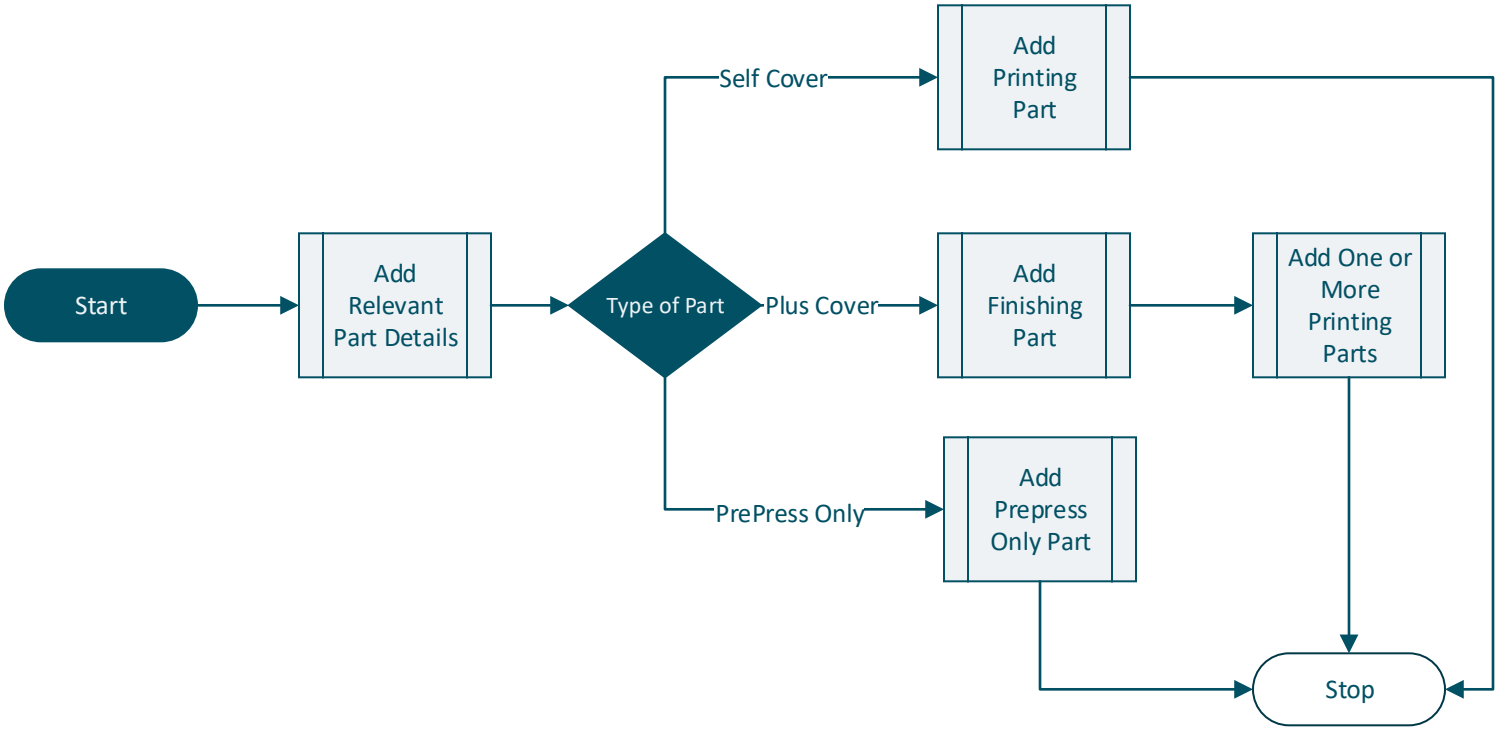
Note: Estimates can be created from an Opportunity/Quote or as a freestanding Estimate without a Quote

License Requirements:



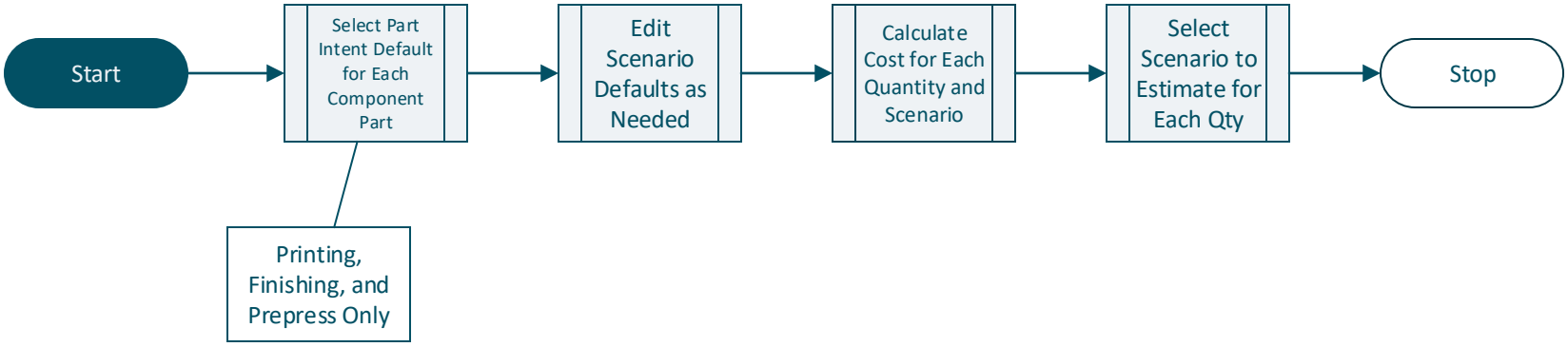
Role Assignment:
- Estimating

License Requirements:



Role Assignment:
- Estimating

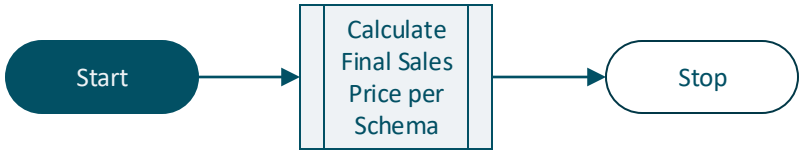
License Requirements:



Role Assignment:
- Estimating

Note: Part Intent Defaults include details such as size, paper stock, inks and bind options: Scenario Defaults include the various Press, plating and binding equipment options
Final Selection allows estimator to Quote a short run on Digital Press, medium run on sheetfed and long run on web press

License Requirements:



Role Assignment:
- Estimating

License Requirements:

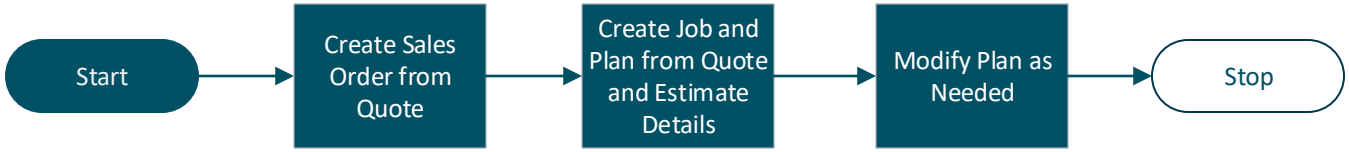
STAGE: Update Opportunity / Quote

Role Assignment:
- Estimating

Note: Required if want to use Capable to Promise to estimate delivery date with Epicor Scheduling: You can select to export a 24 page text section as 1-8 and 1-16 subassembly or as 1 combined Subassembly or as a single subassembly with both page counts in one subassembly

License Requirements:

PROCESS: Convert Quote with Estimate to Job



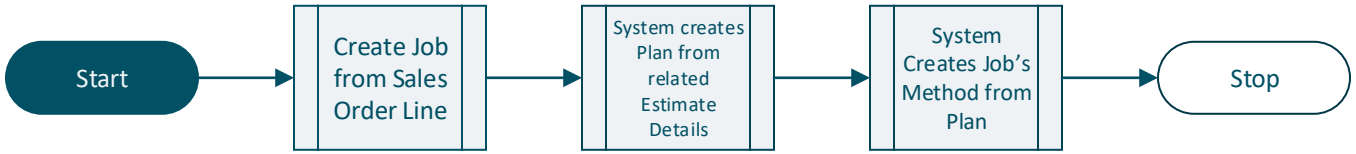
Role Assignment:
- Sales, Project Manager / Contracts, Planner/Scheduler

Note: Modifying Plan can be used during initial Job Creation or during changes through the life of the Job

License Requirements:

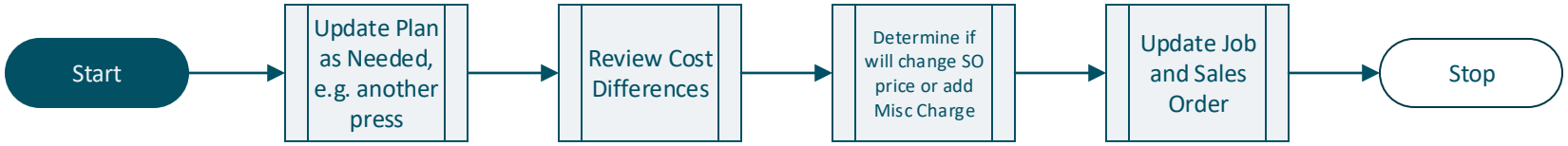
Role Assignment:
- Sales

License Requirements:



Role Assignment:
- Project Manager / Contracts

License Requirements:



Role Assignment:
- Planner / Scheduler

License Requirements:

Job Scheduling

Manufacture Part

MES Clock In and Job Activity

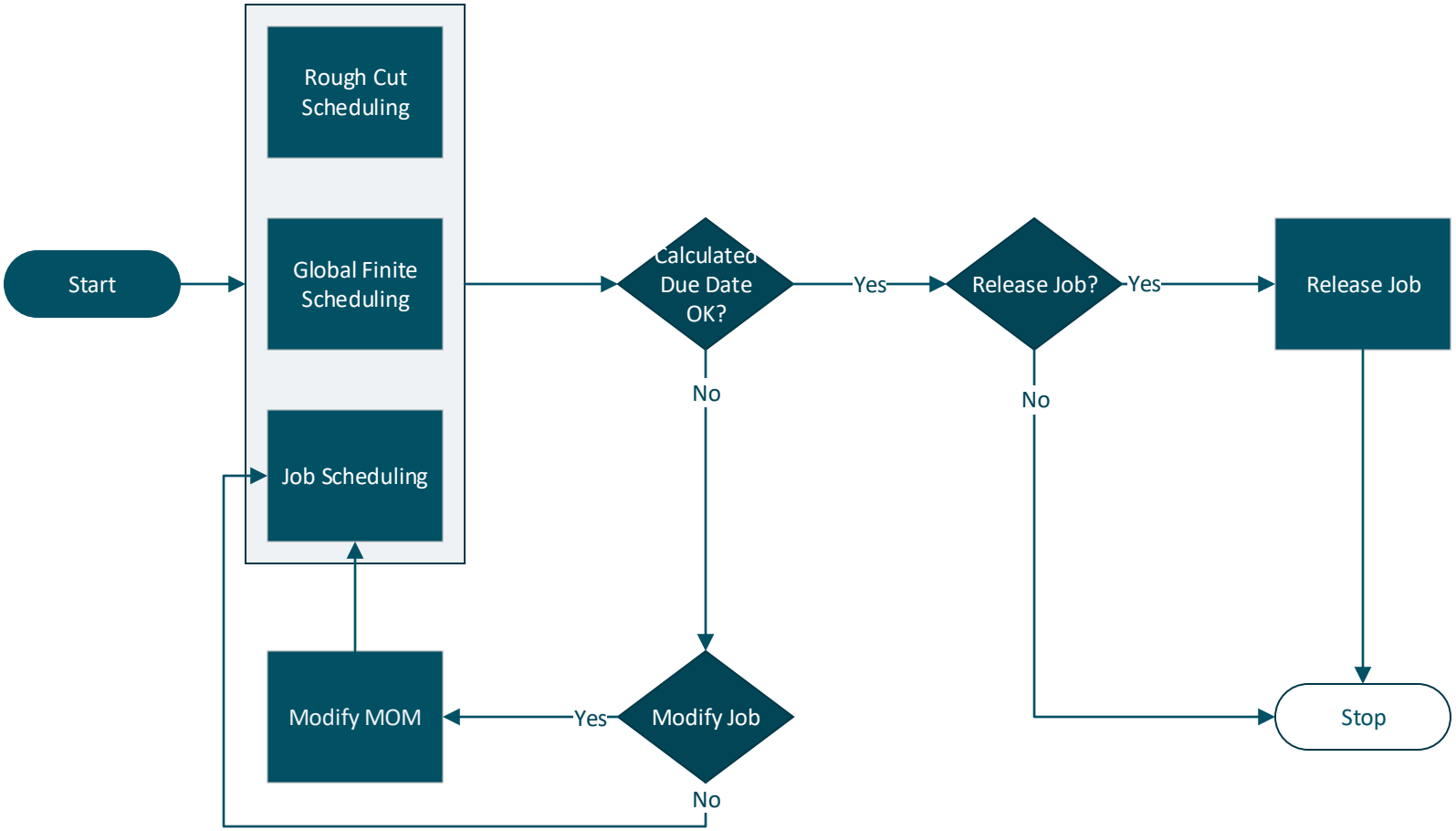
Manual Time Entry

Operations First Article Inspection

RMA Rework Request

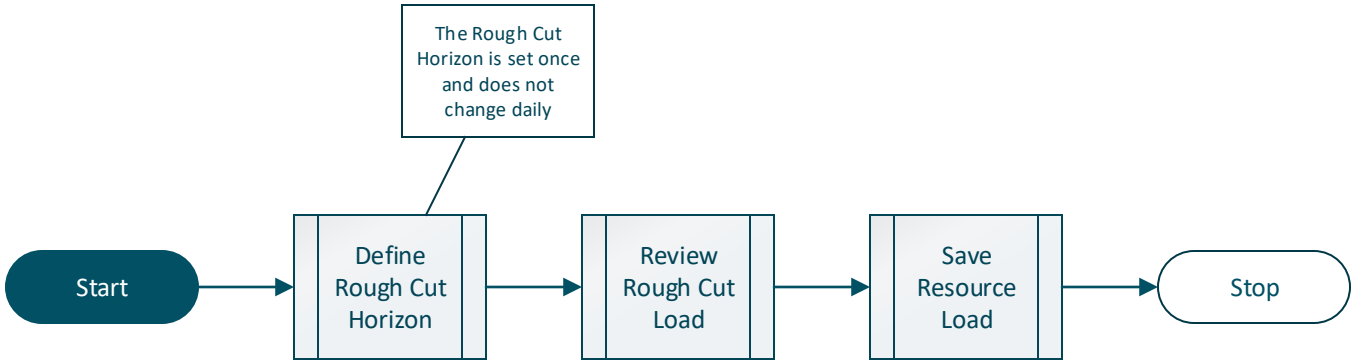
Non Conformance Entry

PROCESS: Job Scheduling



Role Assignment:
- Production Planner

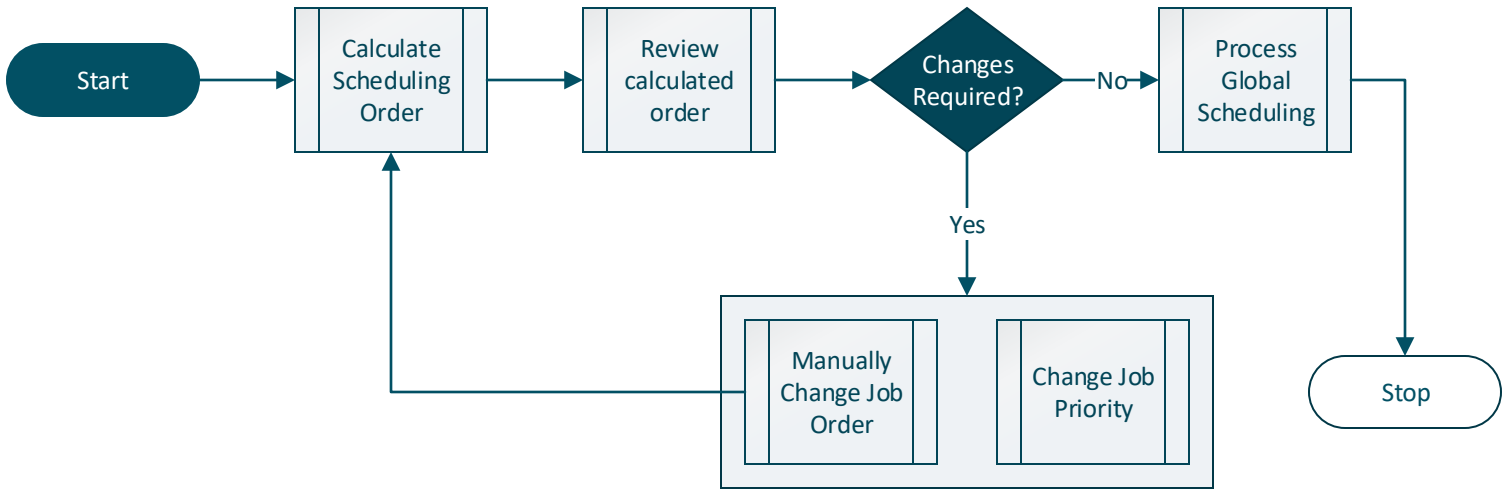
License Requirements:



Role Assignment:
- Production Planner

Notes: Rough Cut Scheduling ignores resource and shop load records that are normally included within the scheduling calculation. Every job that is scheduled past the horizon value ignores the resource and shop load records. To add the Shop Load for the Rough Cut Scheduled jobs, use Save Resource Load.

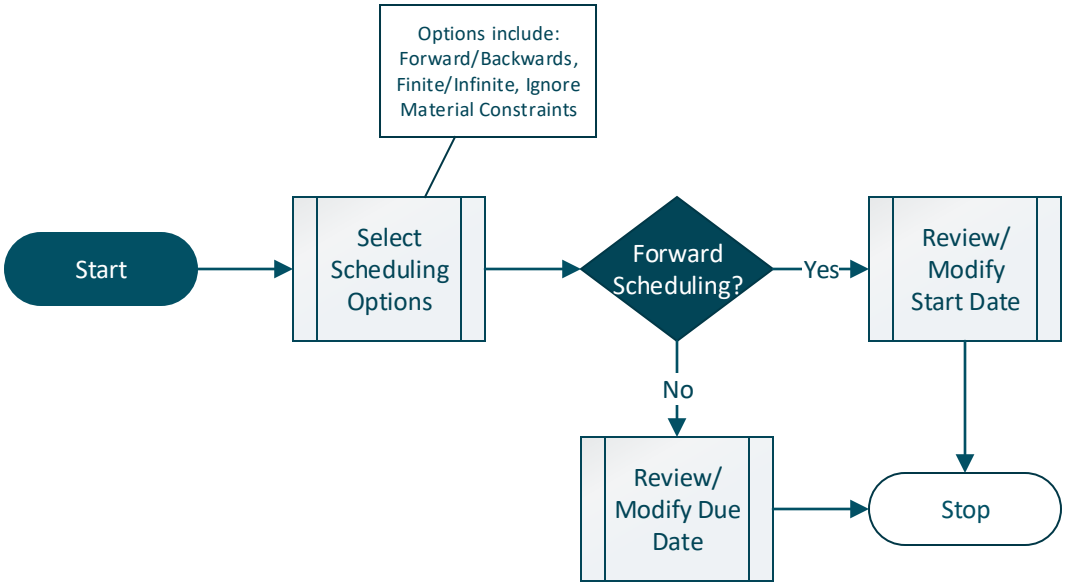
License Requirements:



Role Assignment:
- Production Planner

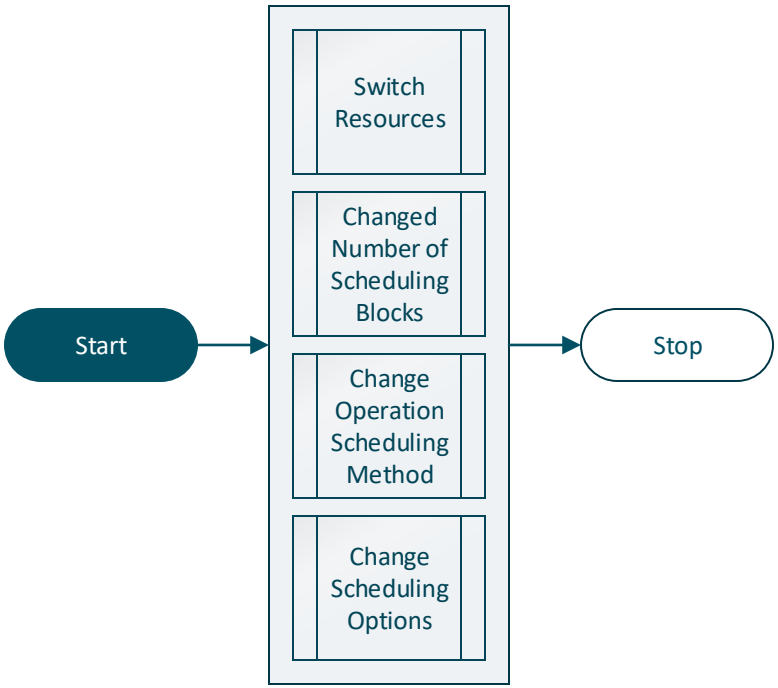
Notes: Jobs can be locked if you do not want Global Scheduling to change their schedule

License Requirements:



Role Assignment:
- Production Planner

License Requirements:



Role Assignment:
- Production Planner

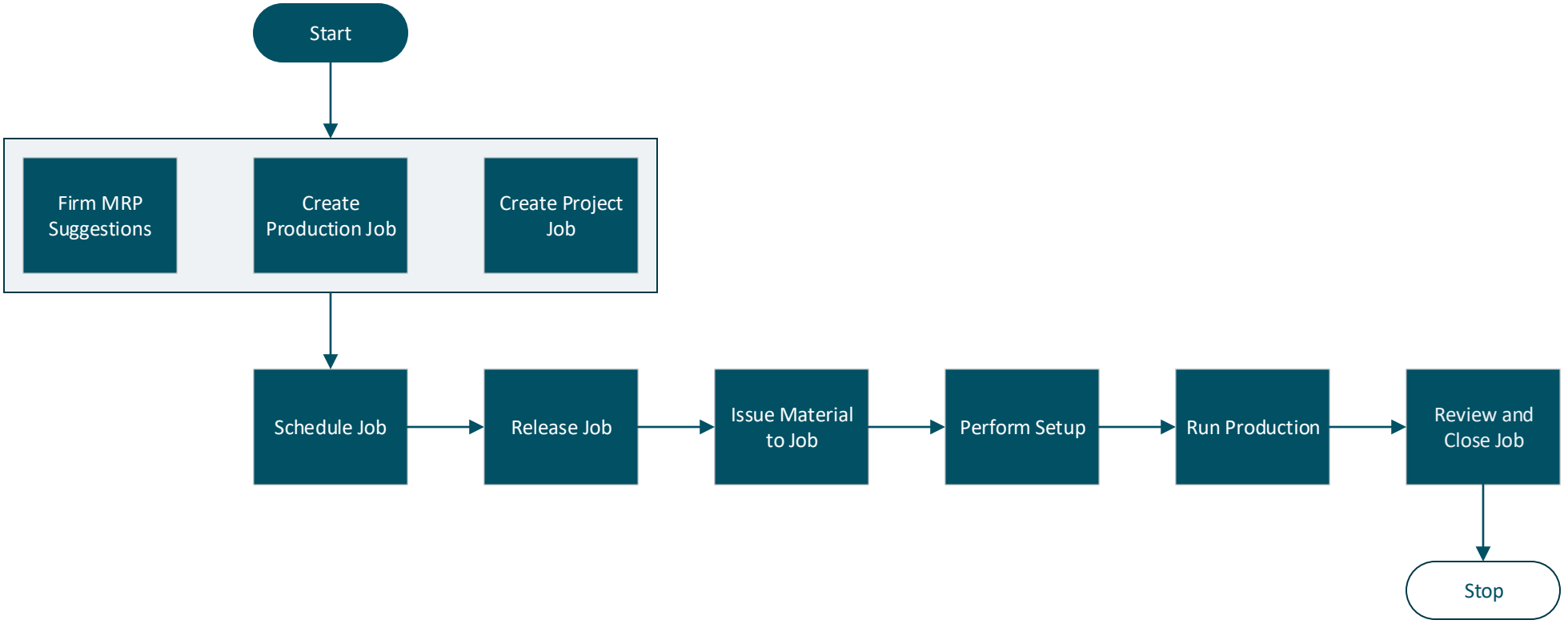
Notes: With the Advanced Planning & Scheduling module, Operations can be dragged from one Resource to another on the Multi-Resource Scheduling Board

License Requirements:

Role Assignment:
- Production Planner

Notes: With the Advanced Planning & Scheduling module, Operations can be dragged from one Resource to another on the Multi-Resource Scheduling Board

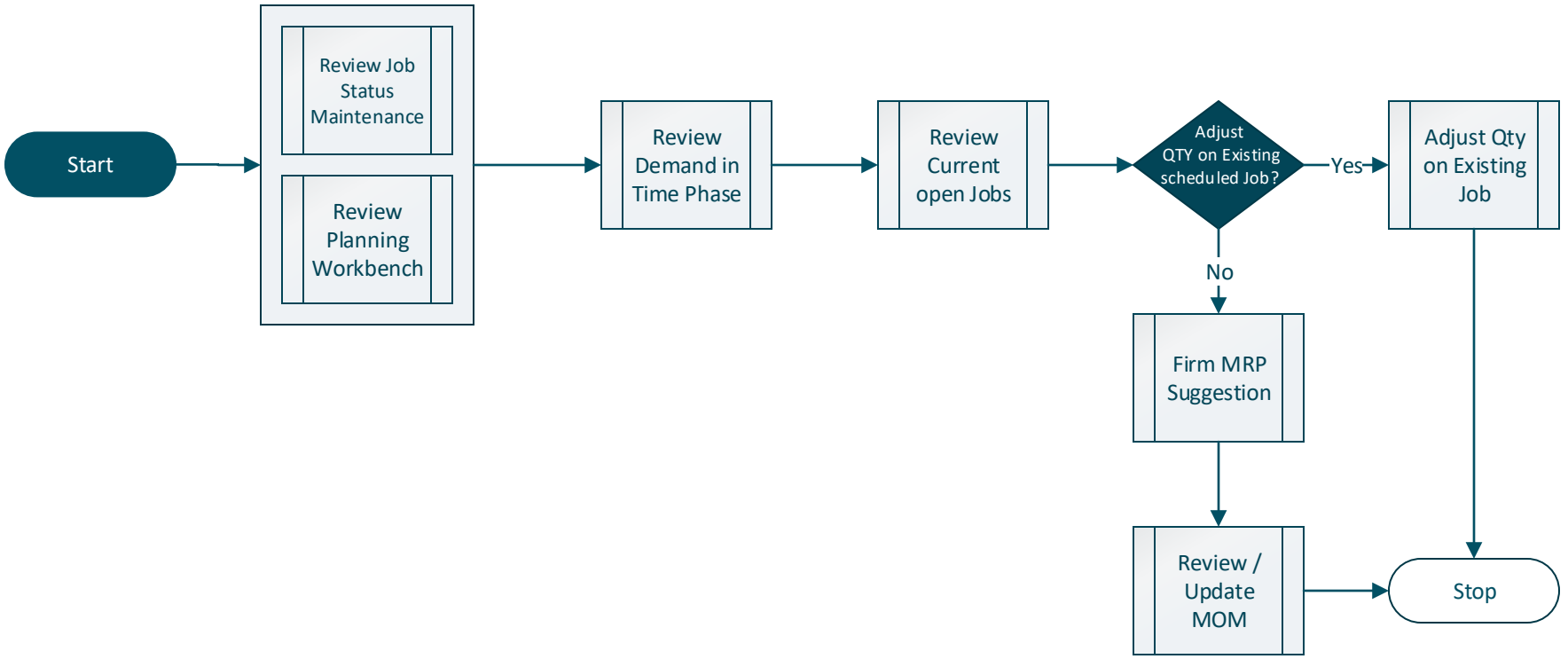
License Requirements:



Role Assignment:
- Production Planner, Inventory Control, Production Operator, Finance

License Requirements:

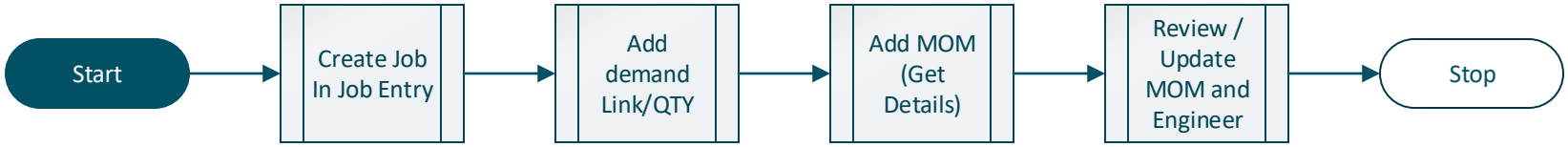
STAGE: Firm MRP Suggestion



Role Assignment:
- Production Planner

License Requirements:

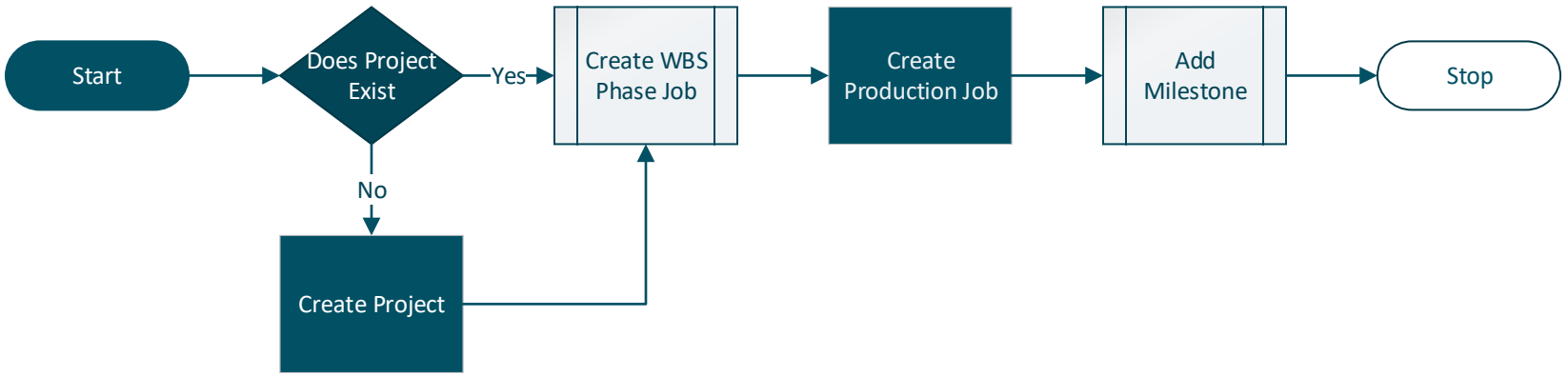
STAGE: Create Production Job



Role Assignment:
- Production Planner

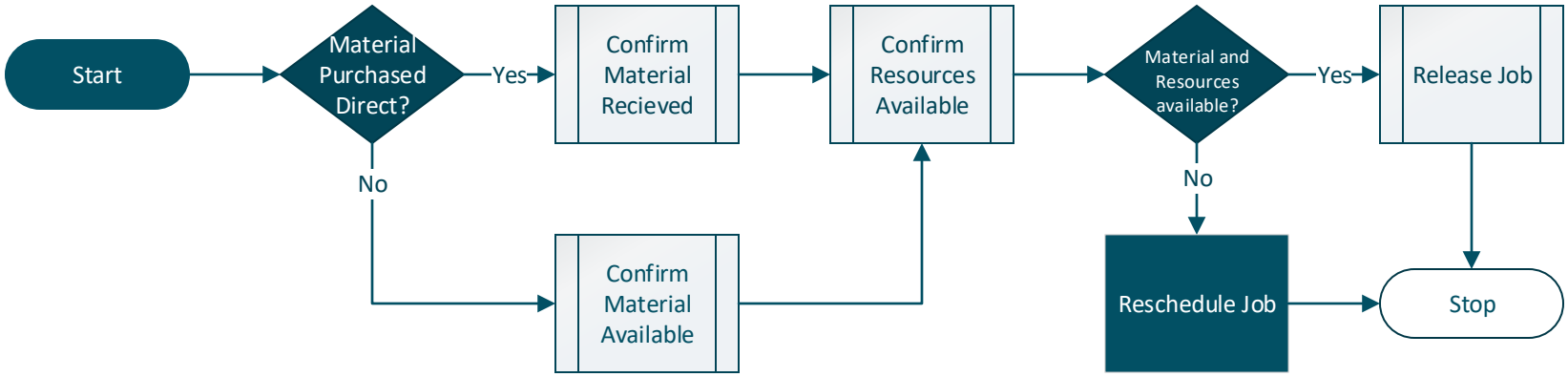
License Requirements:

STAGE: Create Project Job



Role Assignment:
- Production Planner/Project Manager

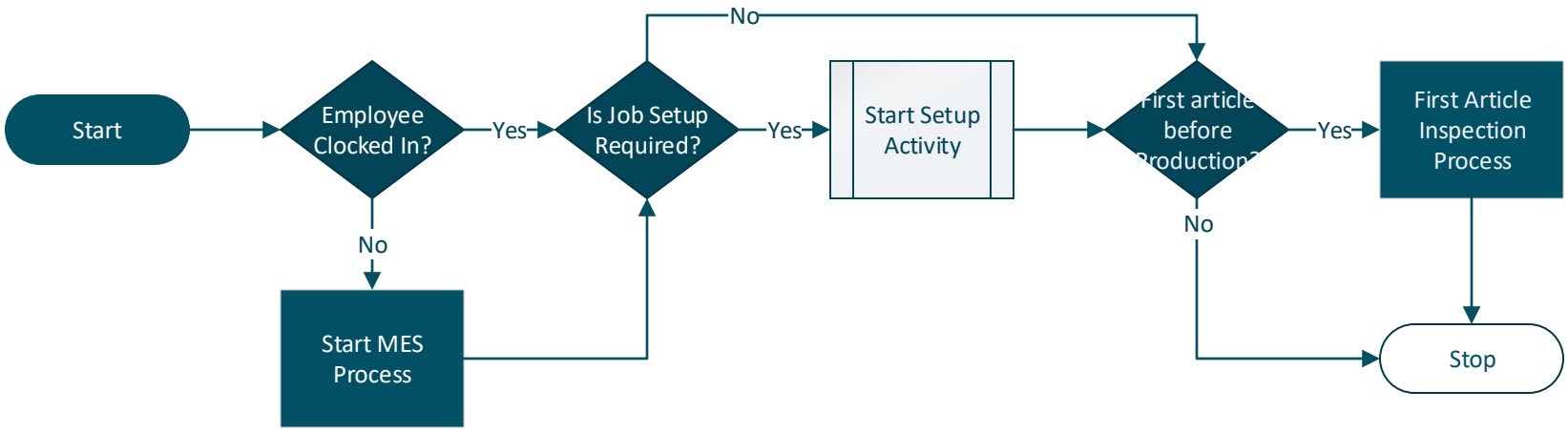
License Requirements:



Role Assignment:
- Production Planner/Production Supervisor

License Requirements:

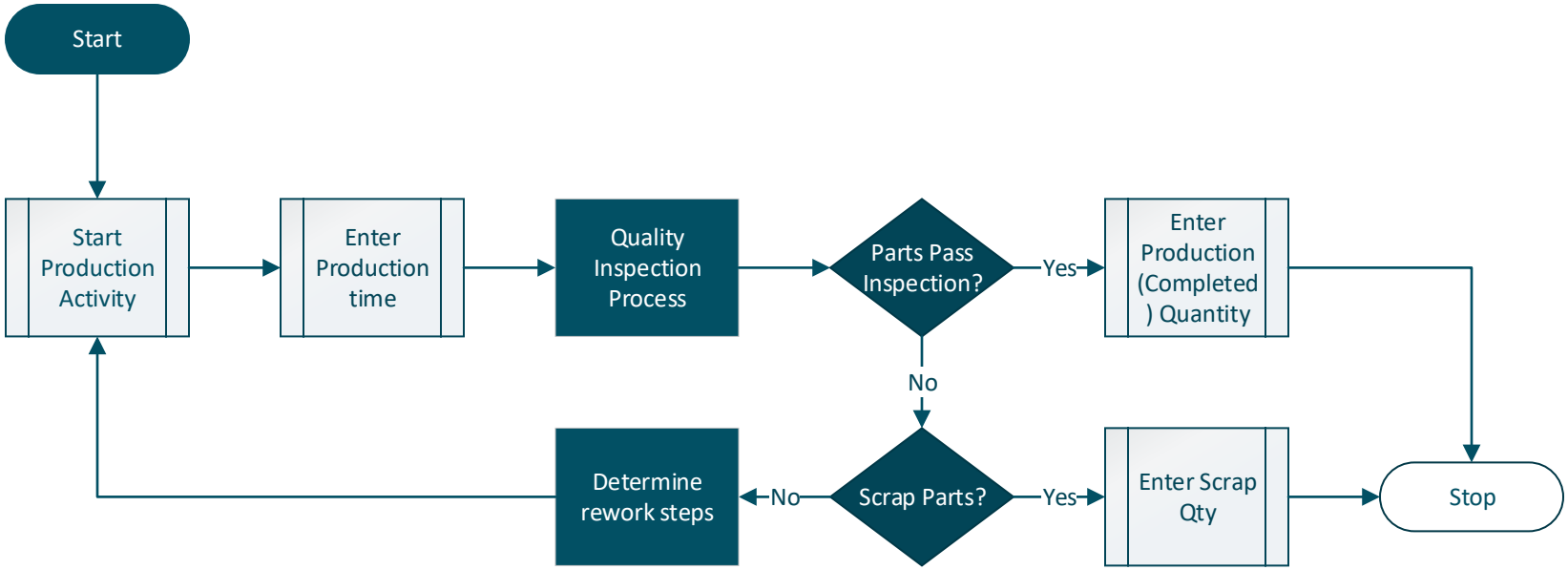
STAGE: Perform Setup



Role Assignment:
- Production Operator

License Requirements:

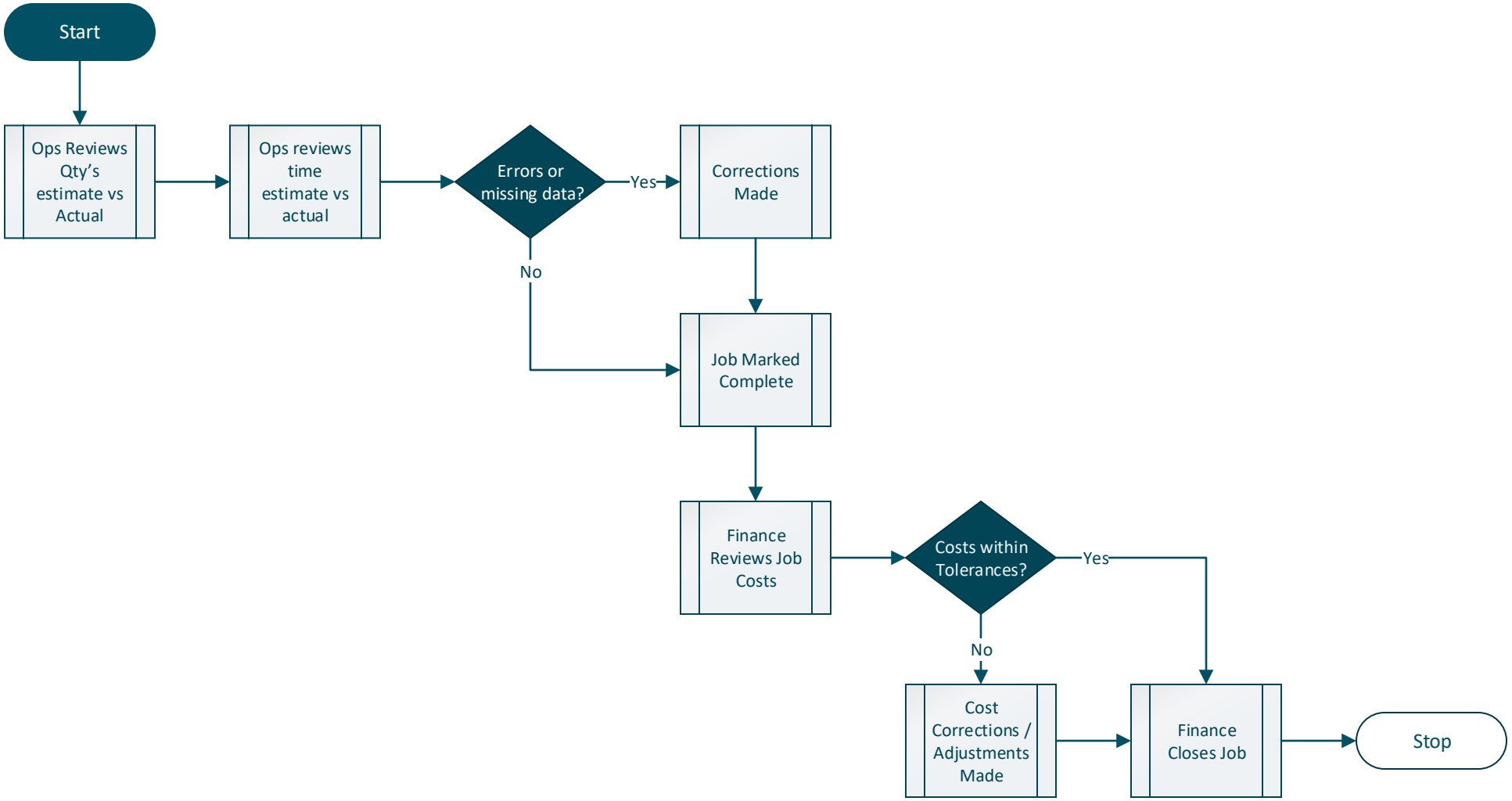
STAGE: Run Production



Role Assignment:
- Production Operator / Quality Inspector

License Requirements:

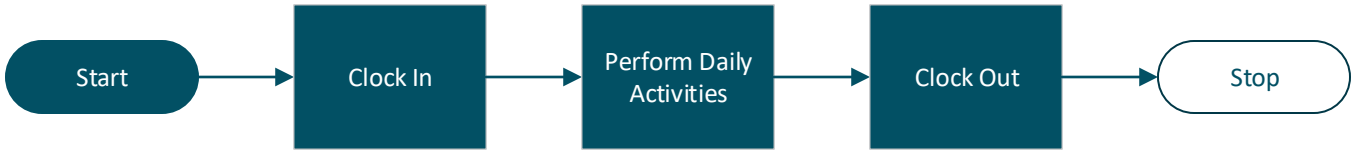
STAGE: Review and Close Job



Role Assignment:
- Production Supervisor / Finance

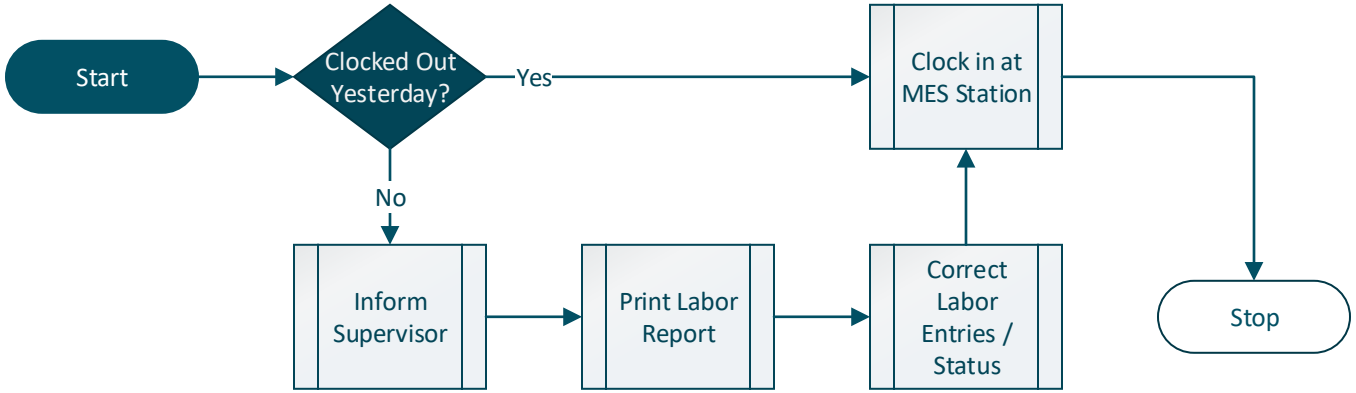
License Requirements:

PROCESS: Clock In and Job Activity



Role Assignment:
- Production Operator, Production Supervisor

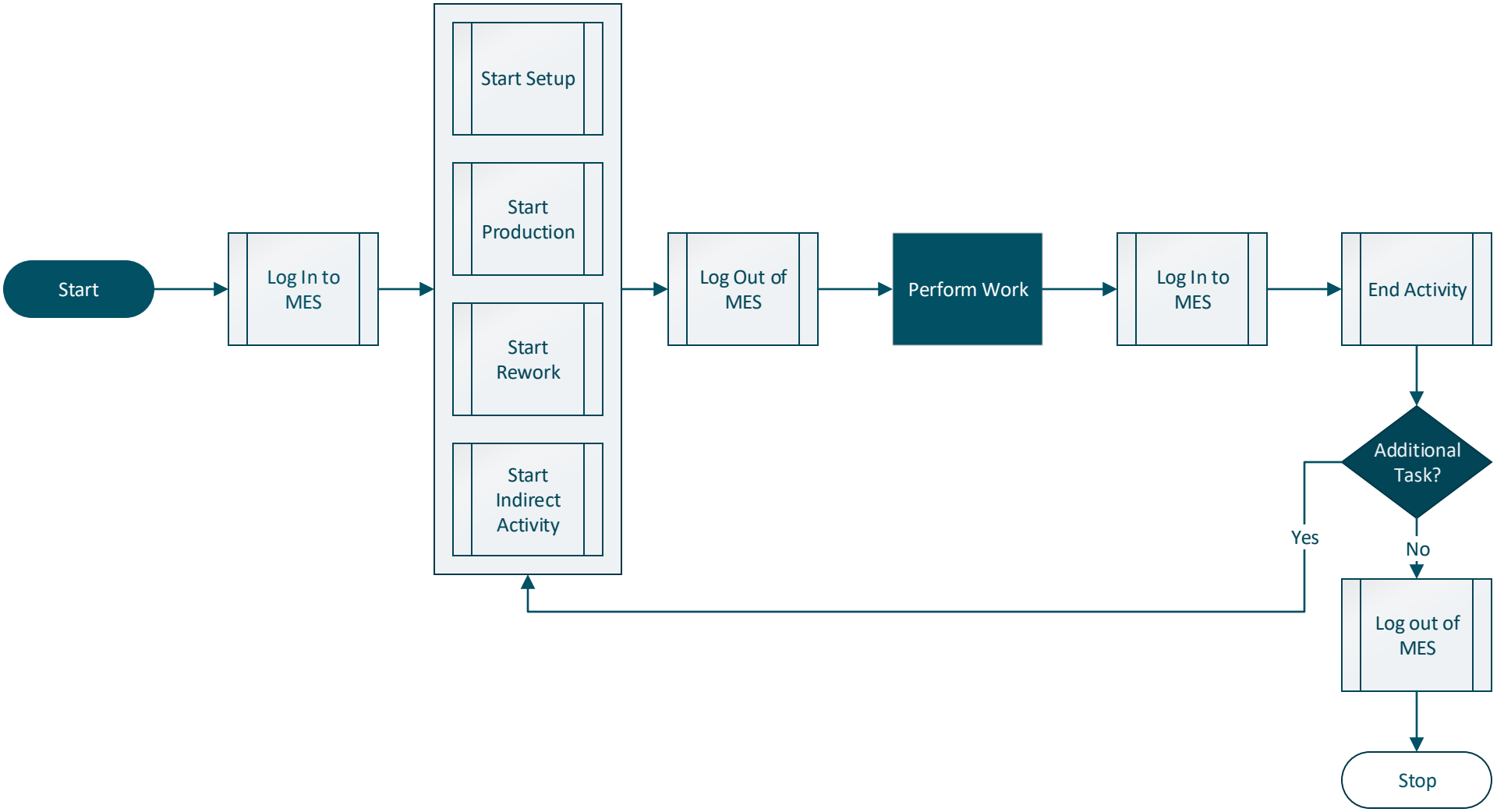
License Requirements:



Role Assignment:
- Production Operator, Production Supervisor

License Requirements:

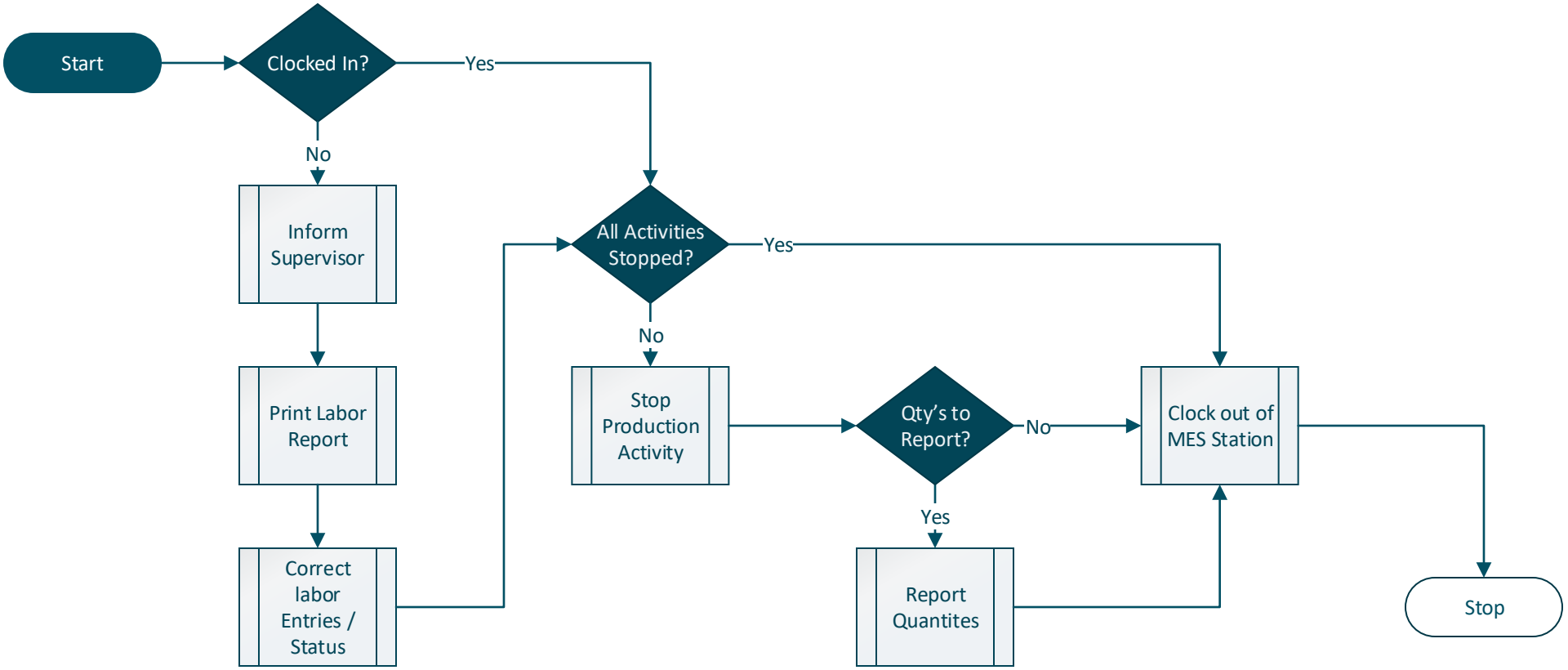
STAGE: Perform Daily Activities



Role Assignment:
- Production Operator

License Requirements:

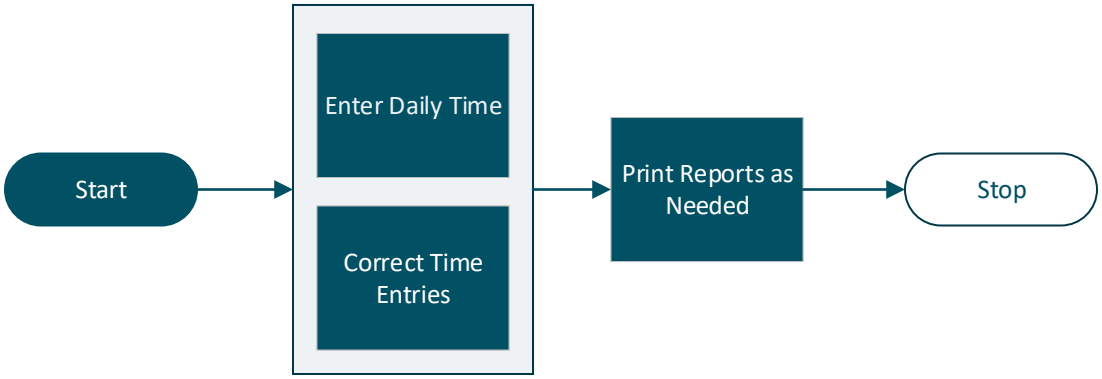
STAGE: Clock Out



Role Assignment:
- Production Operator / Production Supervisor

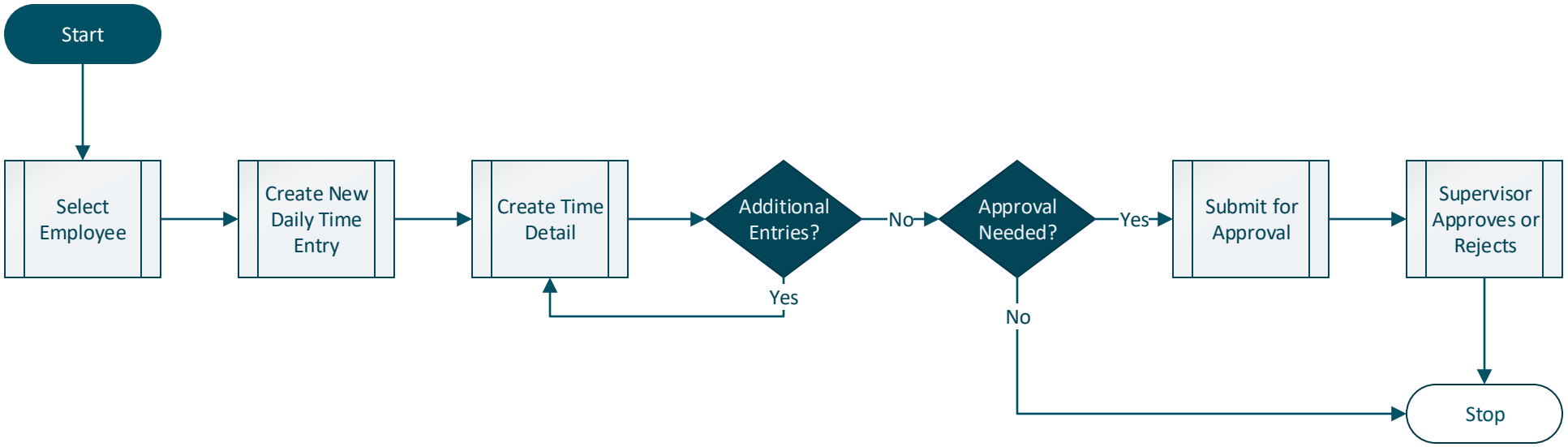
License Requirements:

PROCESS: Manual Time Entry



Role Assignment:
- Production Operator / Production Manager

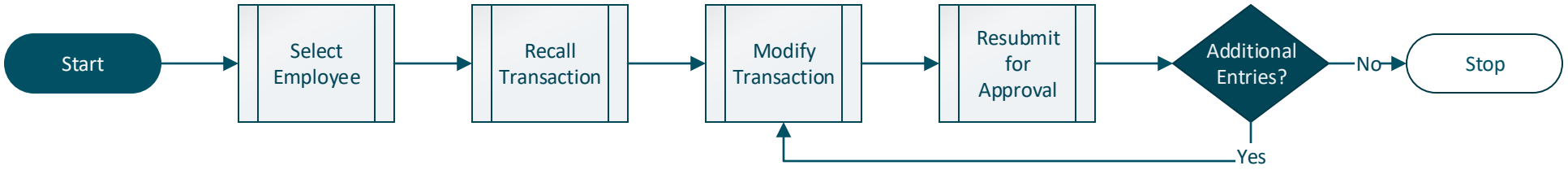
License Requirements:



Role Assignment:
- Production Operator / Production Manager

License Requirements:

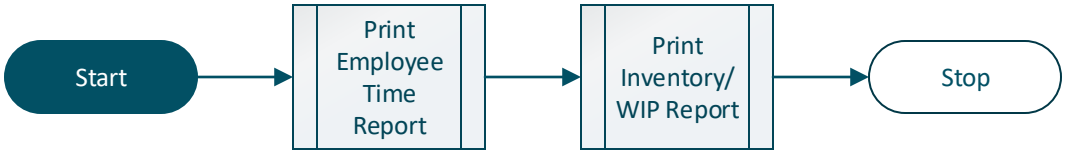
STAGE: Correct Time Entries



Role Assignment:
- Production Operator

License Requirements:

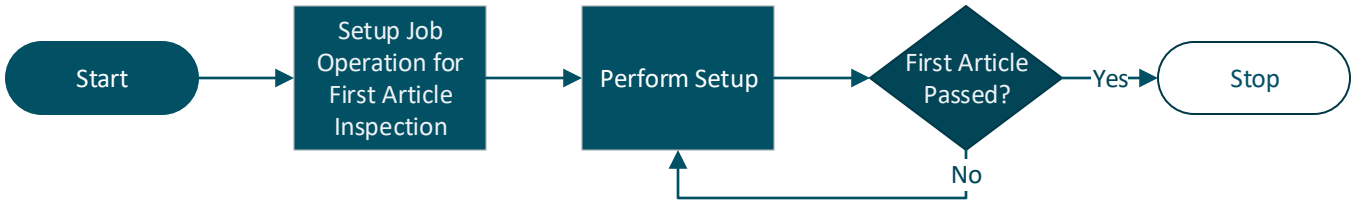
STAGE: Print Reports as Needed



Role Assignment:
- Production Manager

License Requirements:

PROCESS: Operation First Article Inspection



Role Assignment:
- Engineering / Production Planner / Production Operator

License Requirements:

Role Assignment:
- Engineering / Production Planner

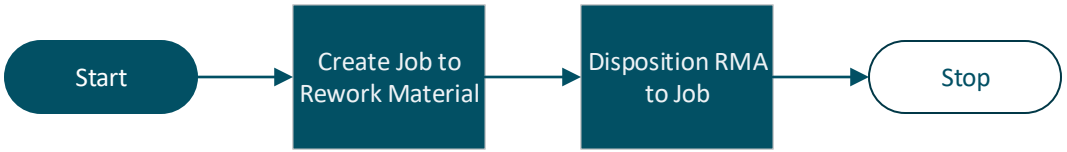
License Requirements:

STAGE: Setup Job Operation for First Article

Role Assignment:
- Production Operator

Notes: There is a flag in Company Configuration to prevent and Operator from starting Production without Quality Approval

License Requirements:



Role Assignment:
- Production Planner / Quality

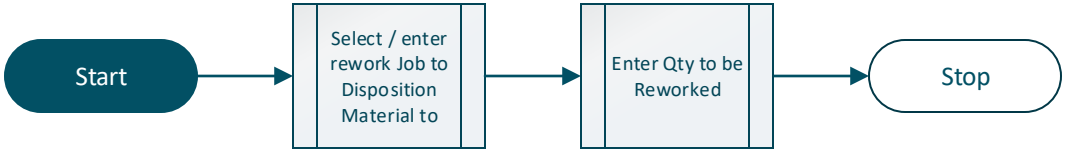
License Requirements:

STAGE: Create Job to Rework Material

Role Assignment:
- Production Planner / Engineering

License Requirements:

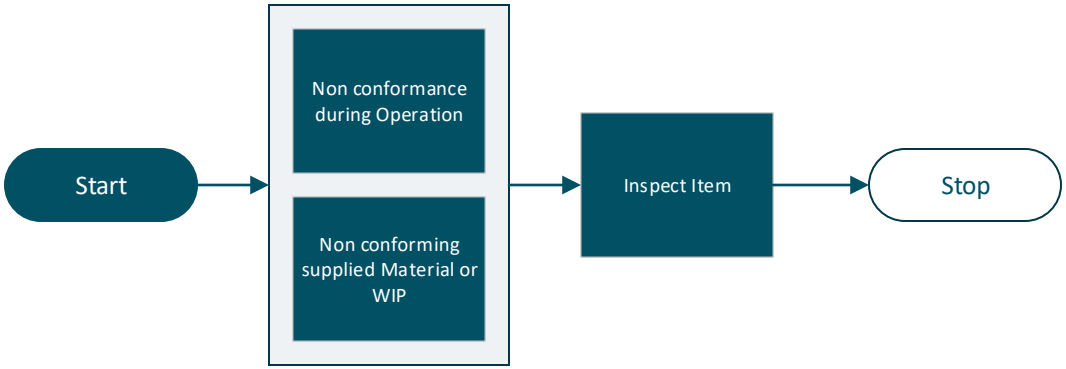
STAGE: Create Job to Rework Material



Role Assignment:
- Customer Service / Quality

License Requirements:

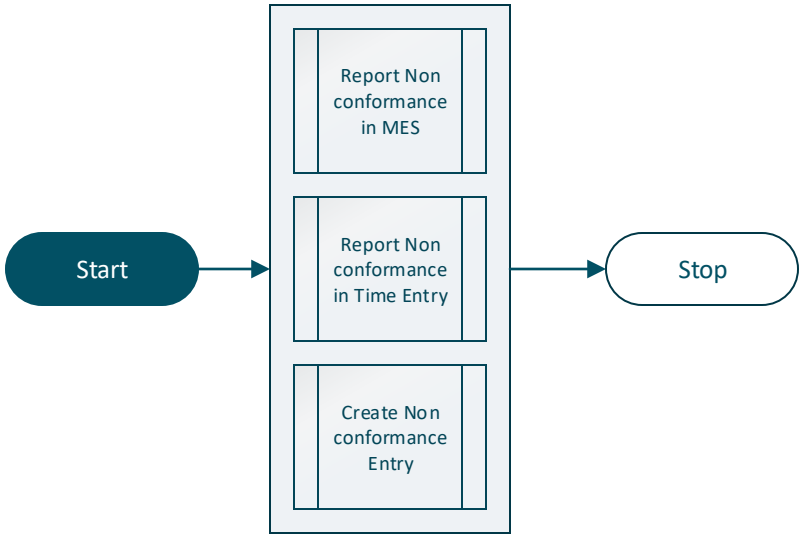
PROCESS: Nonconformance Entry



Role Assignment:
- Customer Service / Quality / Inventory Control

License Requirements:

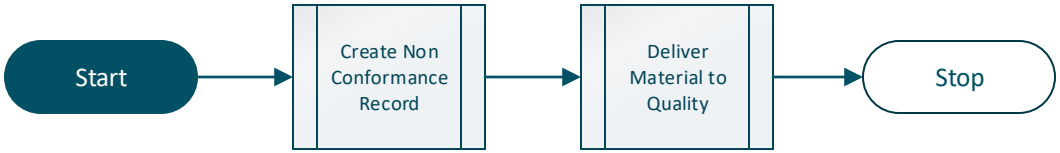
STAGE: Nonconformance During Production



Role Assignment:
- Quality

License Requirements:

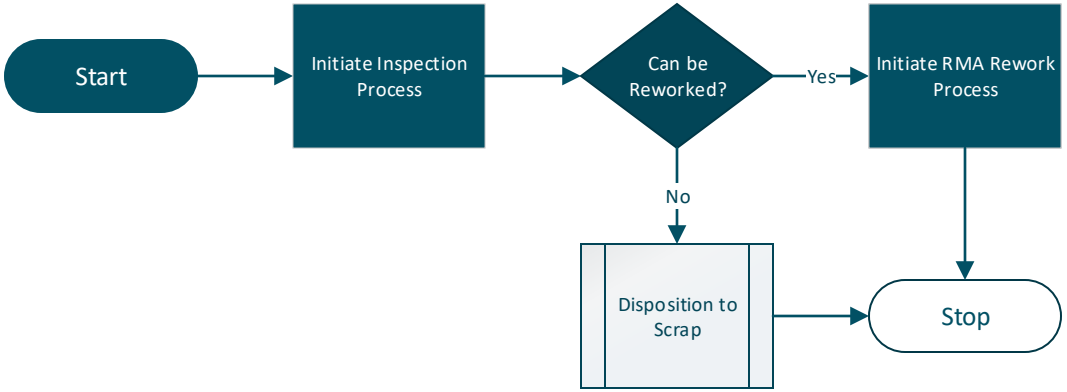
STAGE: Nonconforming Supplier Material or WIP



Role Assignment:
- Inventory Control / Production Operator

License Requirements:

STAGE: Inspect Item



Role Assignment:
- Quality

License Requirements:

Quality Assurance

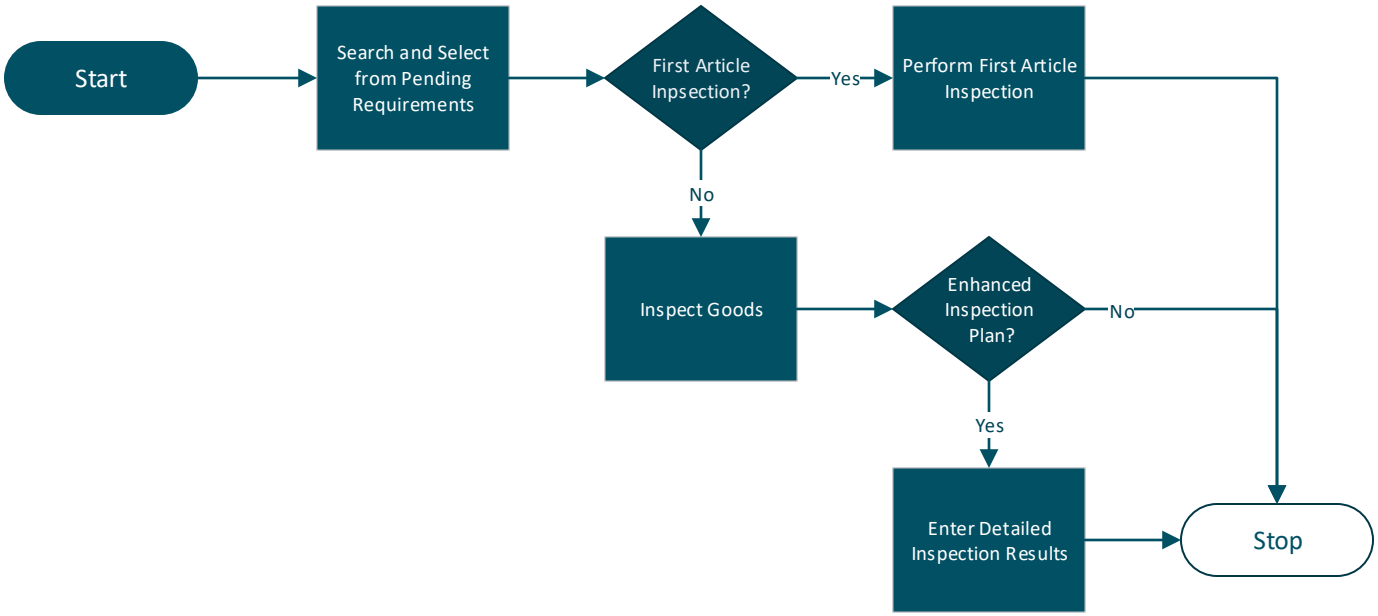
Inspection Processing

Process Discrepant Material Request (DMR)

Corrective Action

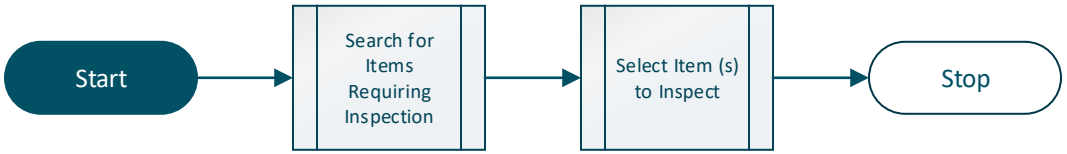
Supplier Review by Quality

PROCESS: Inspection Processing



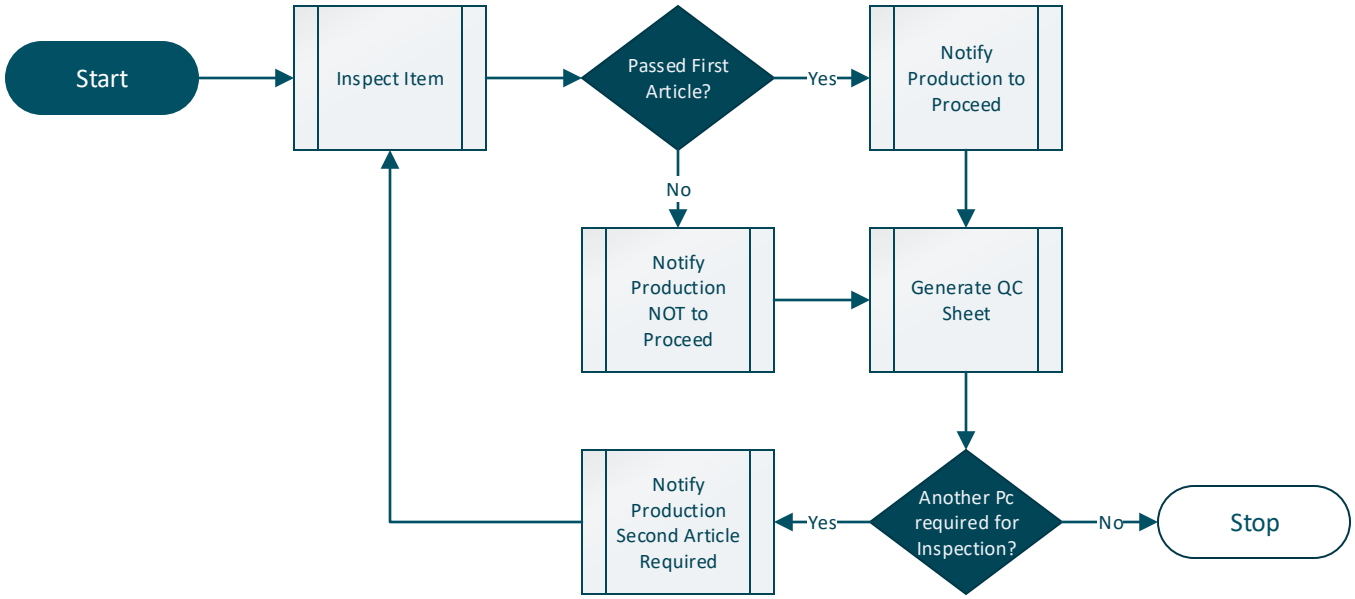
Role Assignment:
-Quality
License Requirements:

STAGE: Search and Select from Pending Requirements



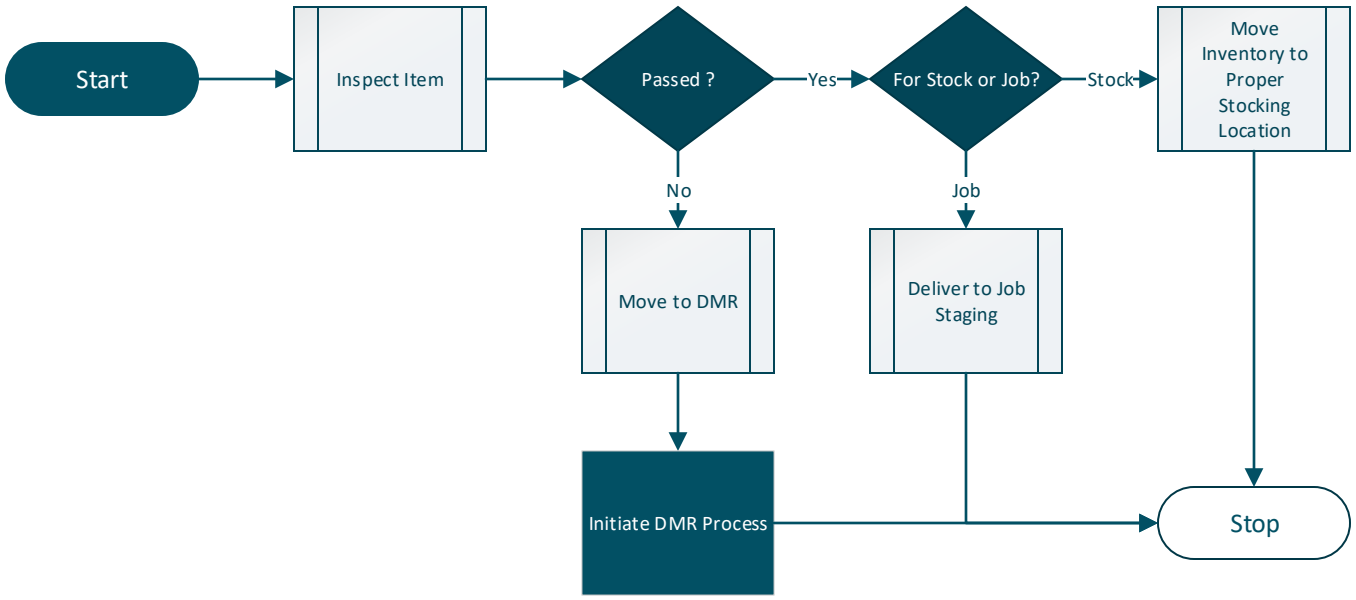
Role Assignment:
-Quality
Notes: Categories to search for are: First Article, PO Receipt, RMA, Nonconformance Operations and Inventory
License Requirements:

STAGE: Search and Select from Pending Requirements



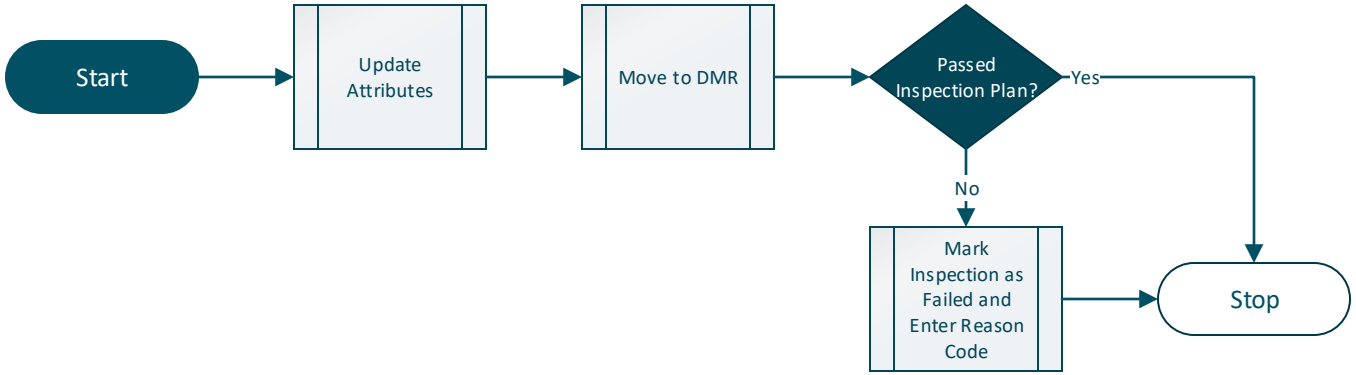
Role Assignment:
-Quality
License Requirements:

STAGE: Inspect Goods



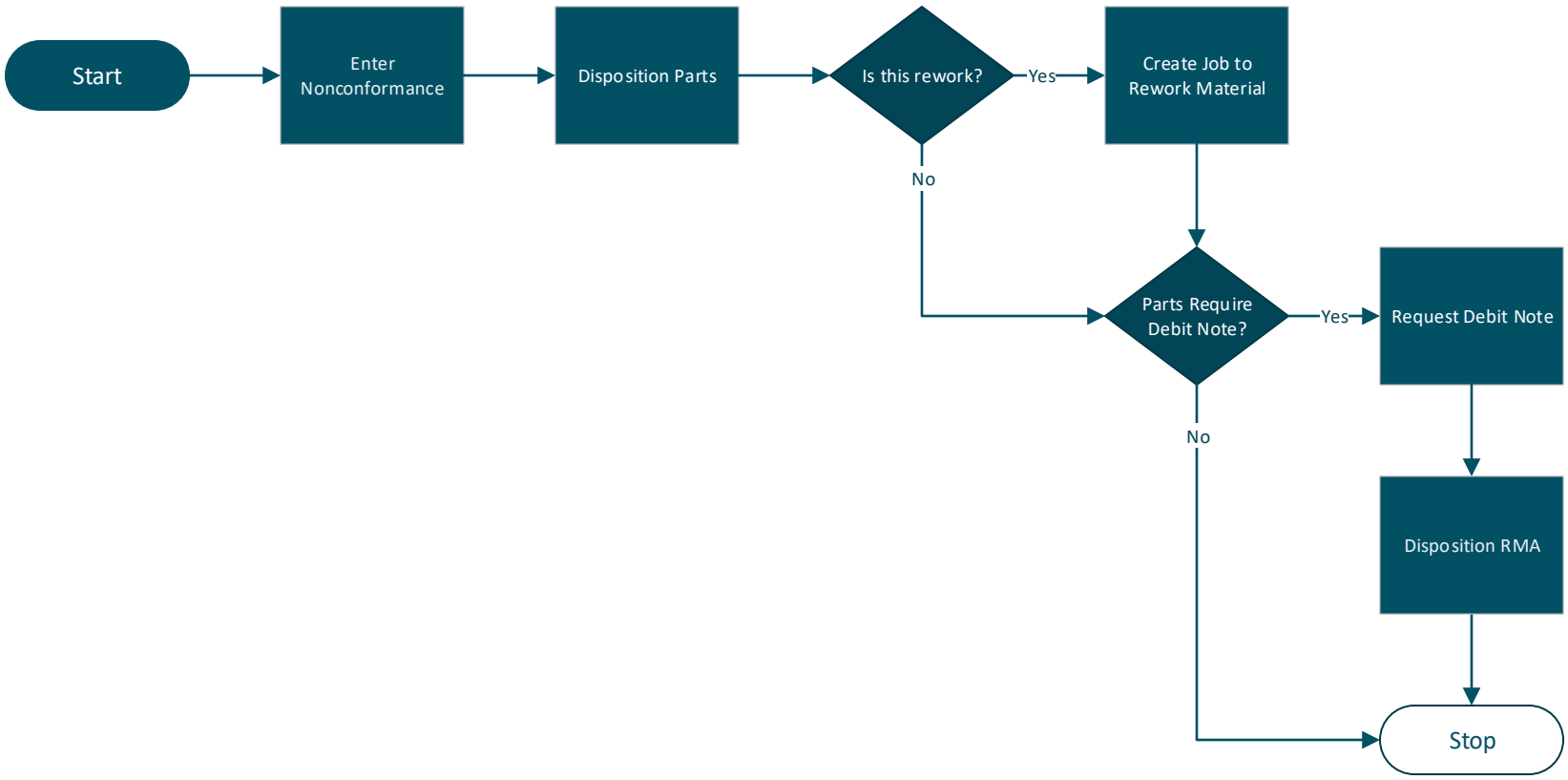
Role Assignment:
-Quality
License Requirements:

STAGE: Enter Detailed Inspection Results



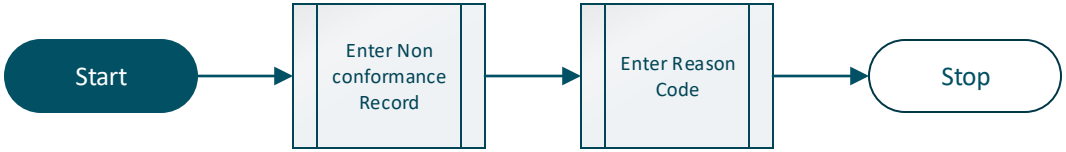
Role Assignment:
-Quality
License Requirements:

PROCESS: Process Discrepant Material Request (DMR)



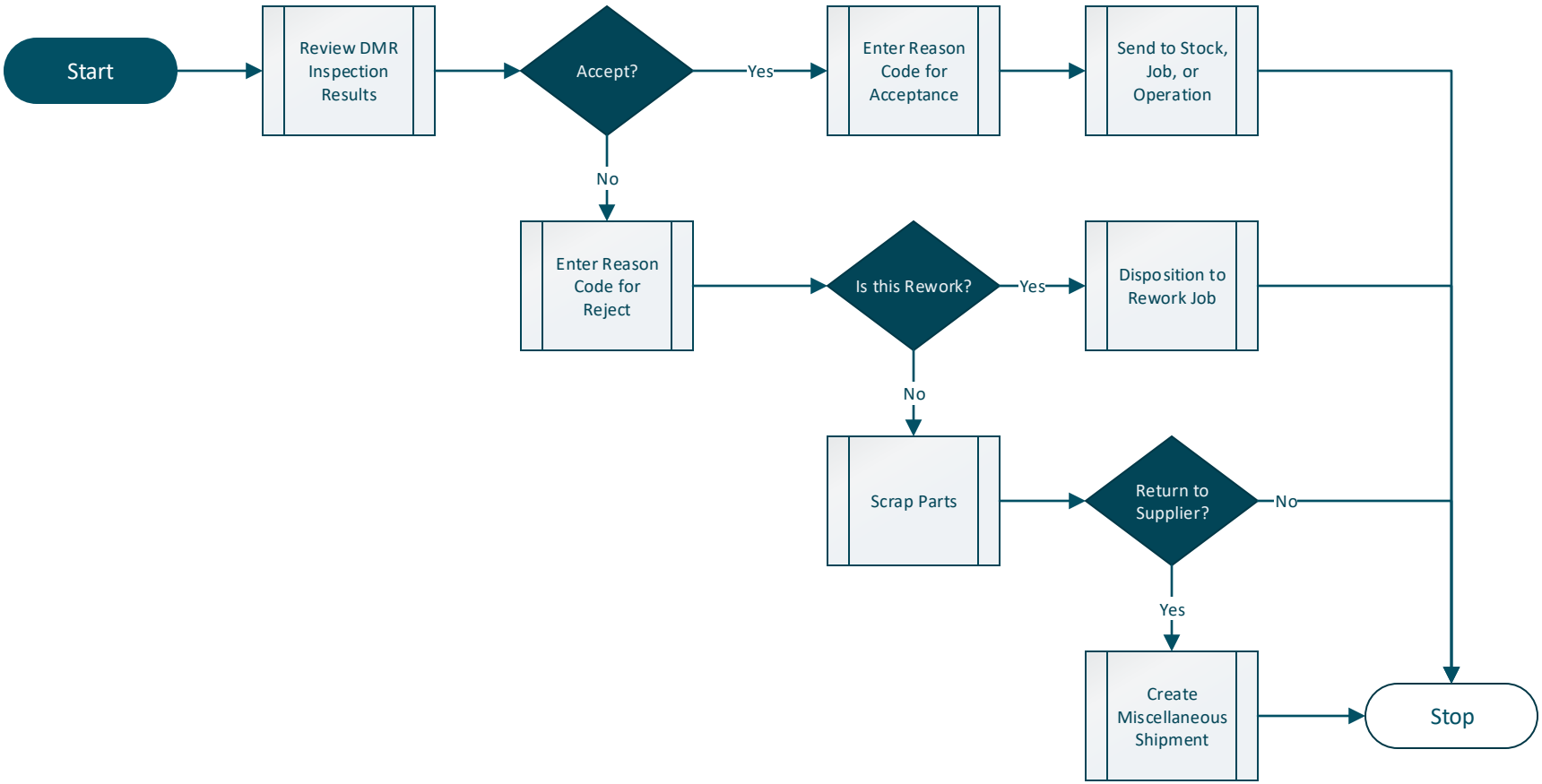
Role Assignment:
-Quality
License Requirements:

STAGE: Enter Non-Conformance



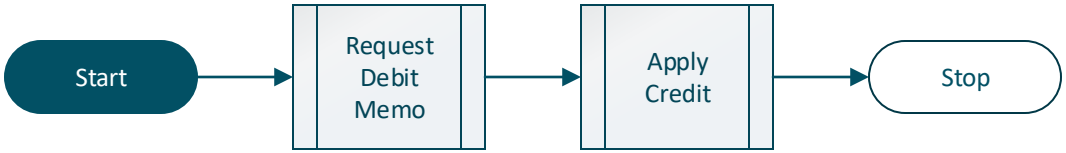
Role Assignment:
-Quality
License Requirements:

STAGE: Disposition Parts

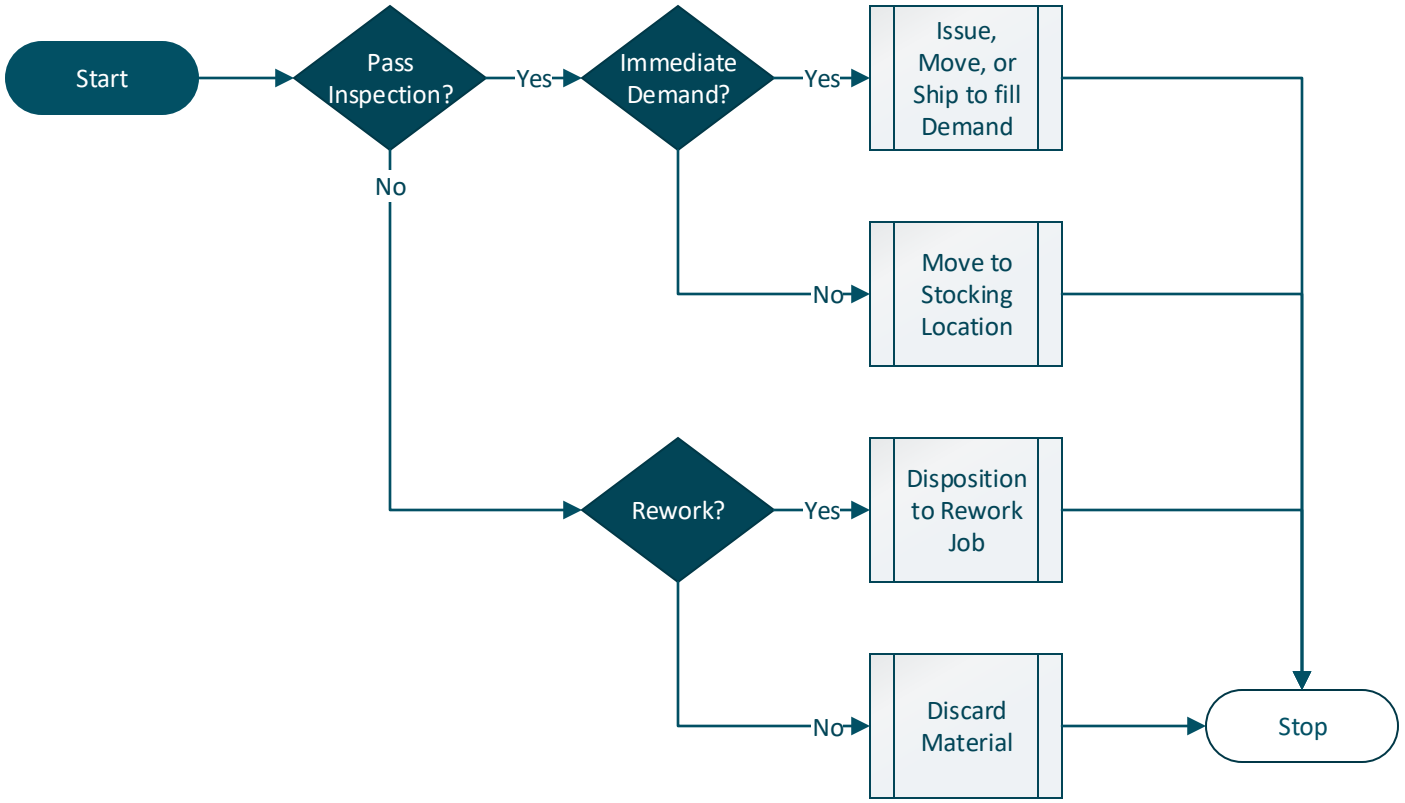


Role Assignment:
-Quality
License Requirements:

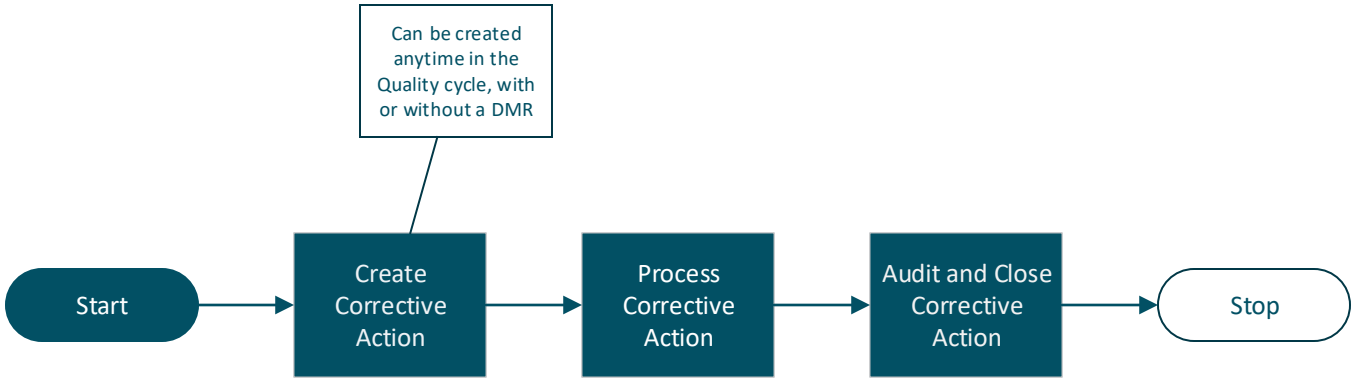
Role Assignment:
-Quality / Production Planner
License Requirements:



Role Assignment:
-Quality / Finance
License Requirements:

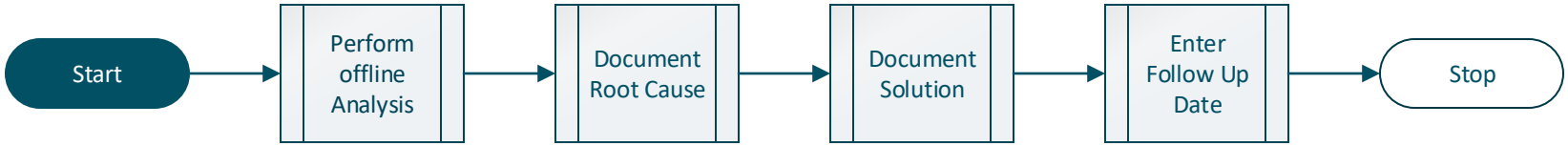


Role Assignment:
-Quality / Inventory Control
License Requirements:



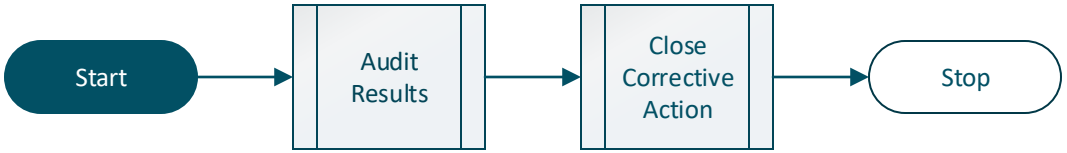
Role Assignment:
-Quality
License Requirements:

Role Assignment:
-Quality
License Requirements:



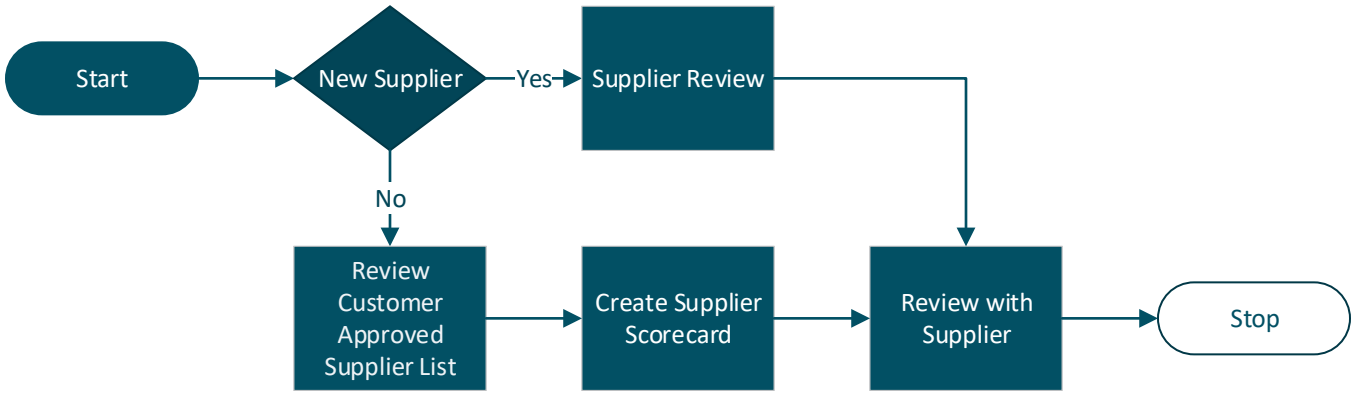
Role Assignment:
-Quality
License Requirements:

STAGE: Audit and Close Corrective Action

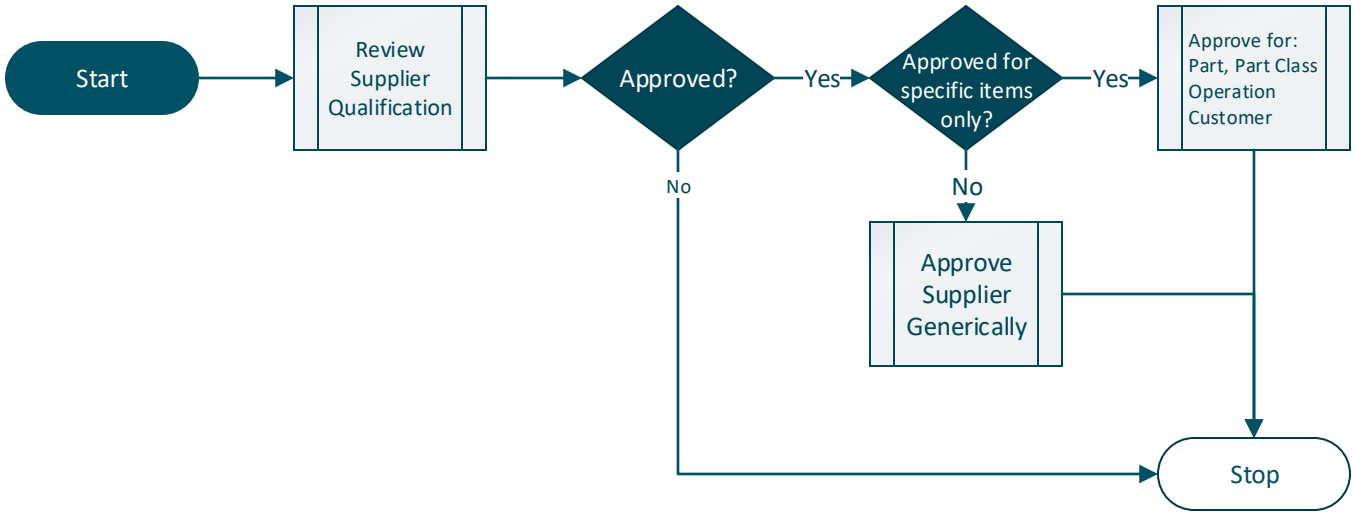


Role Assignment:
-Quality
License Requirements:

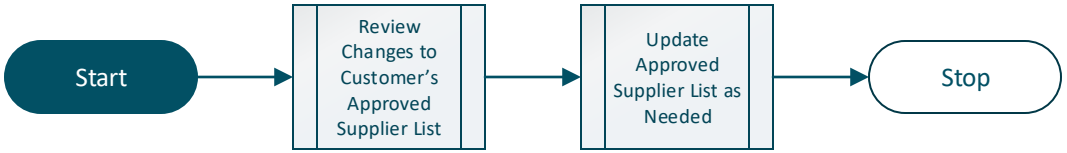
PROCESS: Supplier Review by Quality



Role Assignment:
-Quality
License Requirements:

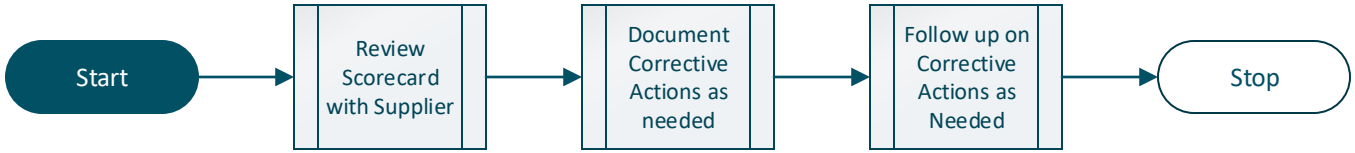


Role Assignment:
-Quality
License Requirements:



Role Assignment:
-Quality
License Requirements:

Role Assignment:
-Quality
License Requirements:



Role Assignment:
-Quality
License Requirements:

Field Service

FUNCTION MENU

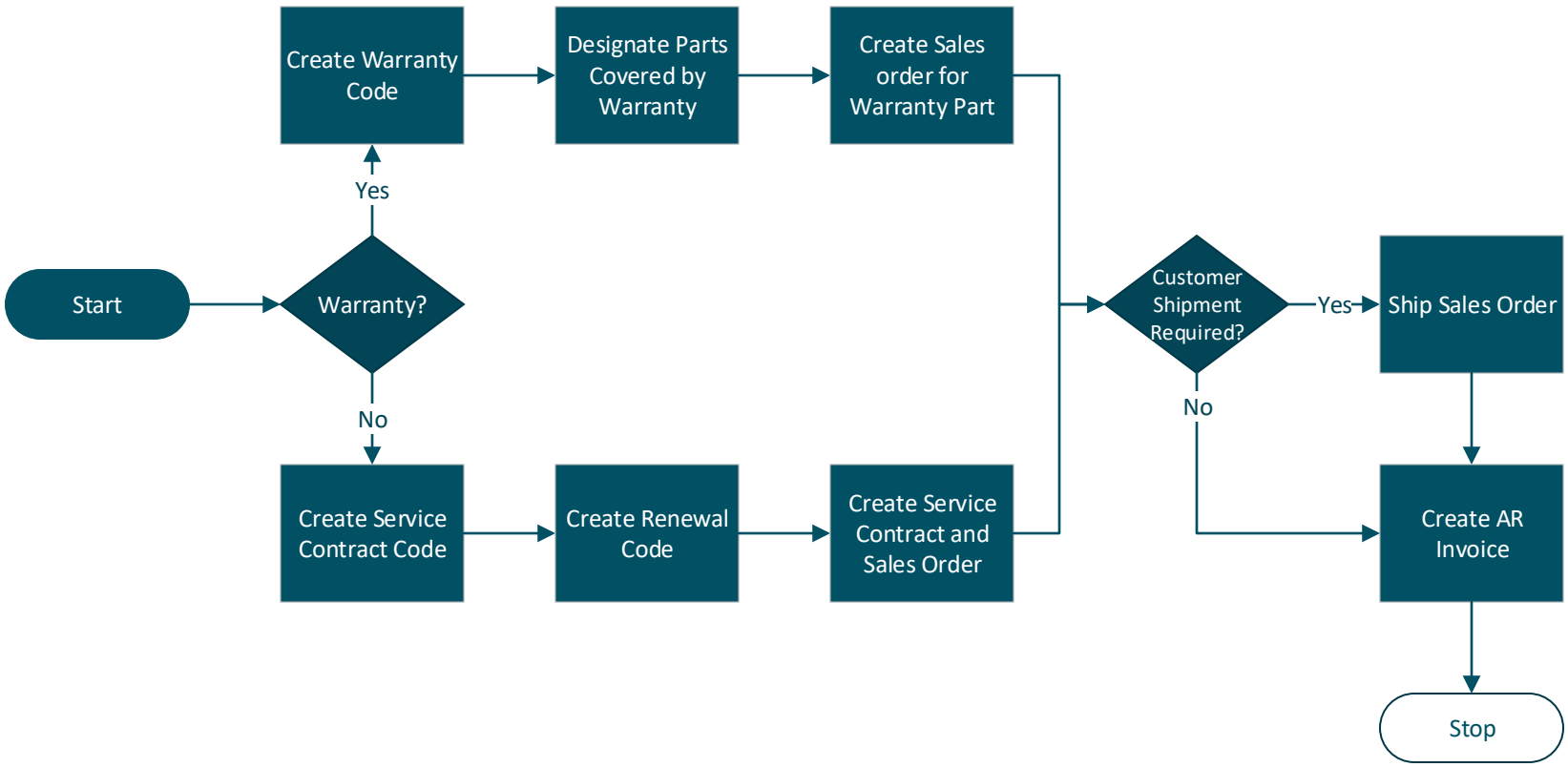
QUALITY MENU

Establish Contracts and Warranties

Call For Service

Service Job Processing

PROCESS: Establish Contracts and Warranties



Role Assignment:
- Sales

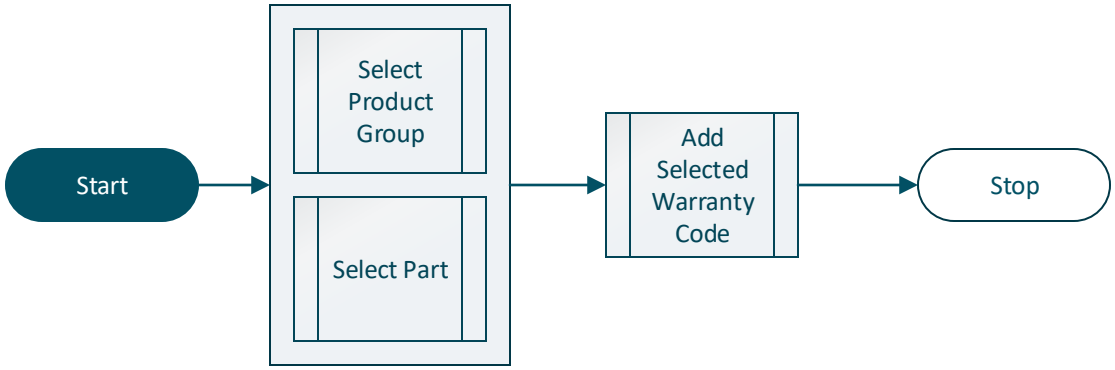
License Requirements:

STAGE: Create Warranty Code

Role Assignment:
- Sales

License Requirements:

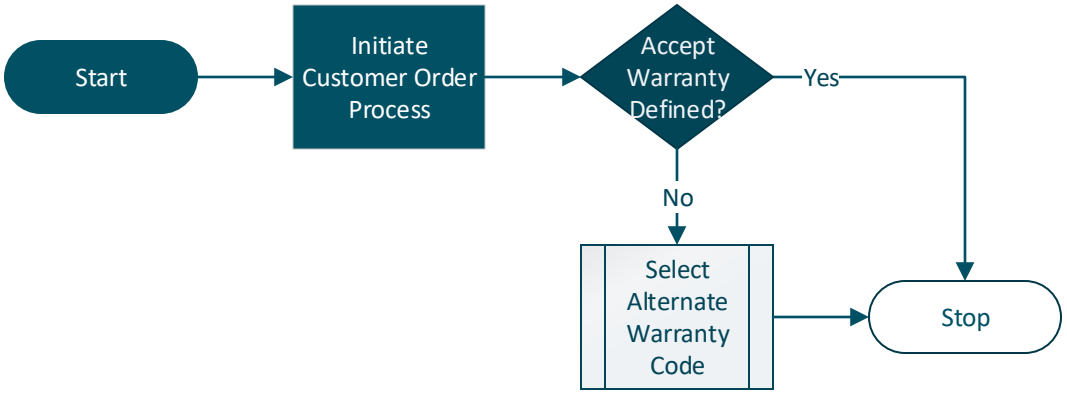
STAGE: Designate Parts Covered by Warranty



Role Assignment:
- Sales

License Requirements:

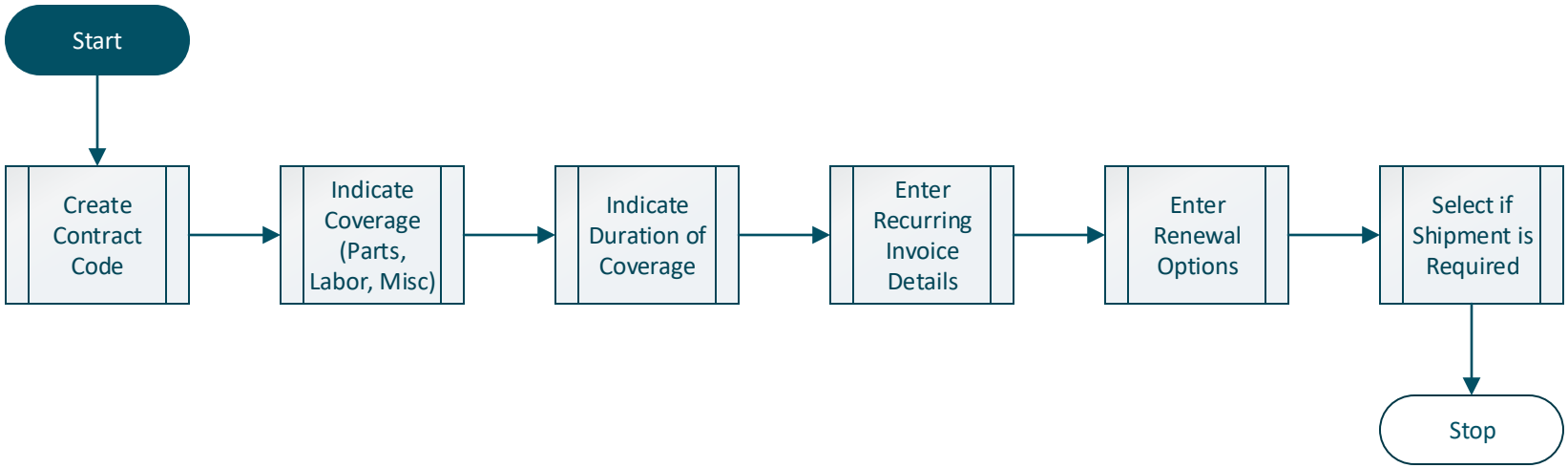
STAGE: Create Sales Order for Warranty Part



Role Assignment:
- Sales

License Requirements:

STAGE: Create Service Contract Code



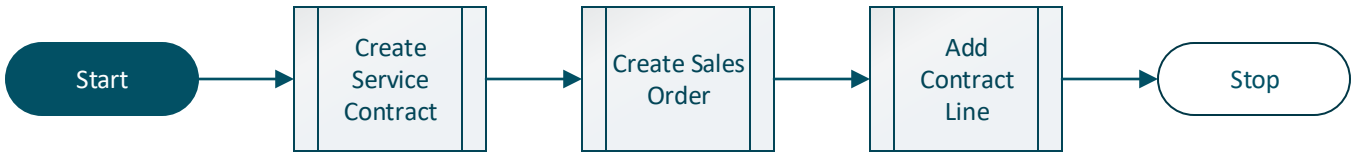
Role Assignment:
- Sales

License Requirements:

STAGE: Create Renewal Code

Role Assignment:
- Sales

License Requirements:



Role Assignment:
- Sales

License Requirements:

STAGE: Ship Sales Order

Role Assignment:
- Shipping and Receiving

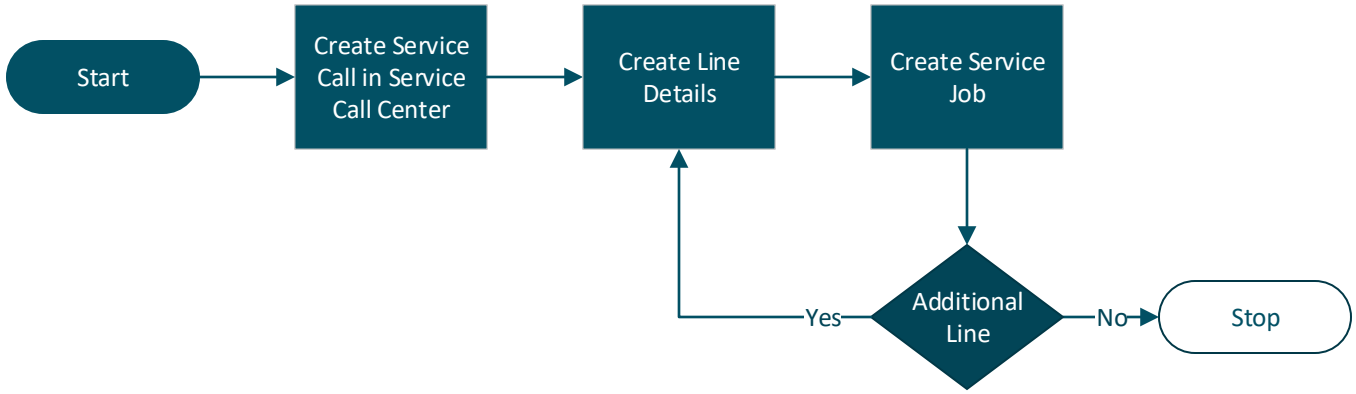
License Requirements:

STAGE: Process AR Invoice

Role Assignment:
- Finance

License Requirements:

PROCESS: Call for Service

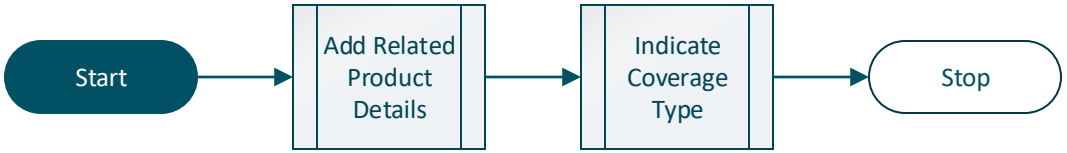


Role Assignment:
- Customer Service

License Requirements:

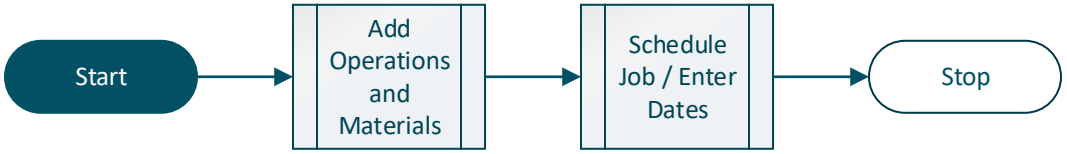
Role Assignment:
- Customer Service

License Requirements:



Role Assignment:
- Customer Service

License Requirements:



Role Assignment:
- Customer Service

License Requirements:

Role Assignment:
- Customer Service / Service Planner

License Requirements:

Role Assignment:
- Customer Service / Service Planner

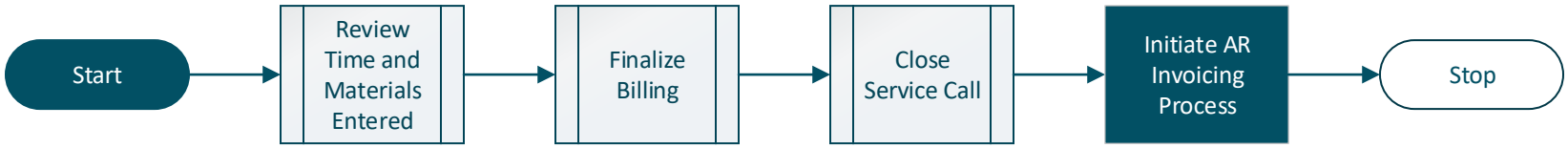
License Requirements:

STAGE: Complete Work

Role Assignment:
- Service Technician

License Requirements:

STAGE: Close and Invoice Service Call



Role Assignment:
- Finance

License Requirements:

PROCESS: Maintenance

Role Assignment:
- Planner / Scheduler

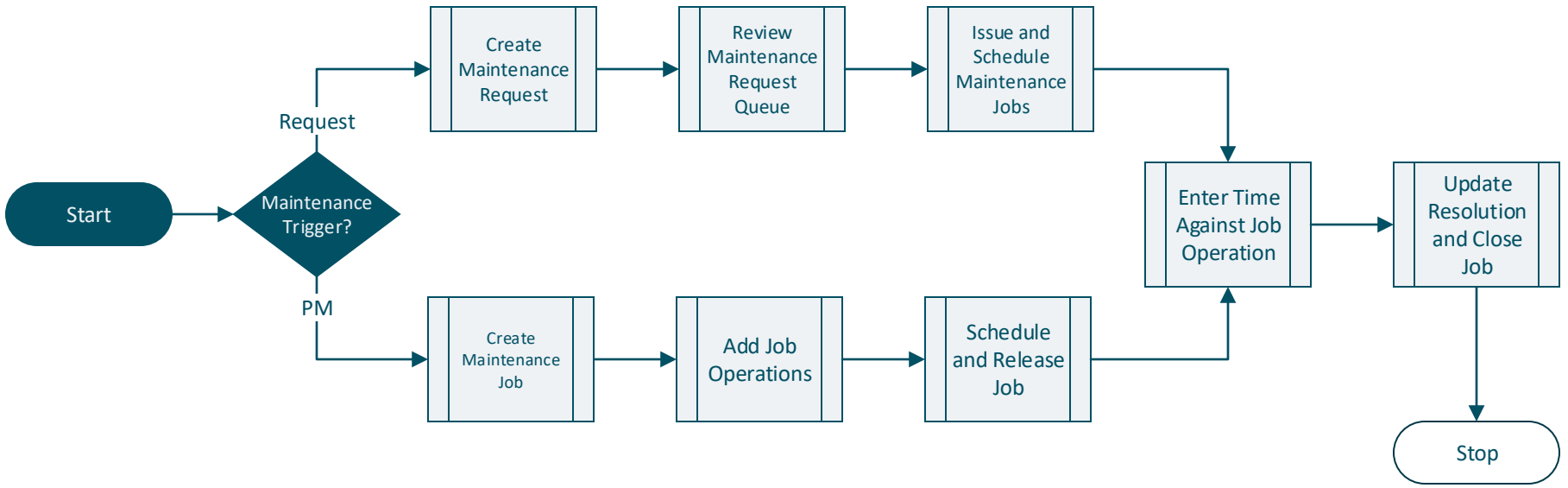
License Requirements:

Role Assignment:
- Planner / Scheduler

License Requirements:

Role Assignment:
- Planner / Scheduler

License Requirements:



Role Assignment:
- Planner / Scheduler

License Requirements:

Shipping and Receiving

FUNCTION MENU

MAINTENANCE MENU

Pick and Ship Orders

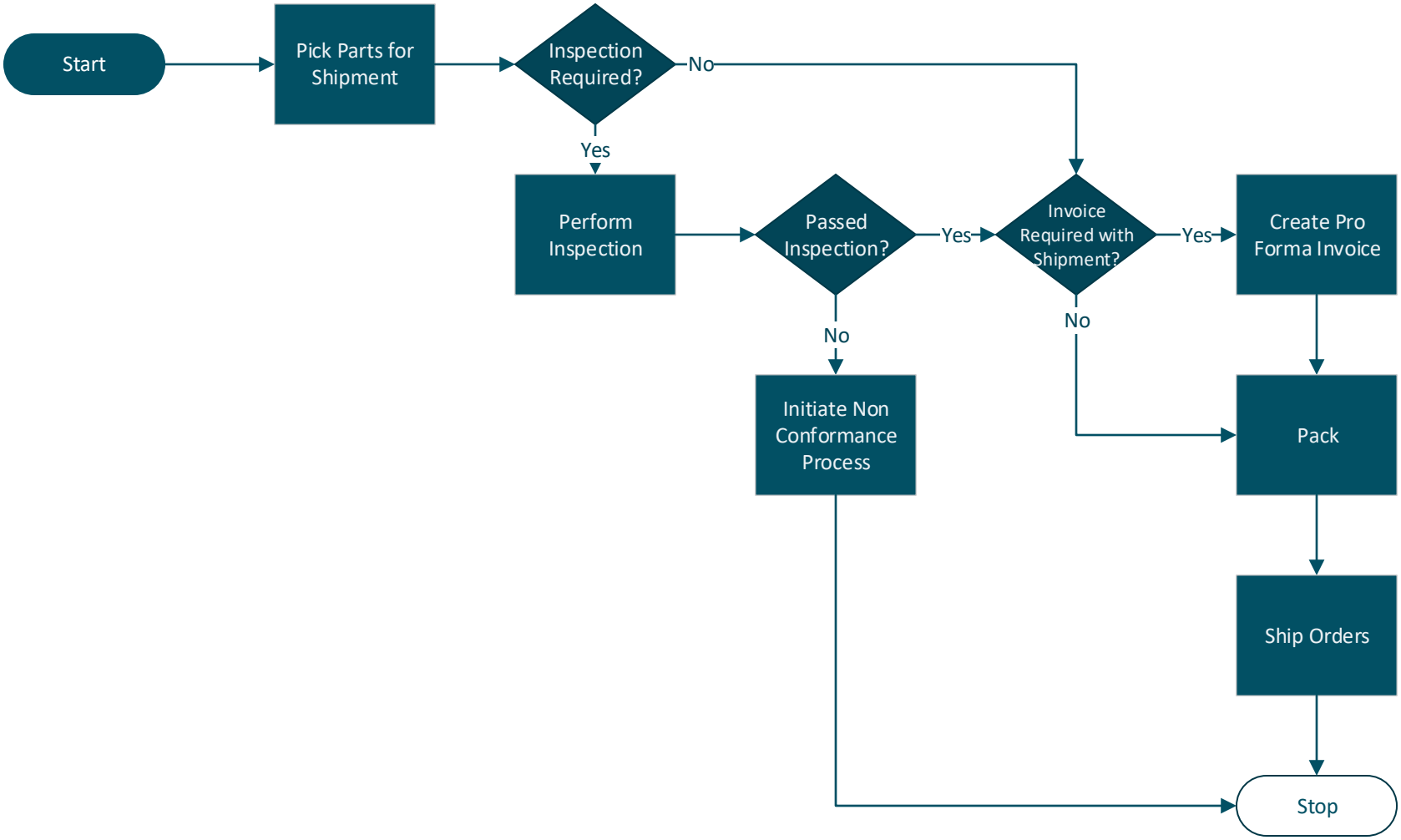
Pick and Ship Transfers

Receive from Suppliers

Receive Transfer Orders

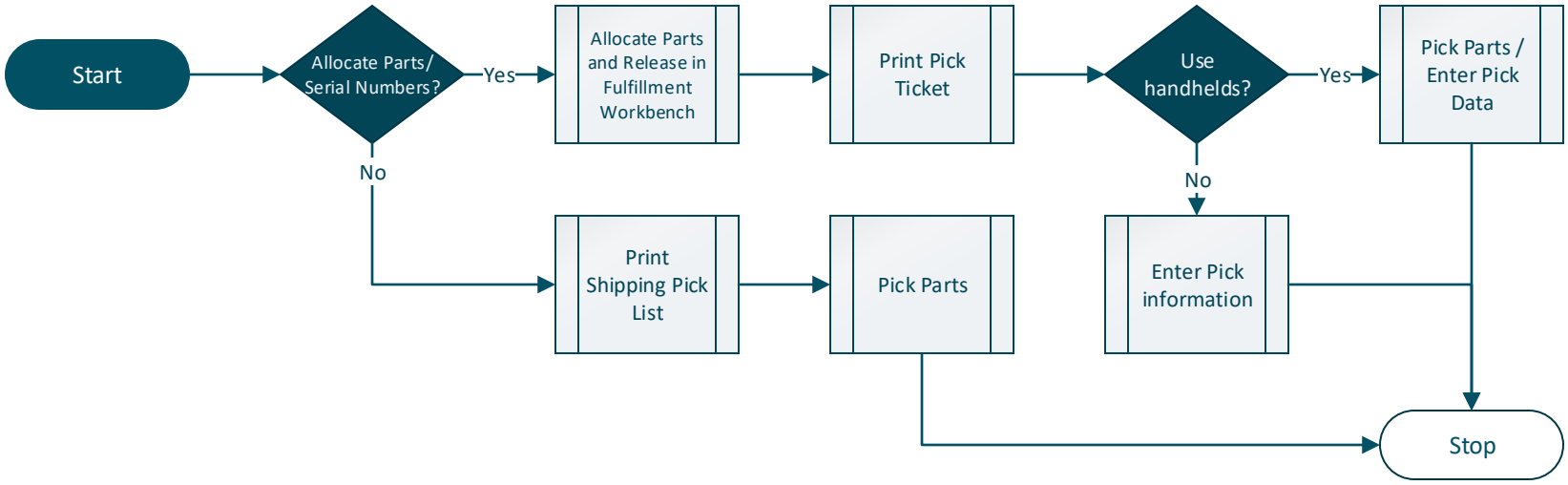
Subcontract Shipments

Drop Shipment Receipts



Role Assignment:
-Inventory Control / Quality
License Requirements:

STAGE: Pick Parts for Shipment

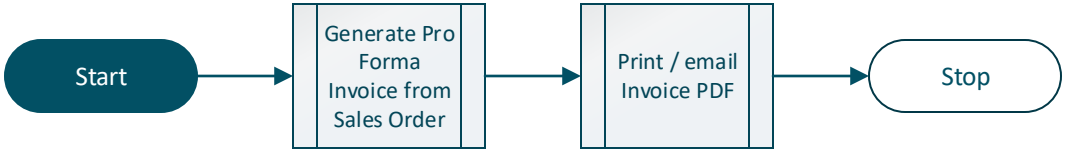


Role Assignment:
-Inventory Control
License Requirements:

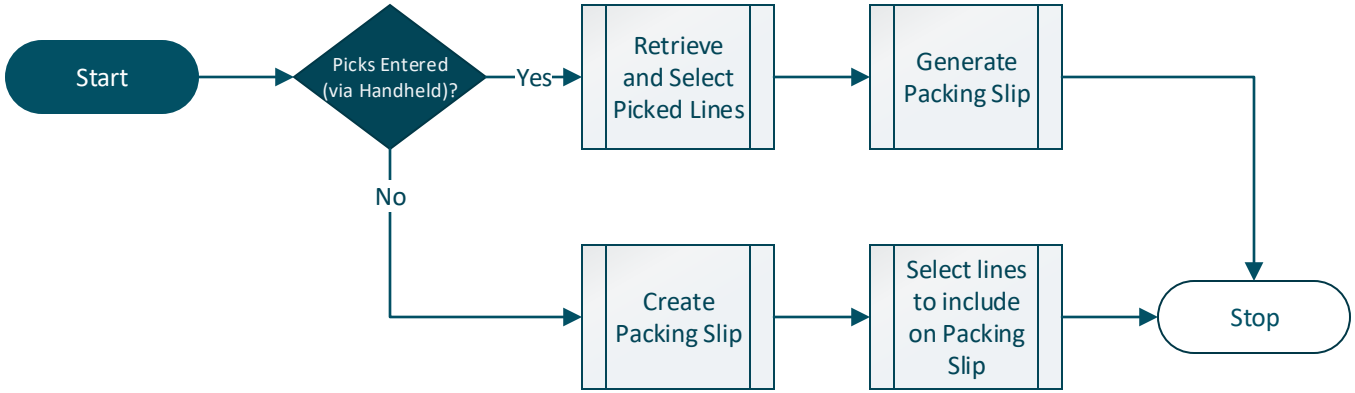
STAGE: Perform Inspection

Role Assignment:
-Inventory Control
License Requirements:

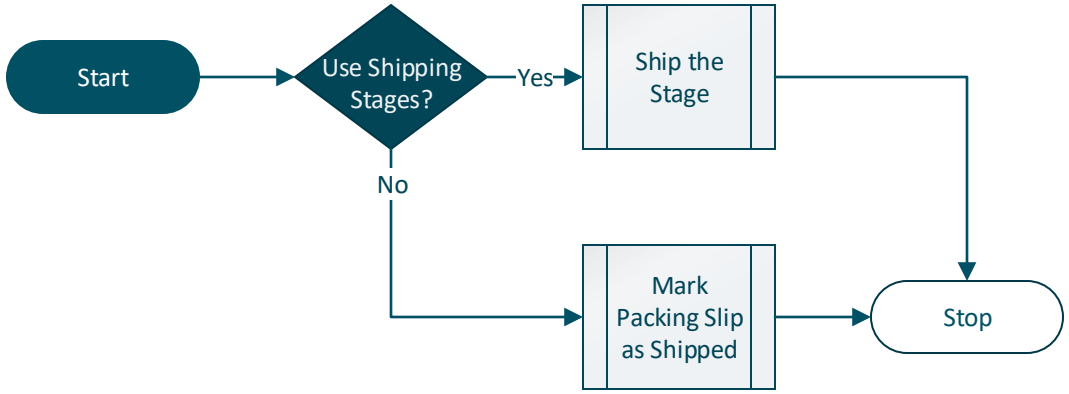
STAGE: Create Proforma Invoice



Role Assignment:
-Sales / Finance
License Requirements:

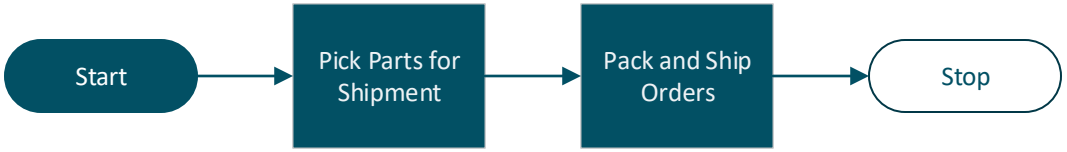


Role Assignment:
-Shipping / Receiving
License Requirements:



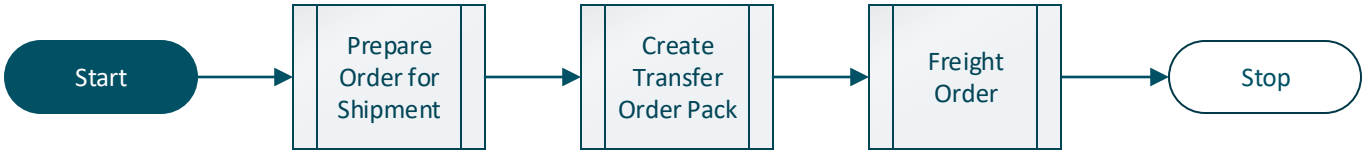
Role Assignment:
-Shipping / Receiving
License Requirements:

PROCESS: Pick and Ship Transfer Orders



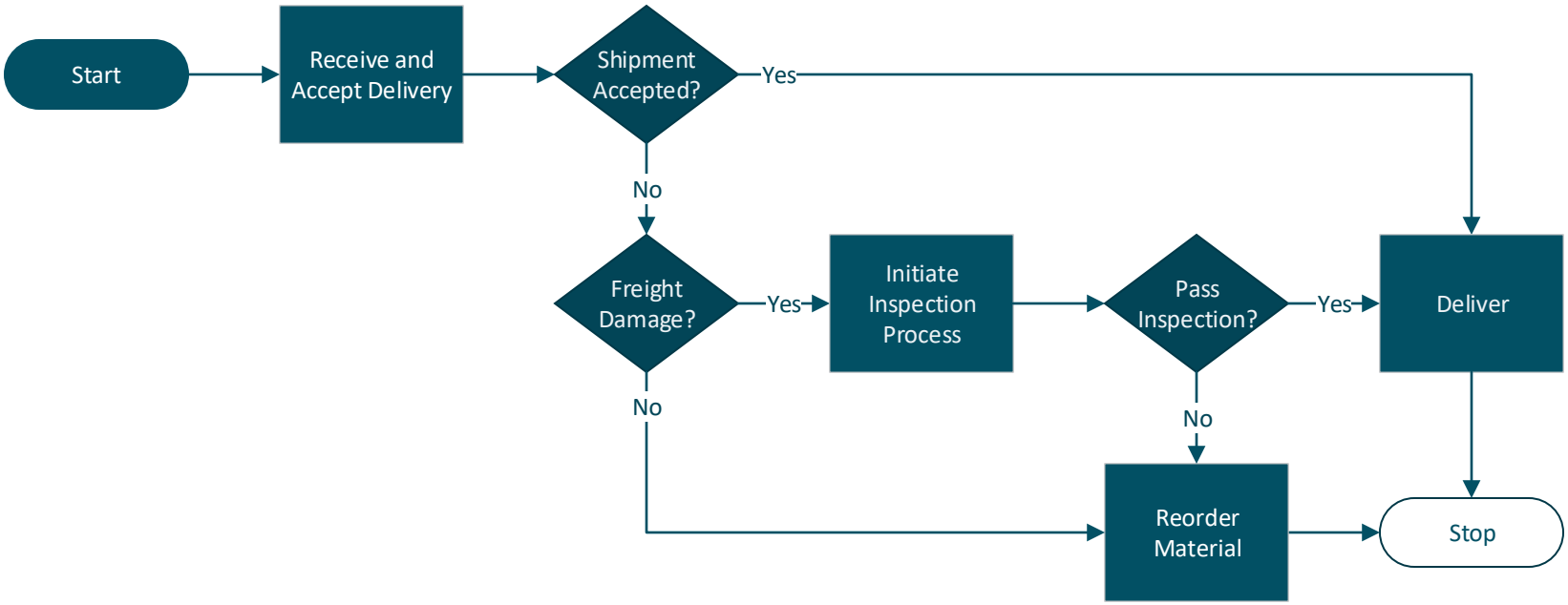
Role Assignment:
-Shipping / Receiving
License Requirements:

STAGE: Pack and Ship Order

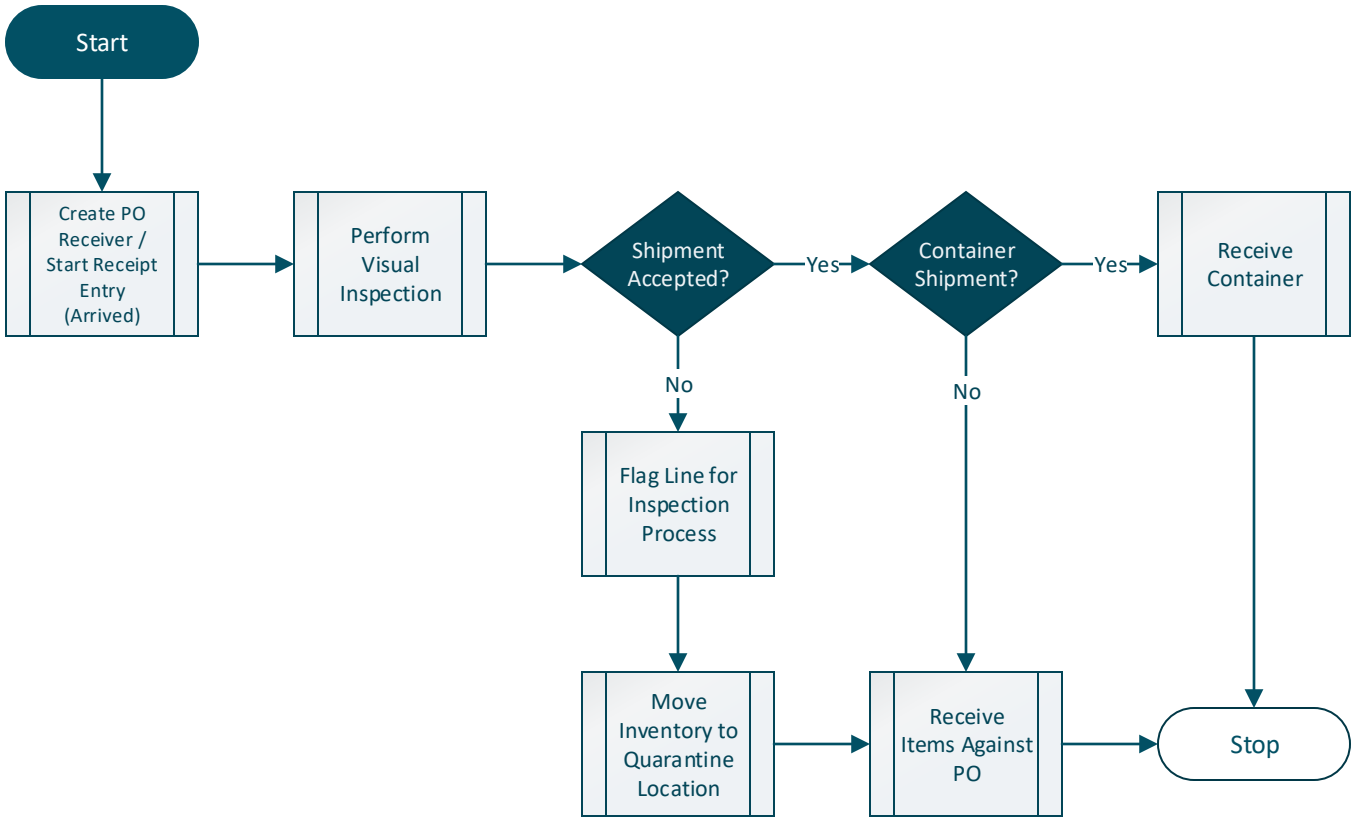


Role Assignment:
-Shipping / Receiving
License Requirements:

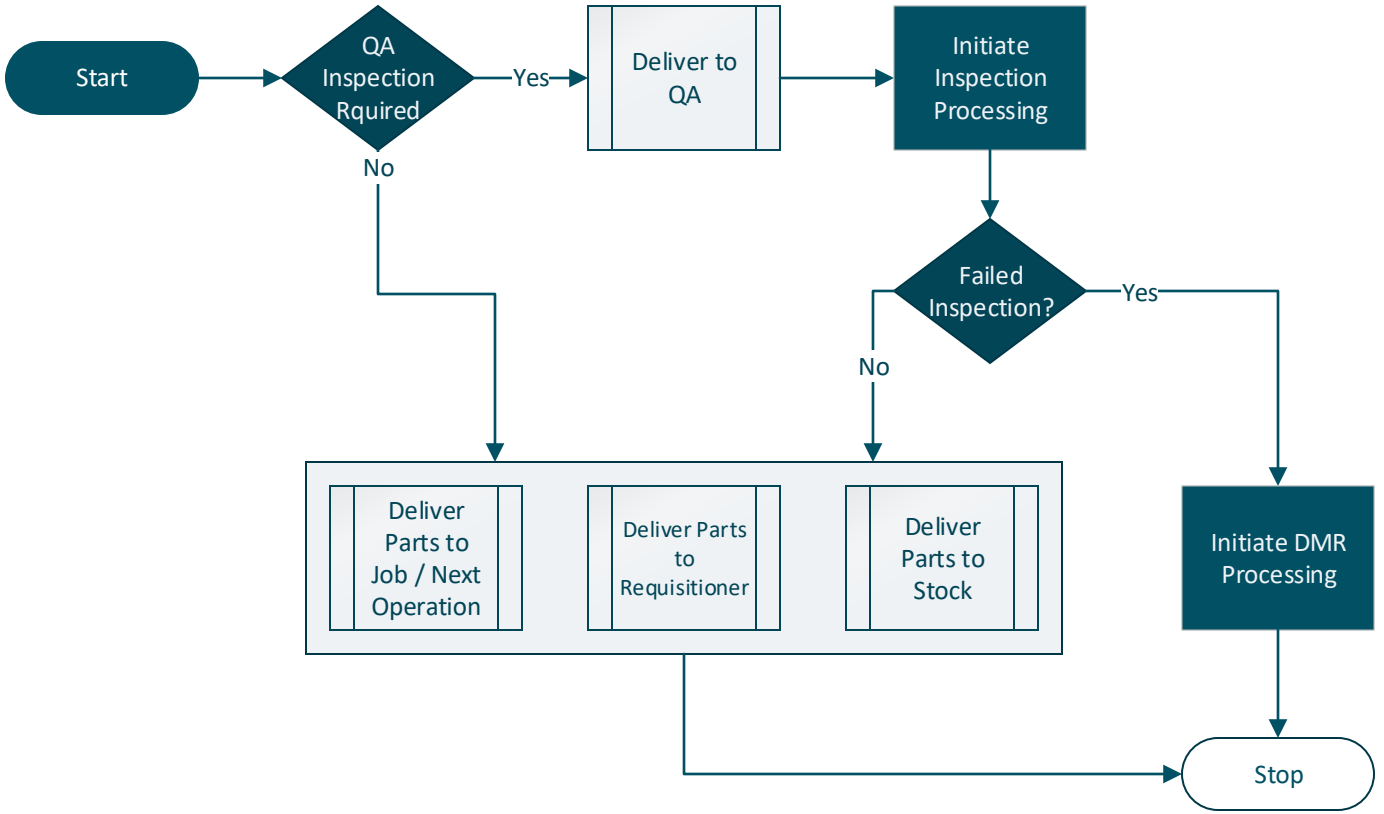
PROCESS: Receive from Suppliers



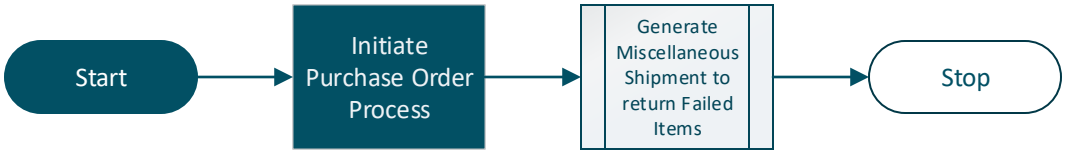
Role Assignment:
-Shipping / Receiving / Quality
License Requirements:



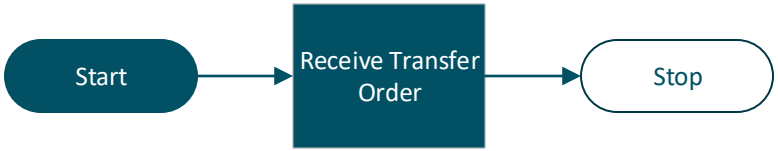
Role Assignment:
-Shipping / Receiving
License Requirements:



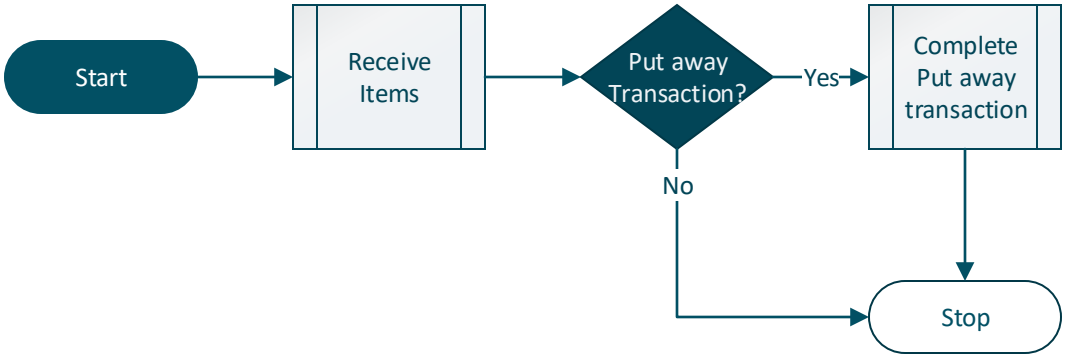
Role Assignment:
-Shipping / Receiving / Quality
License Requirements:



Role Assignment:
-Shipping / Receiving / Purchasing
License Requirements:

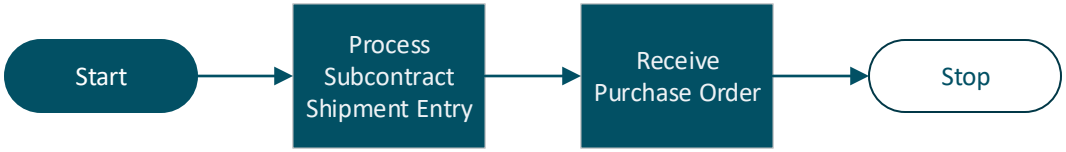


Role Assignment:
-Shipping / Receiving
License Requirements:

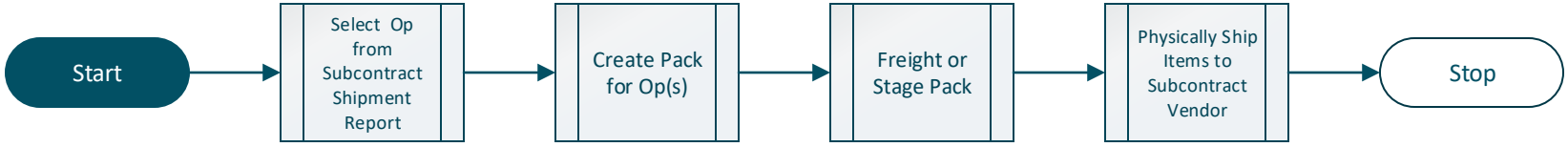


Role Assignment:
-Shipping / Receiving
License Requirements:

PROCESS: Subcontract Shipment

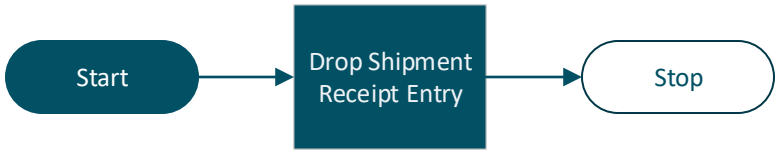


Role Assignment:
-Shipping / Receiving
License Requirements:



Role Assignment:
-Shipping / Receiving
License Requirements:

PROCESS: Drop Shipment Receipt



Role Assignment:
-Shipping / Receiving
License Requirements:

STAGE: Drop Shipment Receipt Entry

Role Assignment:
-Shipping / Receiving /Finance
License Requirements:

Accounts Receivable

FUNCTION MENU

SHIPPING AND RECEIVING MENU

New Customer Process

Invoice Customer

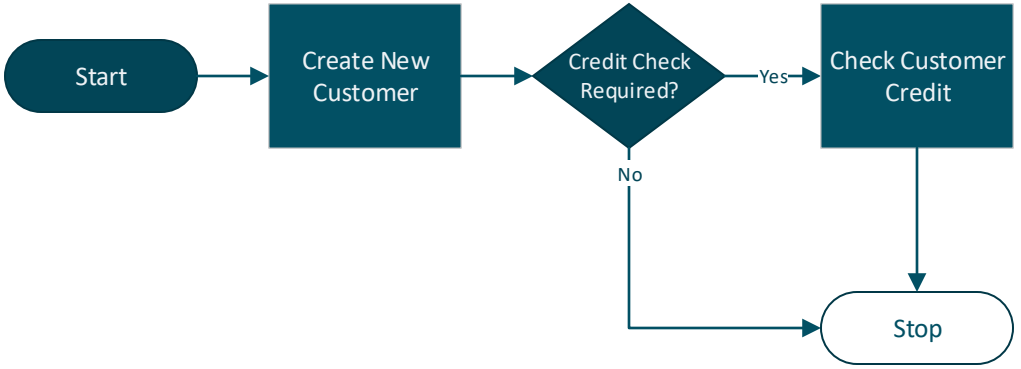
Customer Credit Check

Sales Tax Setup

Sales Tax Reporting

Customer Payments

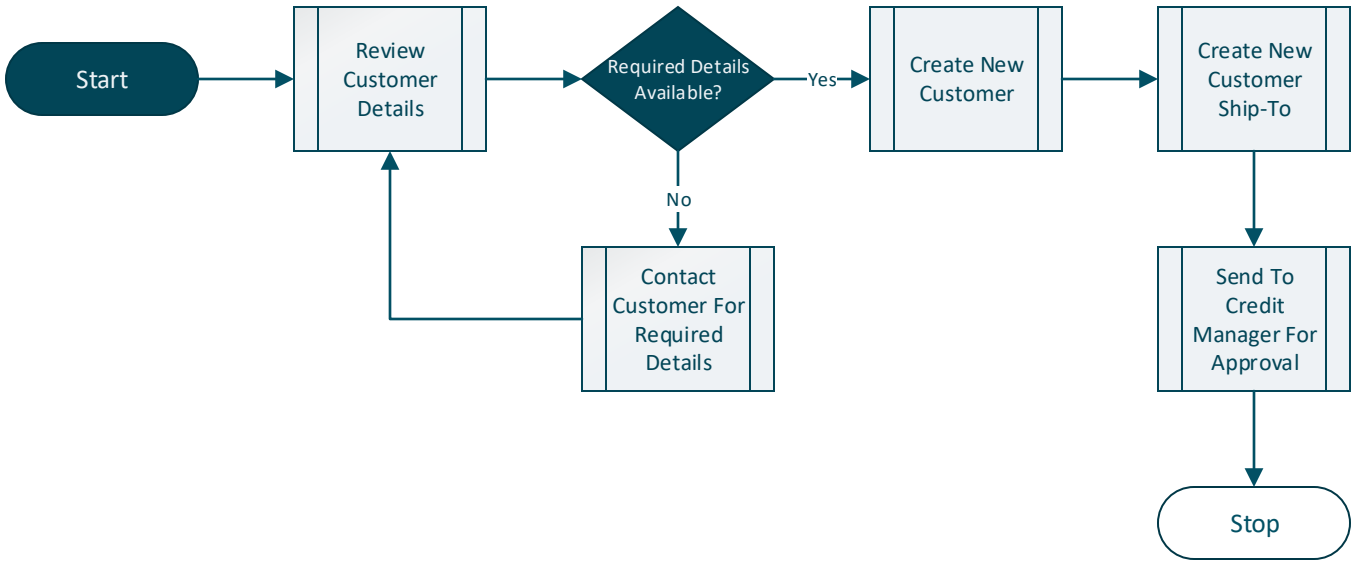
Process: New Customer



Role Assignments:
- Accounting Manager, Credit Manager

License Requirements:

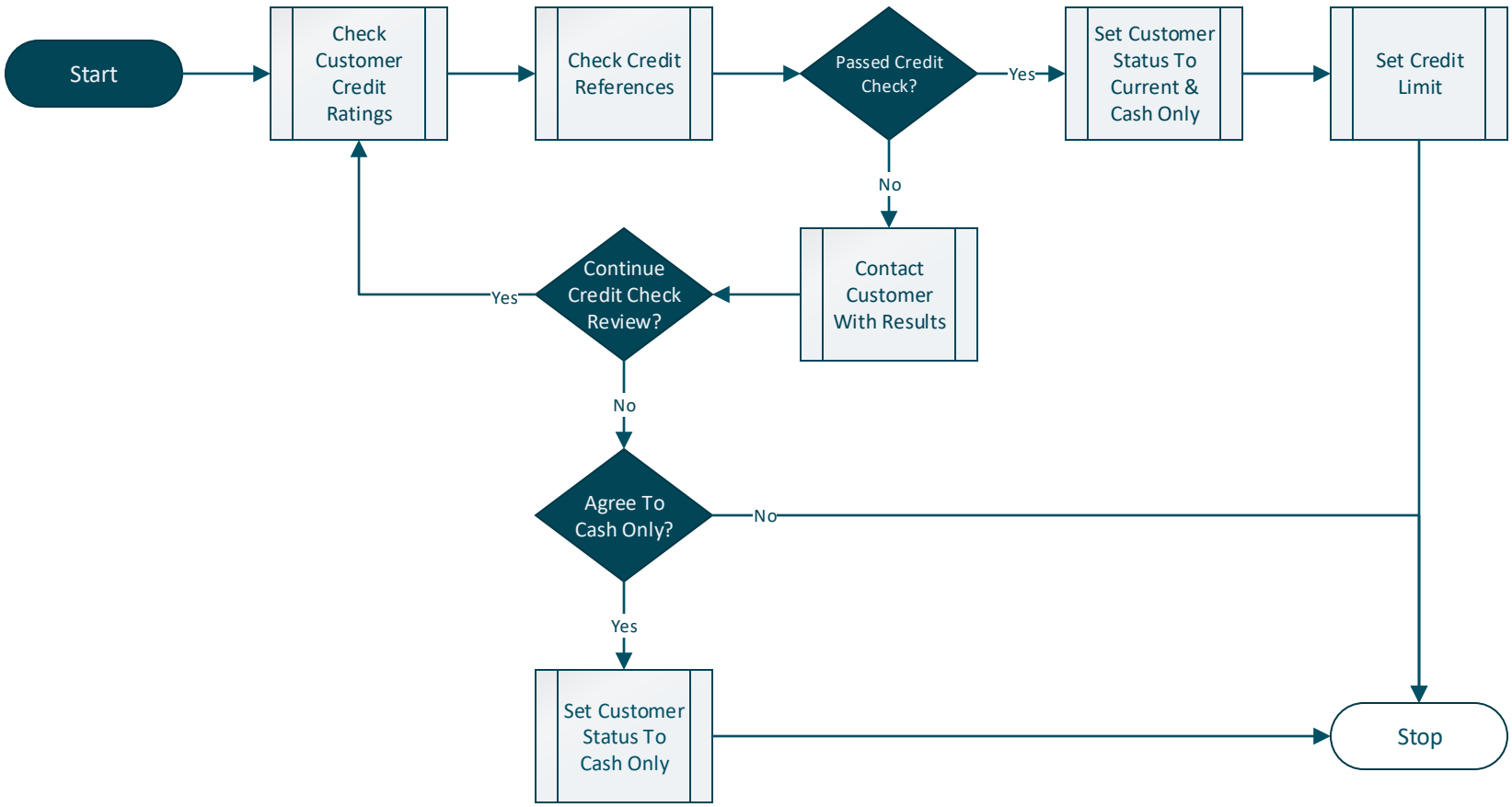
Stage: Create New Customer



Role Assignments:
- Accounting Manager, Credit Manager

License Requirements:

Stage: Check Customer Credit



Role Assignments:
- Accounting Manager, Credit Manager

License Requirements:

PROCESS: Invoice Customer

Role Assignment:
- AR Entry

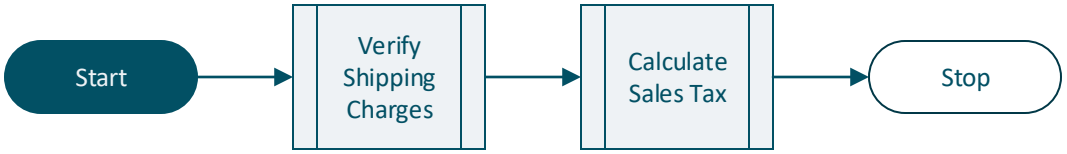
License Requirements:

STAGE: Create New AR Group

Role Assignment:
- AR Entry

NOTES: A price list or discount price list attached to a customer group applies to all customers within that group, Use customer groups to sort the Sales Order Backlog Report, Sales Analysis Report, and the Sales Gross Margin Report.

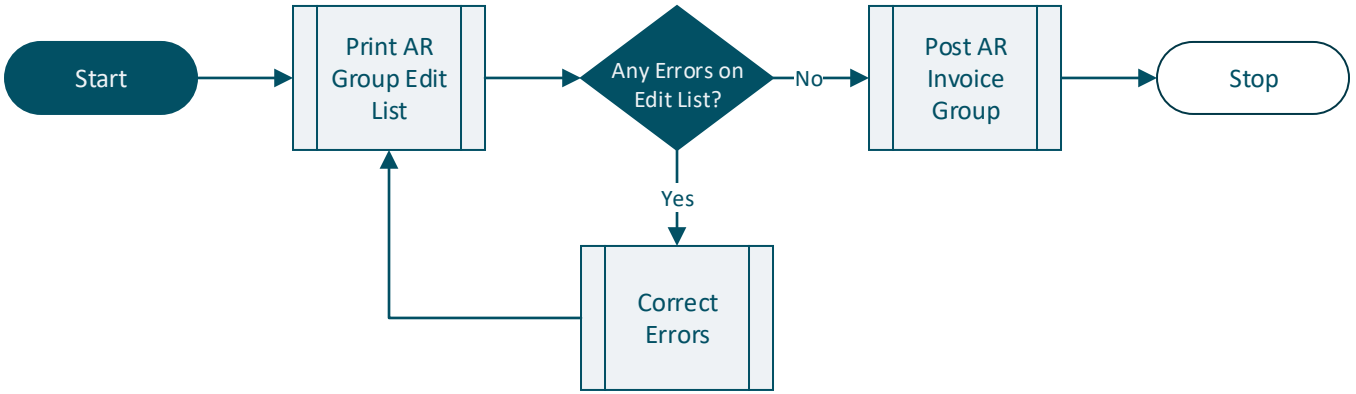
License Requirements:



Role Assignment:
- AR Entry

License Requirements:

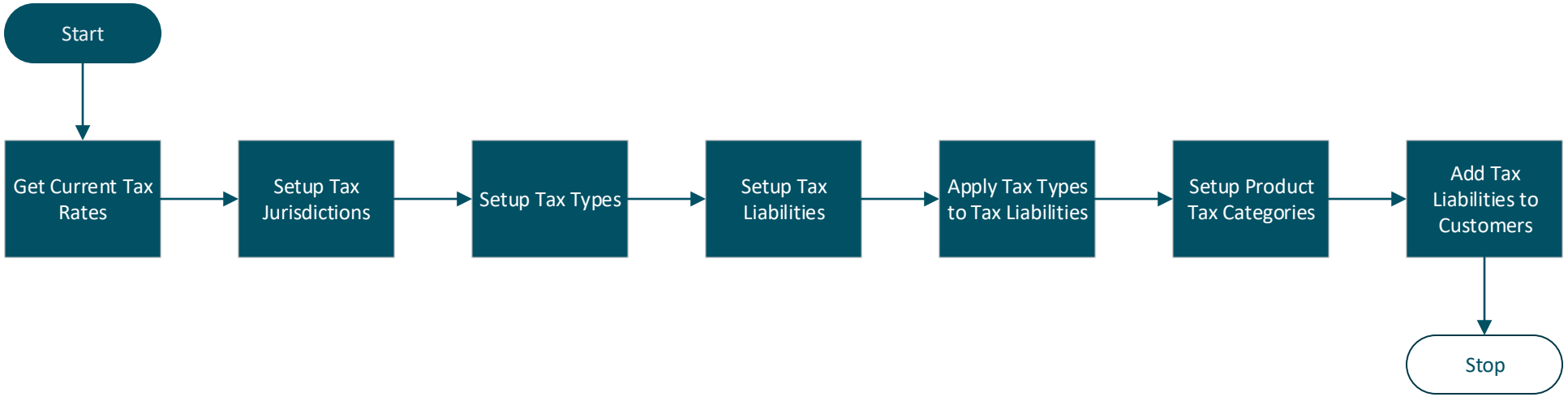
STAGE: Post AR Invoices



Role Assignment:
- AR Entry

License Requirements:

PROCESS: Sales Tax Setup

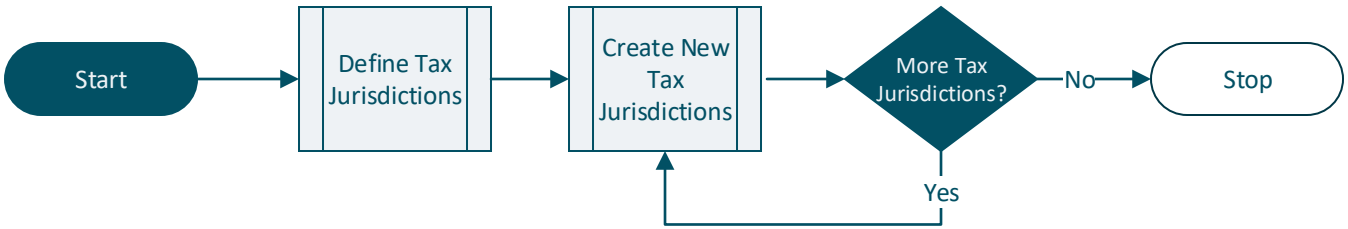


Role Assignment:
- AR Entry

License Requirements:

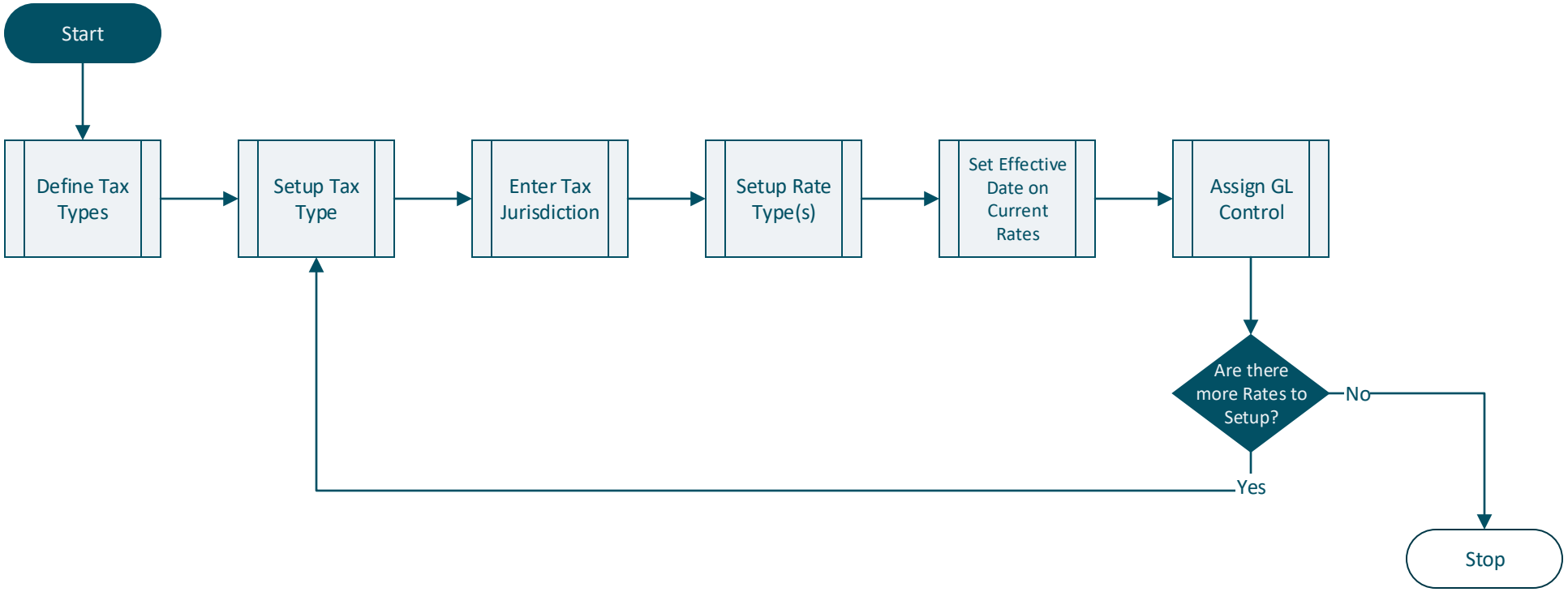
Role Assignment:
- AR Clerk

License Requirements:



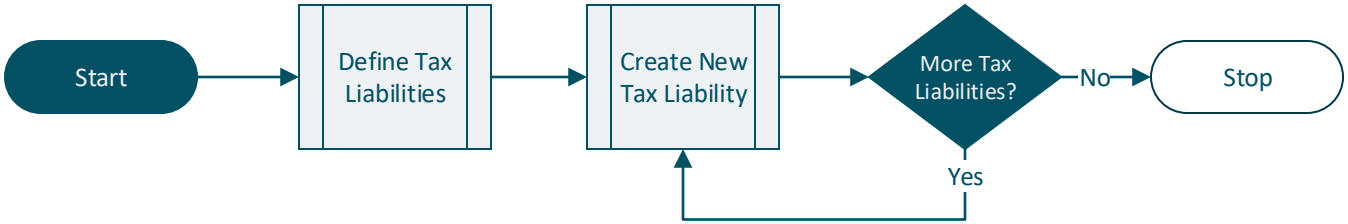
Role Assignment:
- AR Entry

License Requirements:



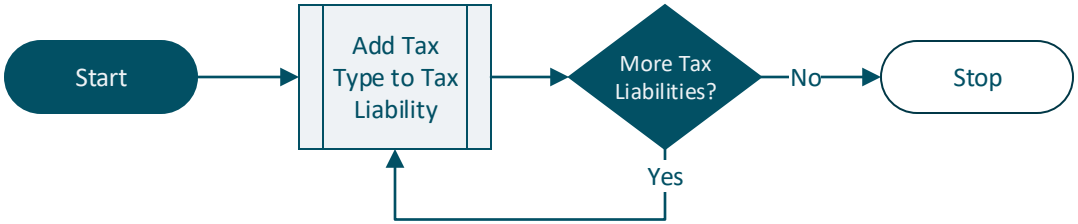
Role Assignment:
- AR Entry

License Requirements:



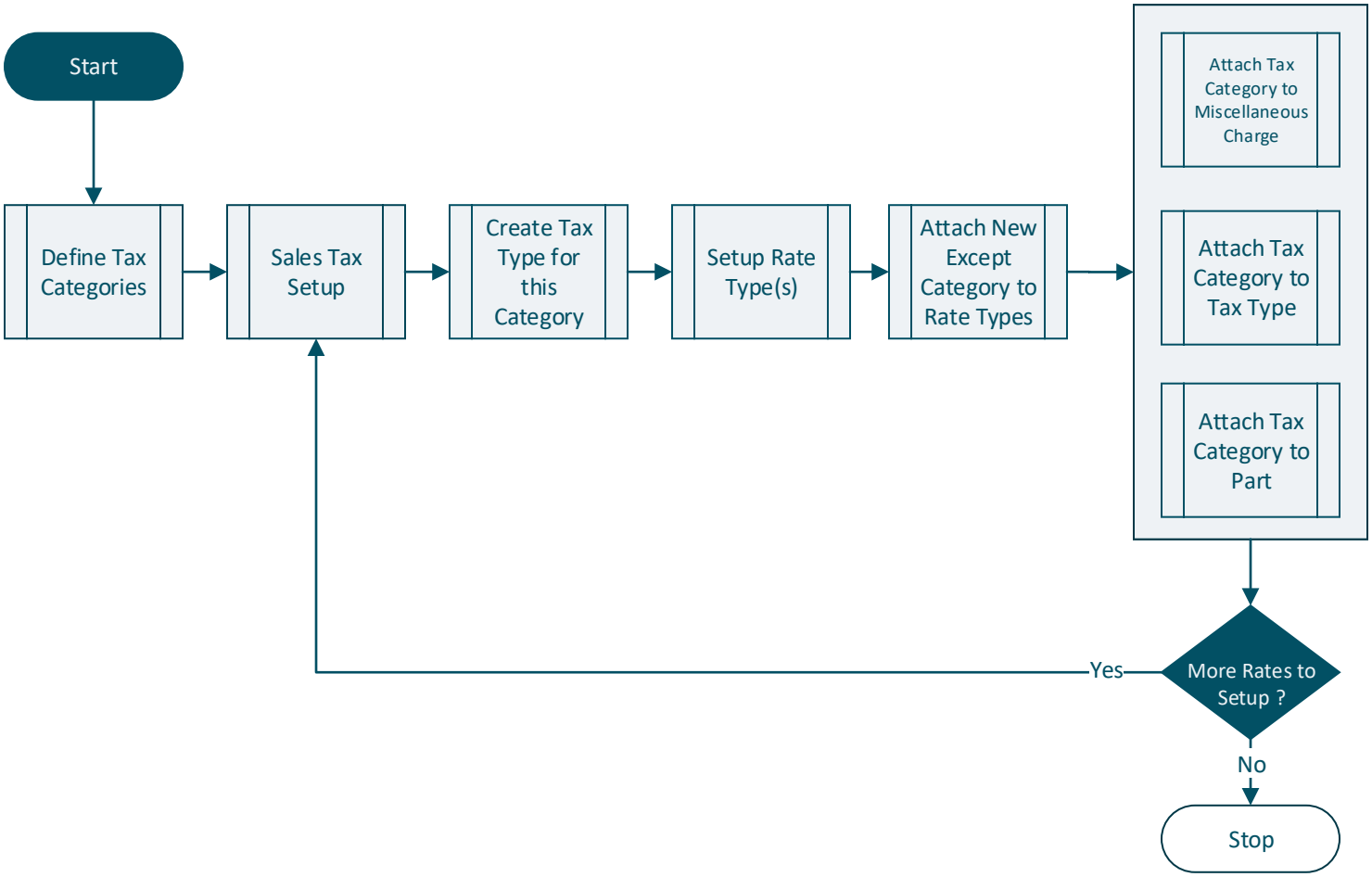
Role Assignment:
- AR Clerk

License Requirements:



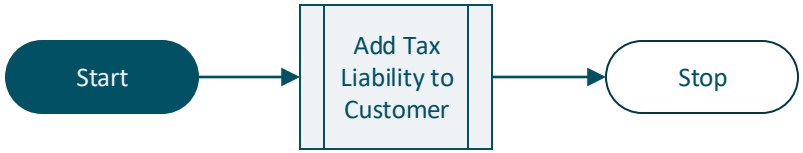
Role Assignment:
- AR Clerk

License Requirements:



Role Assignment:
- AR Entry

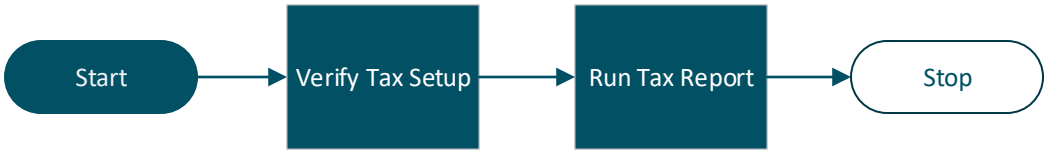
License Requirements:



Role Assignment:
- AR Clerk

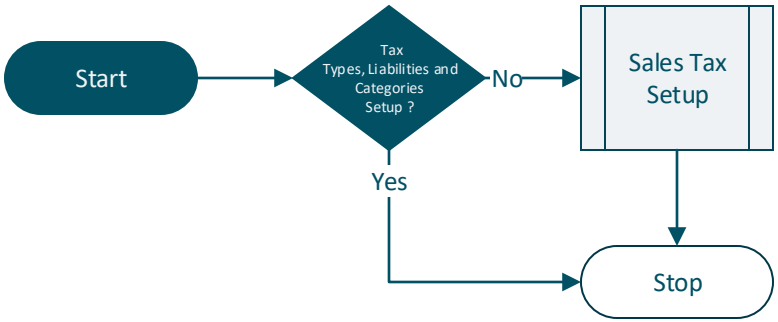
License Requirements:

PROCESS: Sales Tax Reporting



Role Assignment:
- AR Entry

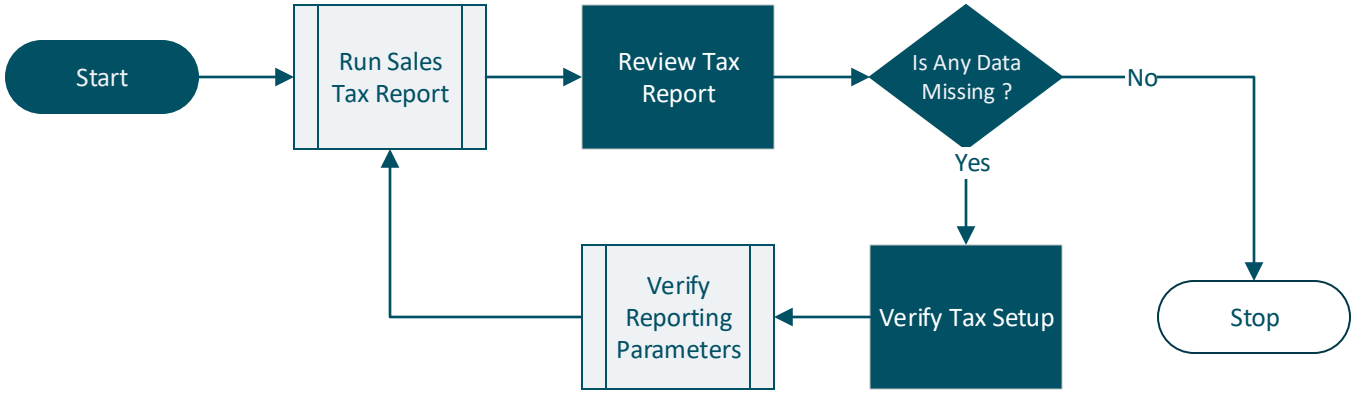
License Requirements:



Role Assignment:
- AR Entry

License Requirements:

STAGE: Run Tax Report



Role Assignment:
- AR Entry

License Requirements:

Role Assignment:
- AR Entry

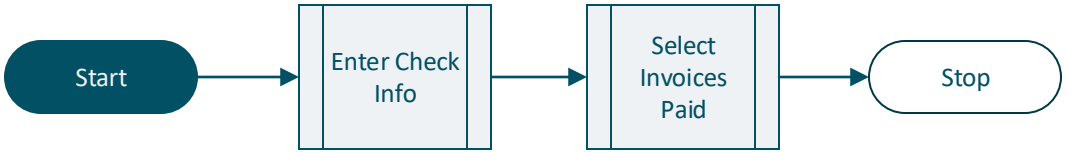
License Requirements:

STAGE: Create Cash Receipts Group

Role Assignment:
- AR Entry

License Requirements:

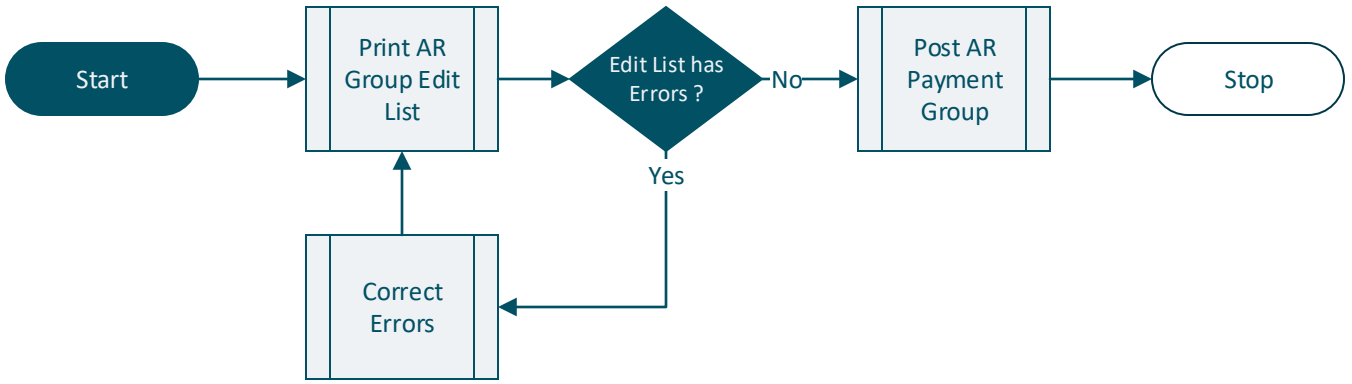
STAGE: Enter Checks and Match Invoices



Role Assignment:
- AR Entry

License Requirements:

STAGE: Post AR Payment Group



Role Assignment:
- AR Entry

License Requirements:

Accounts Payable

FUNCTION MENU

AR MENU

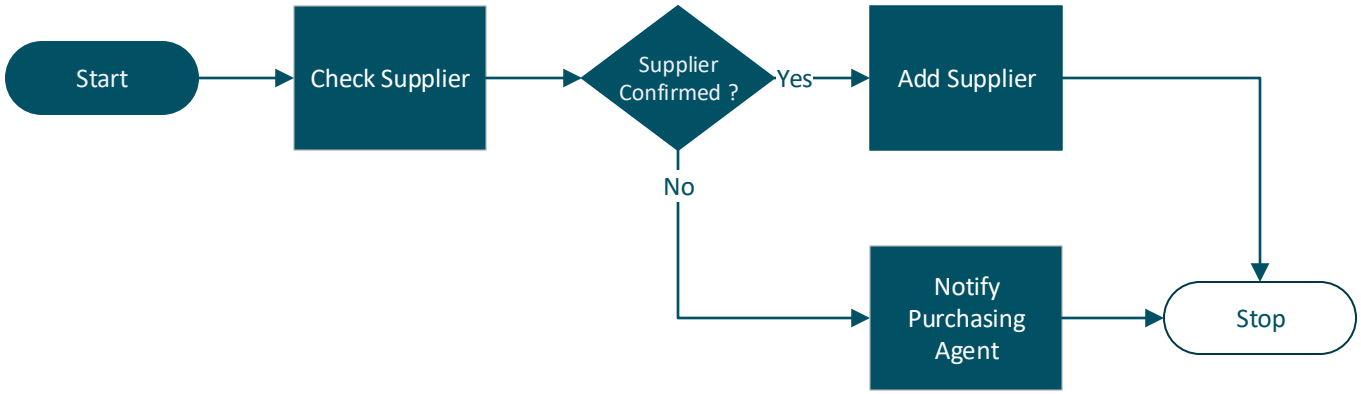
New Supplier Process

Supplier Payments

Supplier Invoices

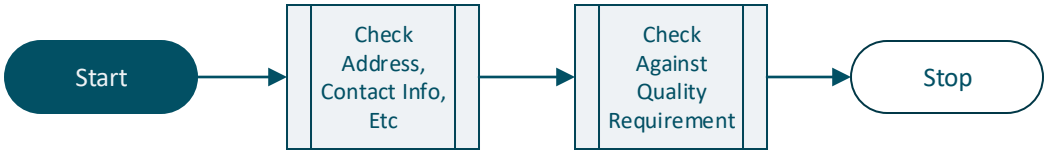
Process Landed Cost

PROCESS: New Supplier



Role Assignment:
- AP Entry, Accounting Manager

License Requirements:



Role Assignment:
- AP Entry, Accounting Manager

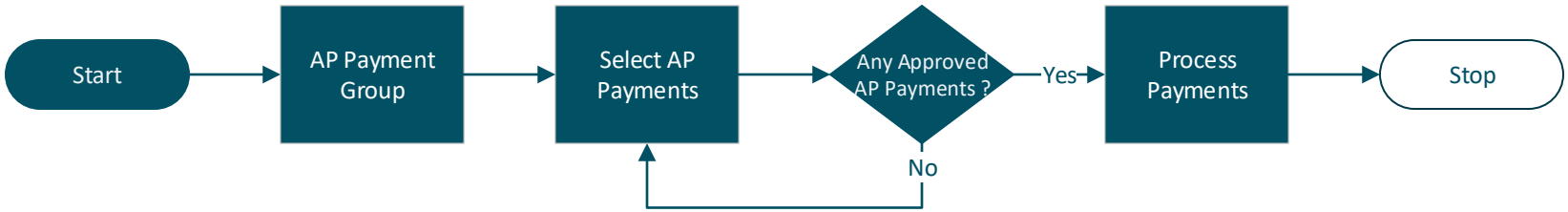
License Requirements:

Role Assignment:
- AP Entry, Accounting Manager

License Requirements:

Role Assignment:
- AP Entry, Accounting Manager

License Requirements:



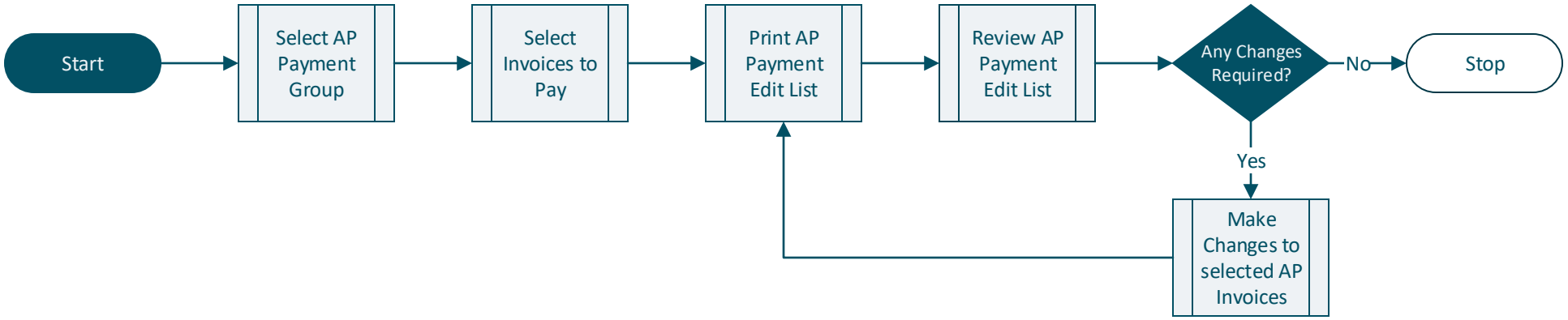
Role Assignment:
- AP Entry

License Requirements:

Role Assignment:
- AP Entry

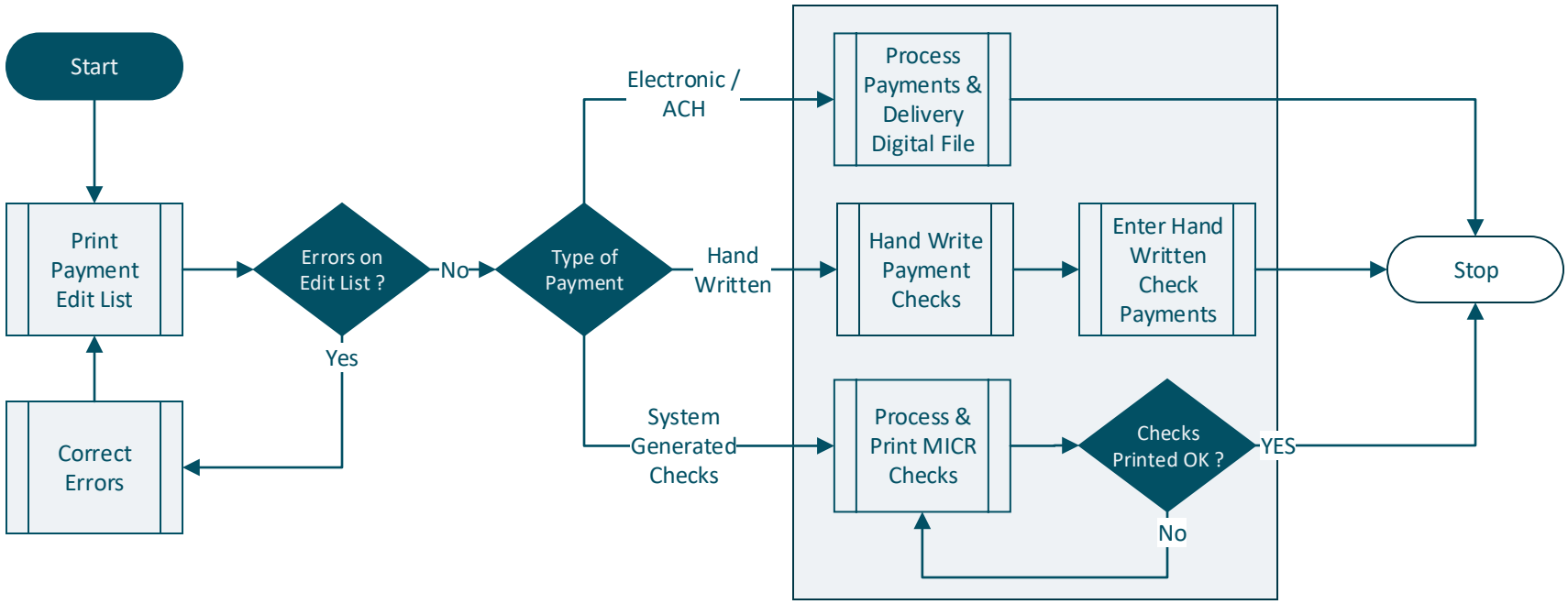
License Requirements:

STAGE: Select Payments to Process



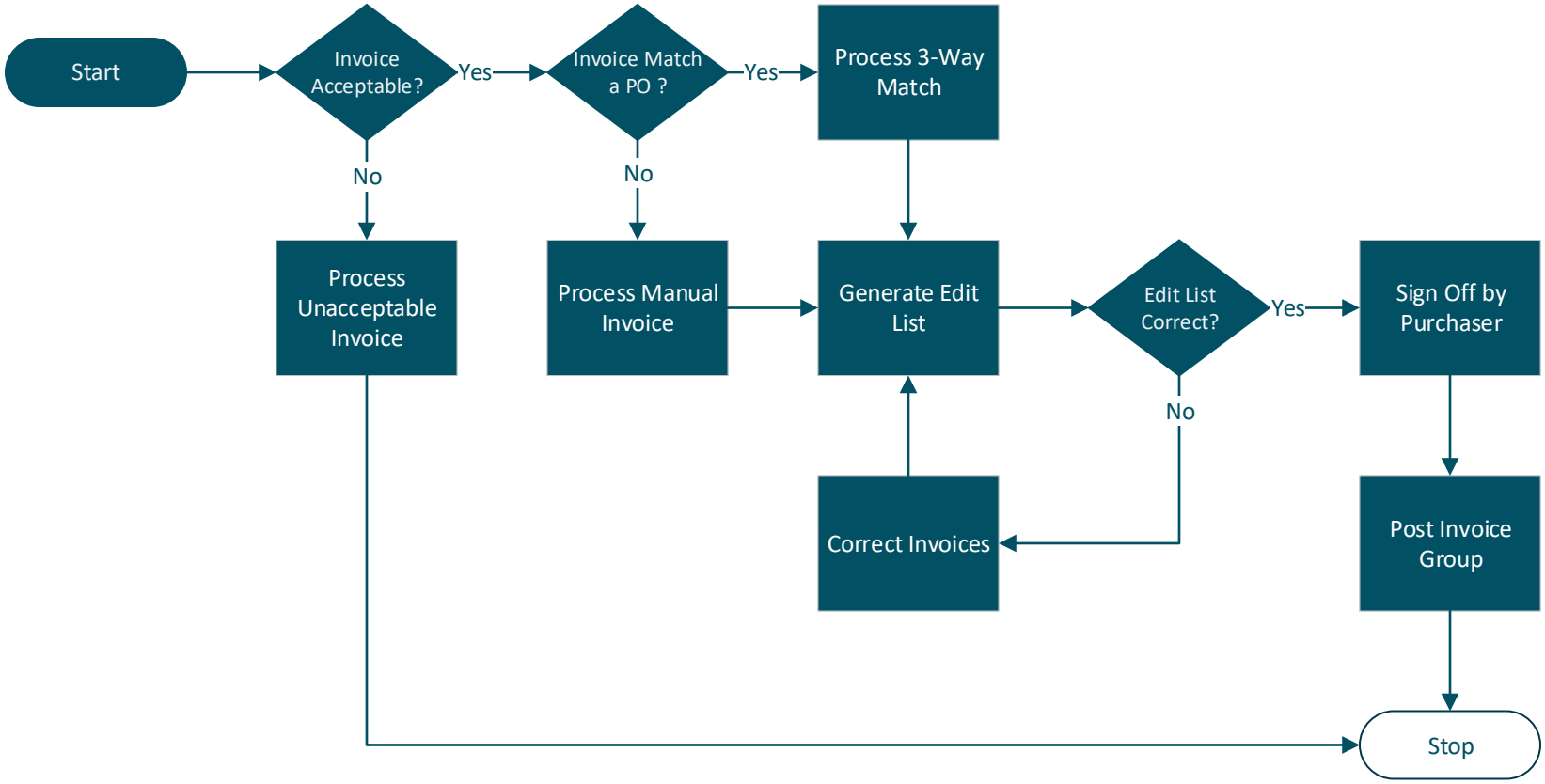
Role Assignment:
- AP Entry

License Requirements:



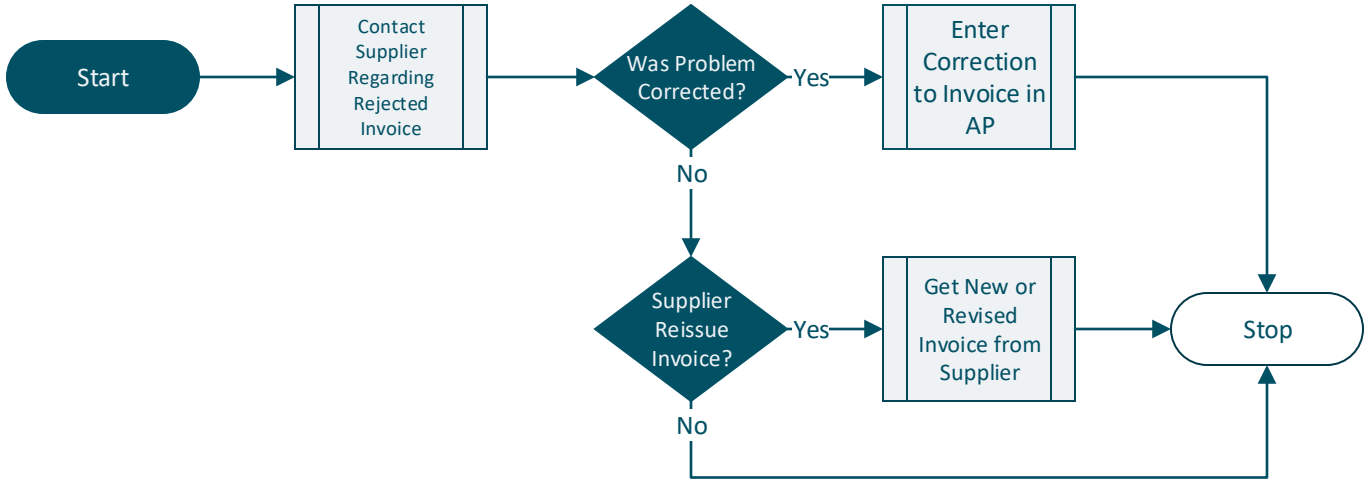
Role Assignment:
- AP Entry

License Requirements:



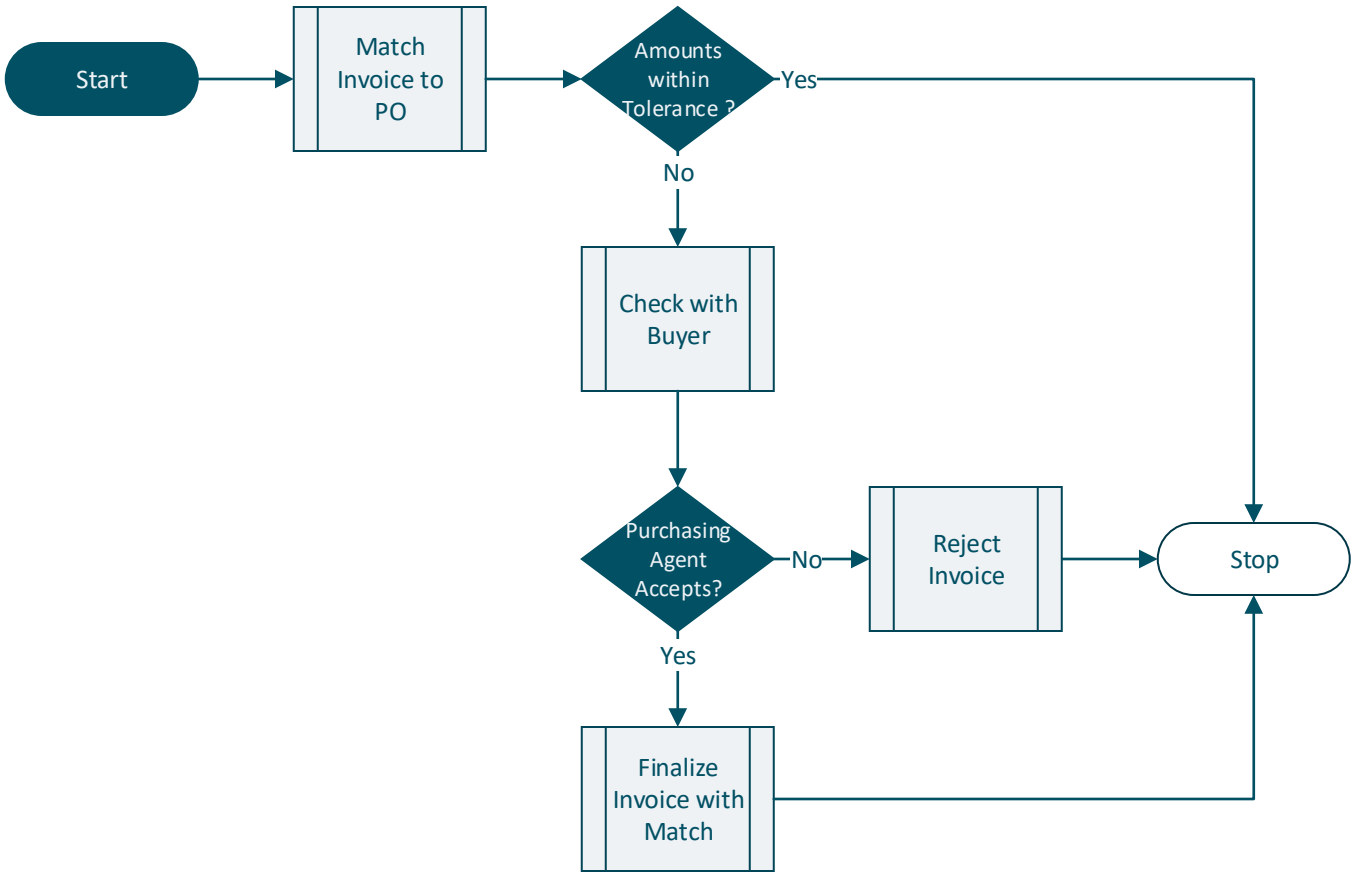
Role Assignment:
- AP Entry, Purchasing

License Requirements:



Role Assignment:
- AP Entry

License Requirements:



Role Assignment:
- AP Entry, Purchasing Agent

License Requirements:

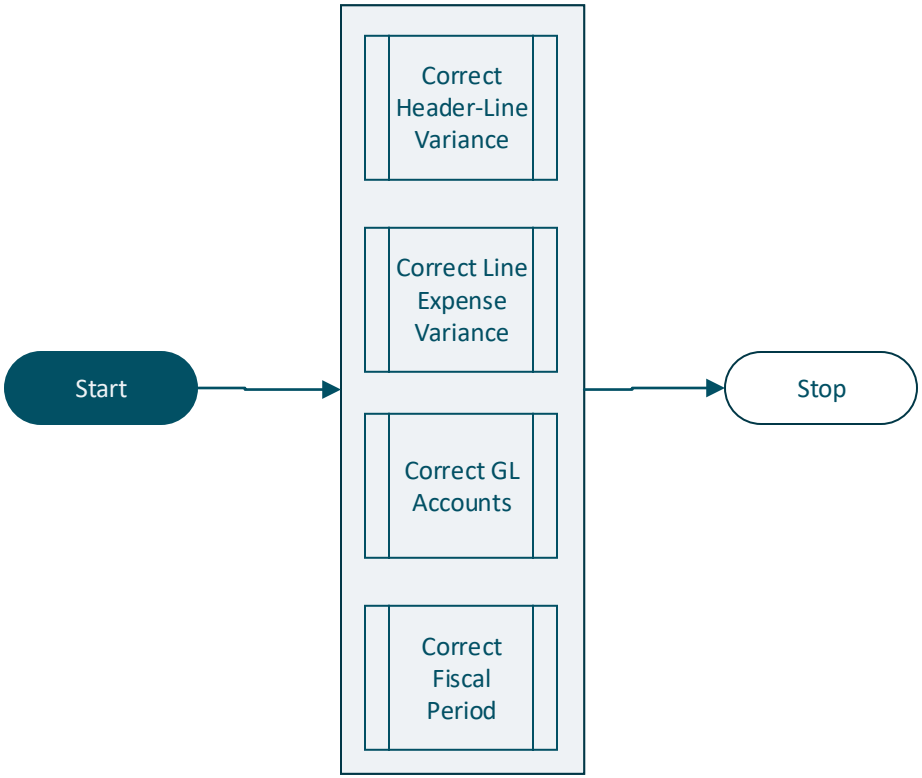
Role Assignment:
- AP Entry

License Requirements:

STAGE: Generate Edit List

Role Assignment:
- AP Entry

License Requirements:



Role Assignment:
- AP Entry

License Requirements:

STAGE: Sign Off by Purchaser

Role Assignment:
- Purchasing Agent

License Requirements:

STAGE: Post Invoice Group

Role Assignment:
- AP Entry

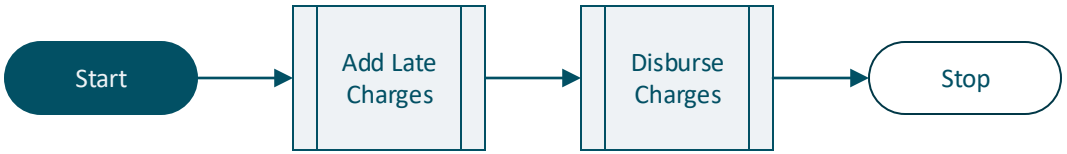
License Requirements:

PROCESS: Process Landed Cost

Role Assignment:
- AP Entry

License Requirements:

STAGE: Process Landed Cost Late Charges



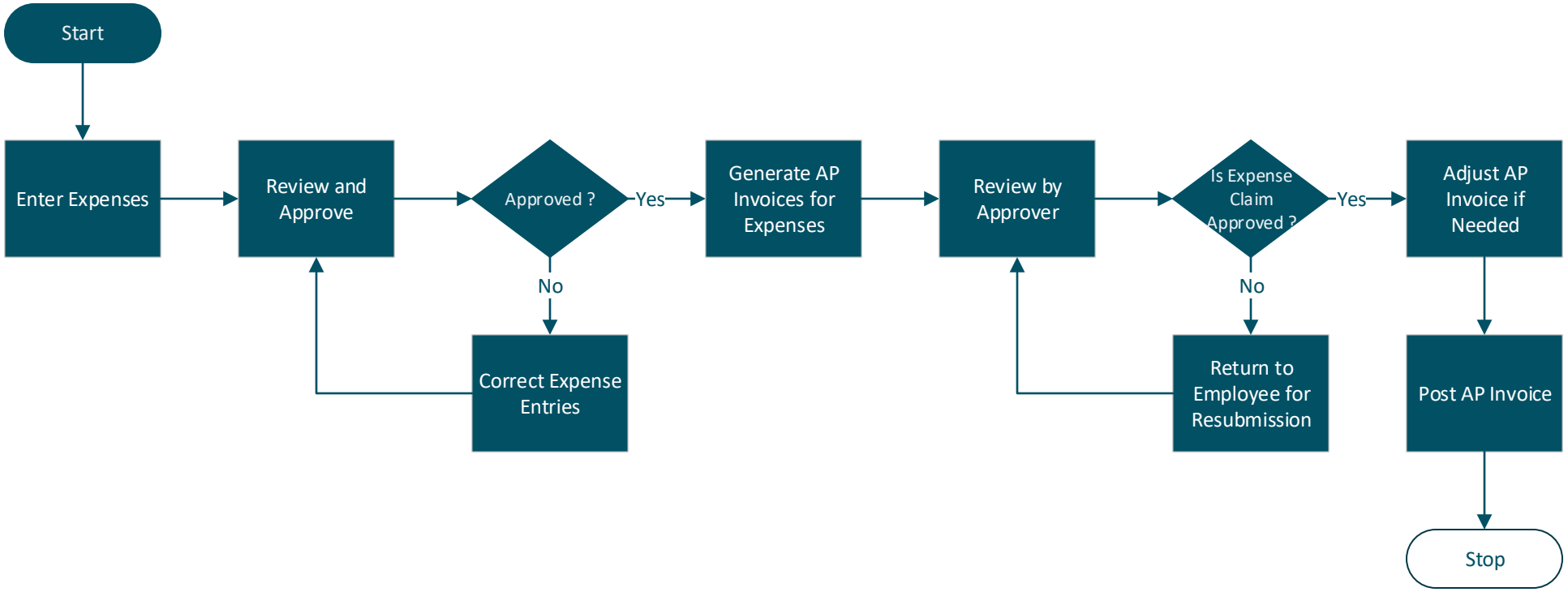
Role Assignment:
- AP Entry

NOTE: Late Costs can be from actual invoice or estimated amounts

License Requirements:

Expense Management

FUNCTION MENU | **PROCESS: Employee Expenses** | LANDED COST PROCESSING | EXPENSE MGMT

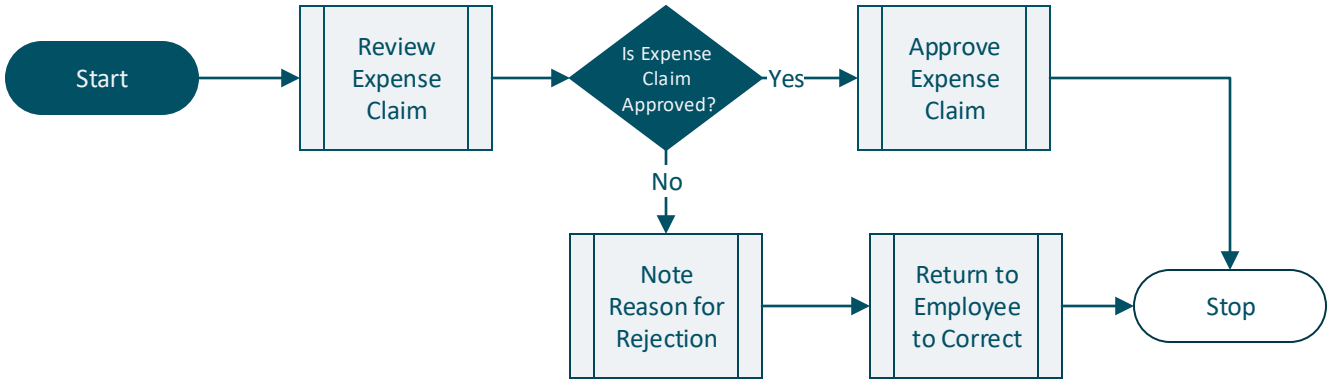


Role Assignment:
- AP Entry, Field Service Technician, Sales

License Requirements:

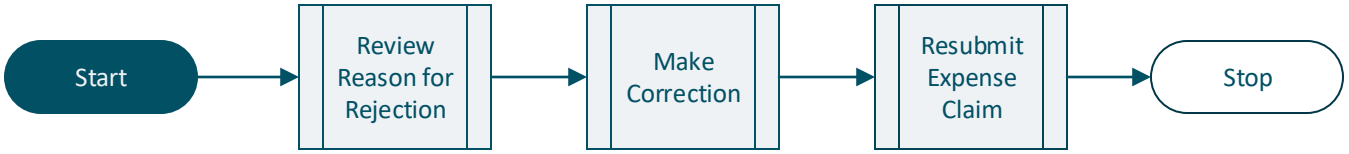
Role Assignment:
- Field Service Technician, Sales

License Requirements:



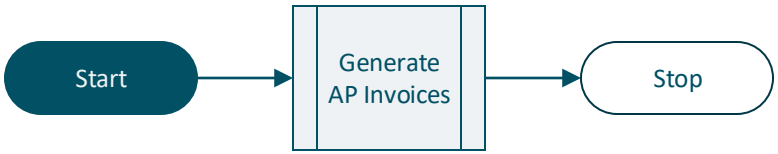
Role Assignment:
- AP Entry

License Requirements:



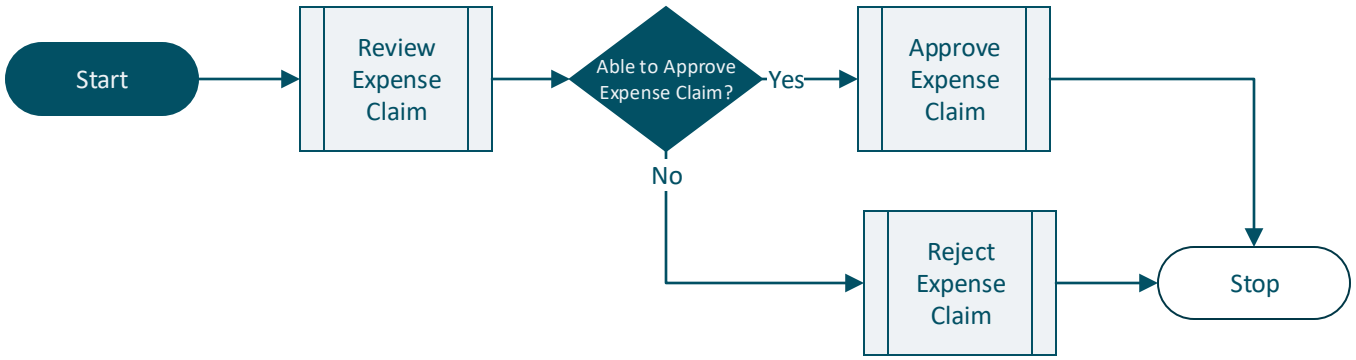
Role Assignment:
- AP Entry

License Requirements:



Role Assignment:
- AP Entry

License Requirements:

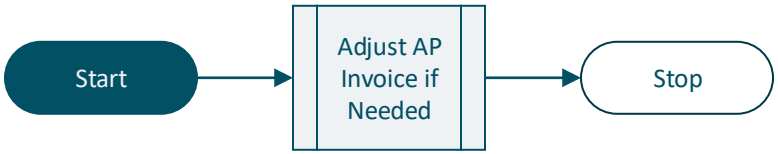


Role Assignment:
- AP Entry

License Requirements:

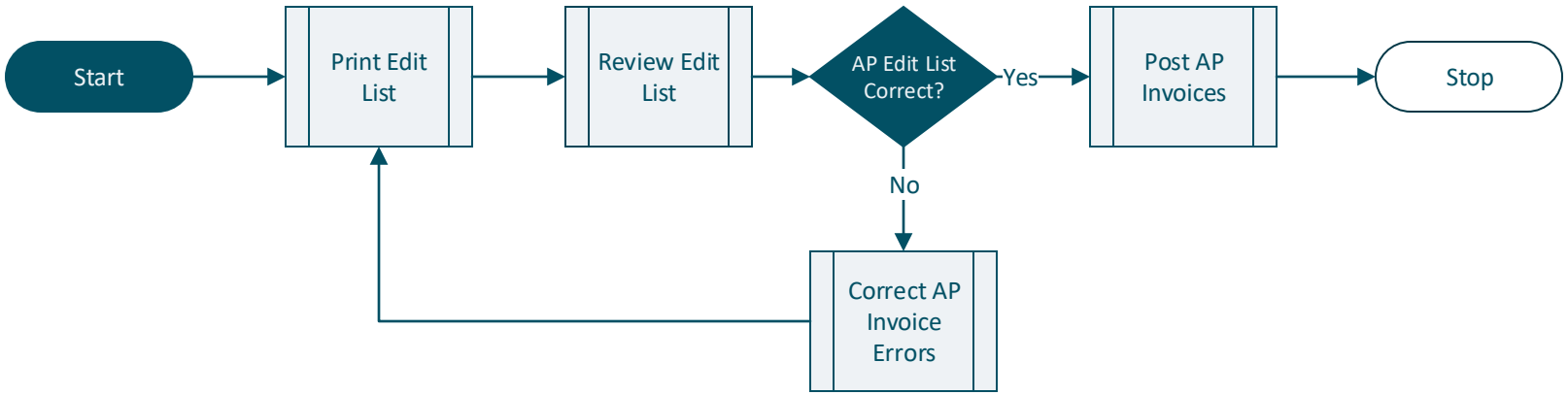
Role Assignment:
- AP Entry

License Requirements:



Role Assignment:
- AP Entry

License Requirements:

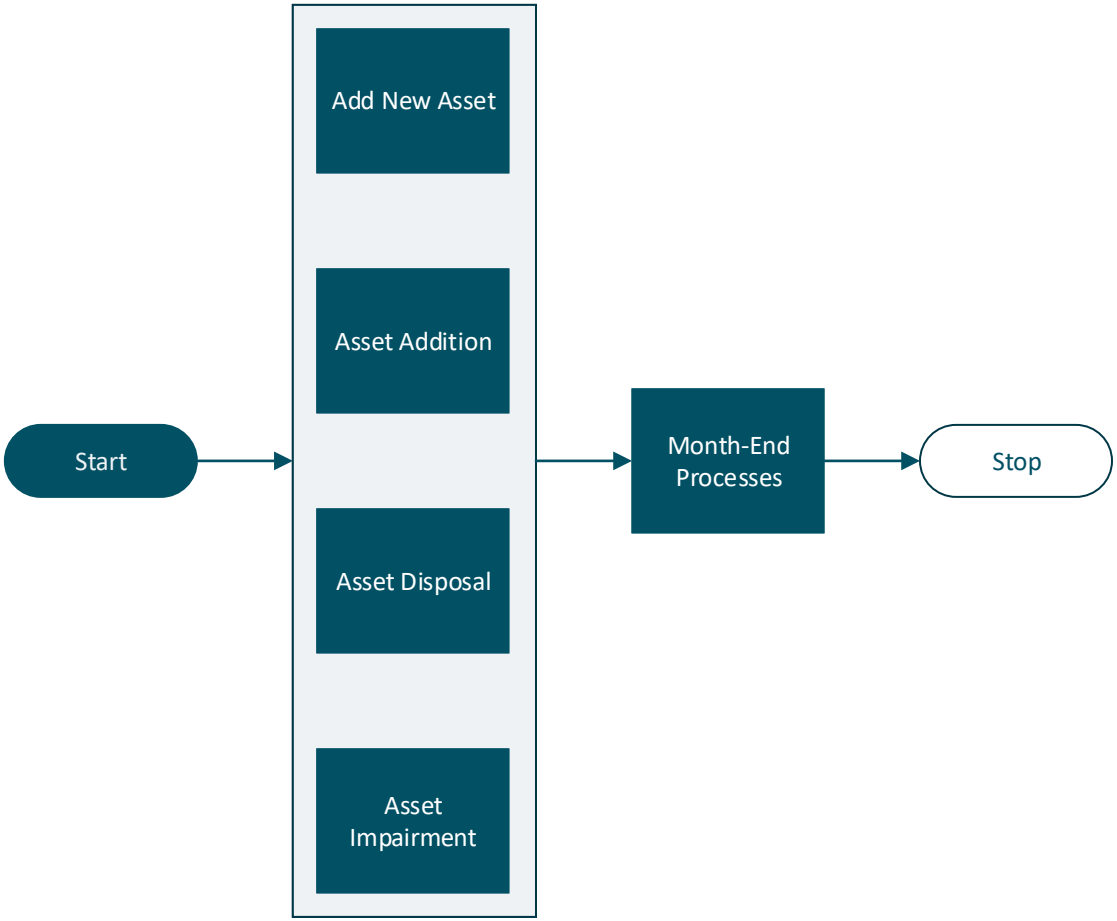


Role Assignment:
- AP Entry

License Requirements:

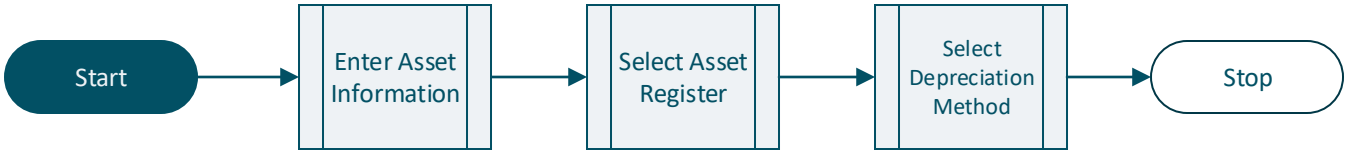
Maintain Assets

Periodic Asset Processes



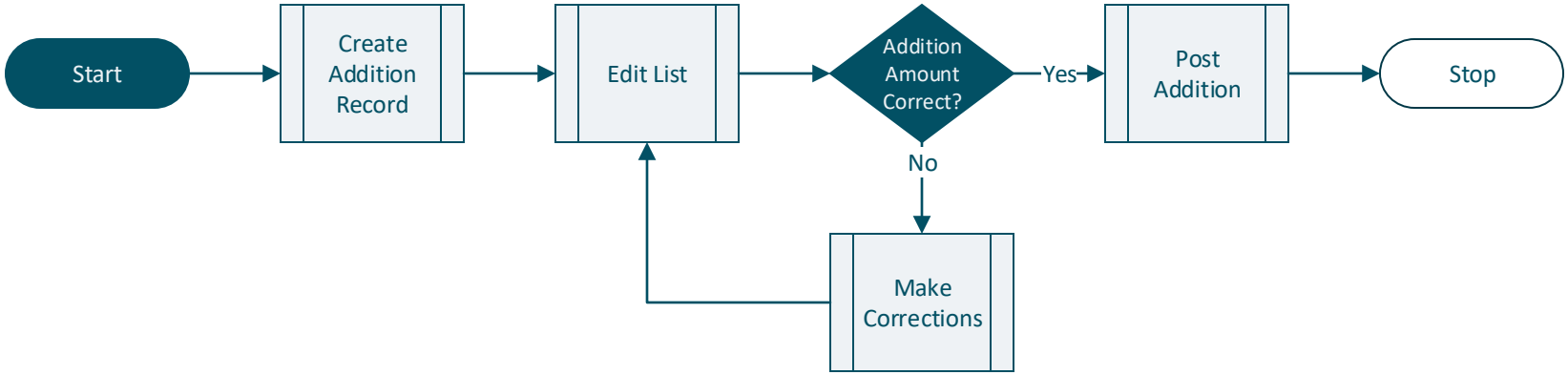
Role Assignment:
- Accounting Manager

License Requirements:



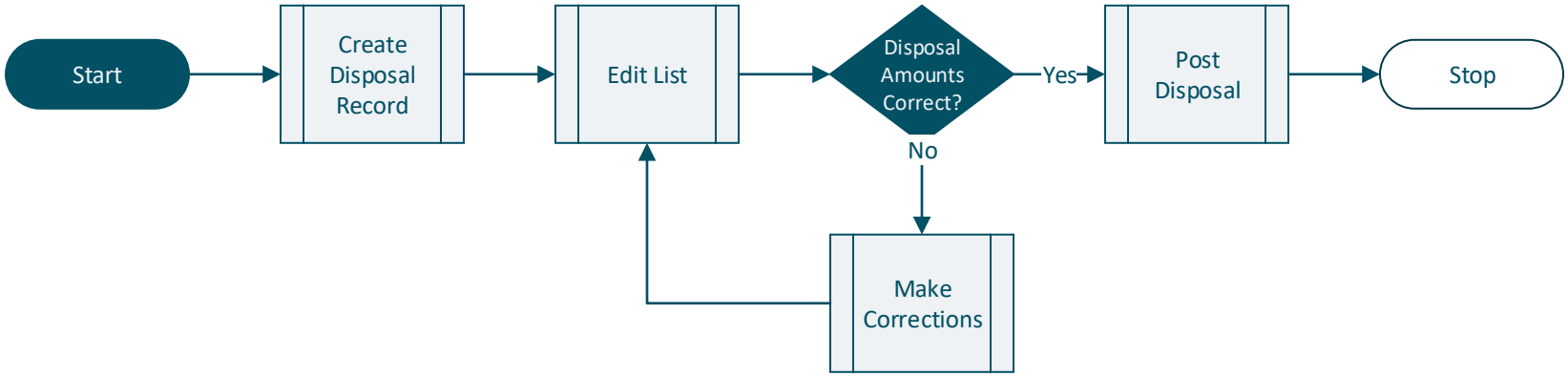
Role Assignment:
- Accounting Manager

License Requirements:



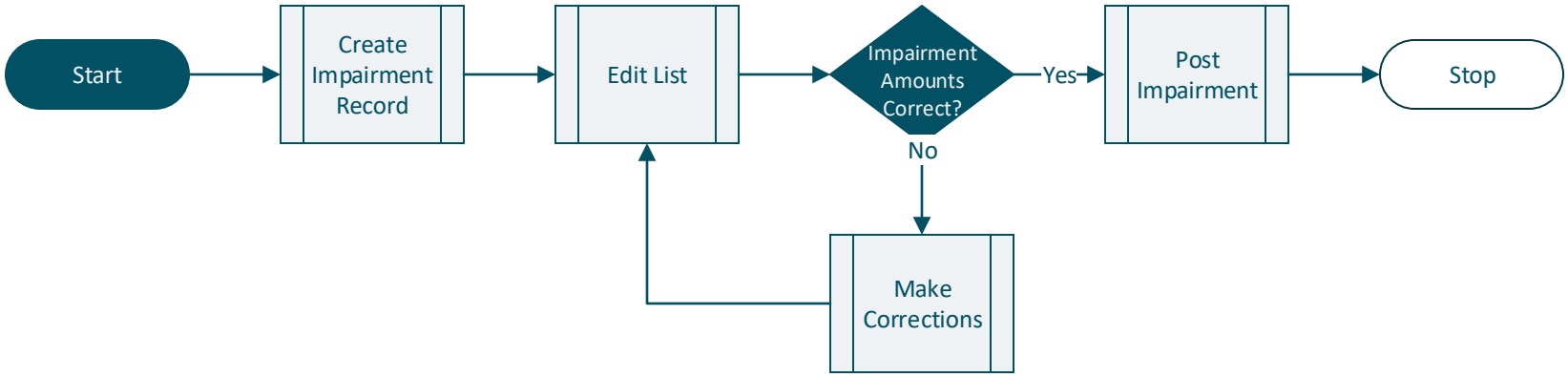
Role Assignment:
- Accounting Manager

License Requirements:



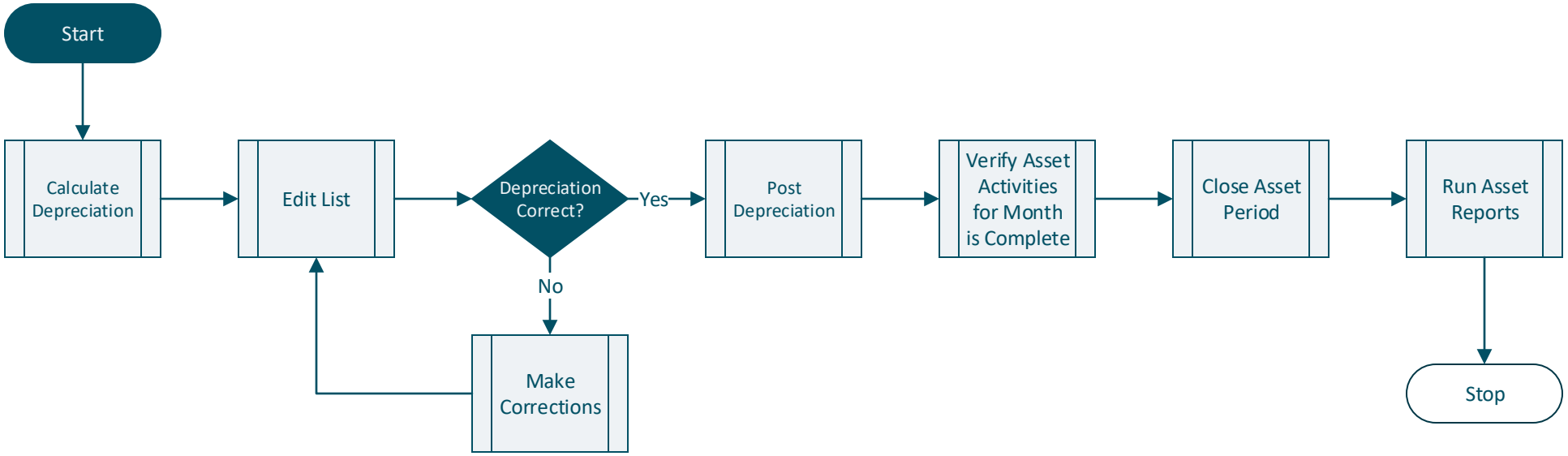
Role Assignment:
- Accounting Manager

License Requirements:



Role Assignment:
- Accounting Manager

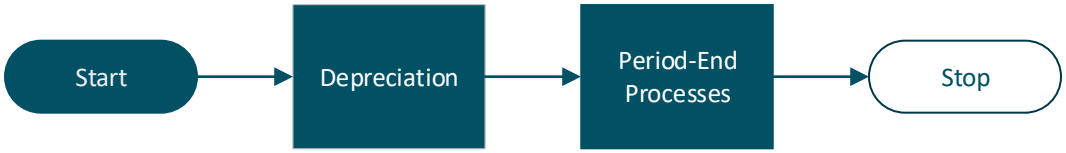
License Requirements:



Role Assignment:
- Accounting Manager

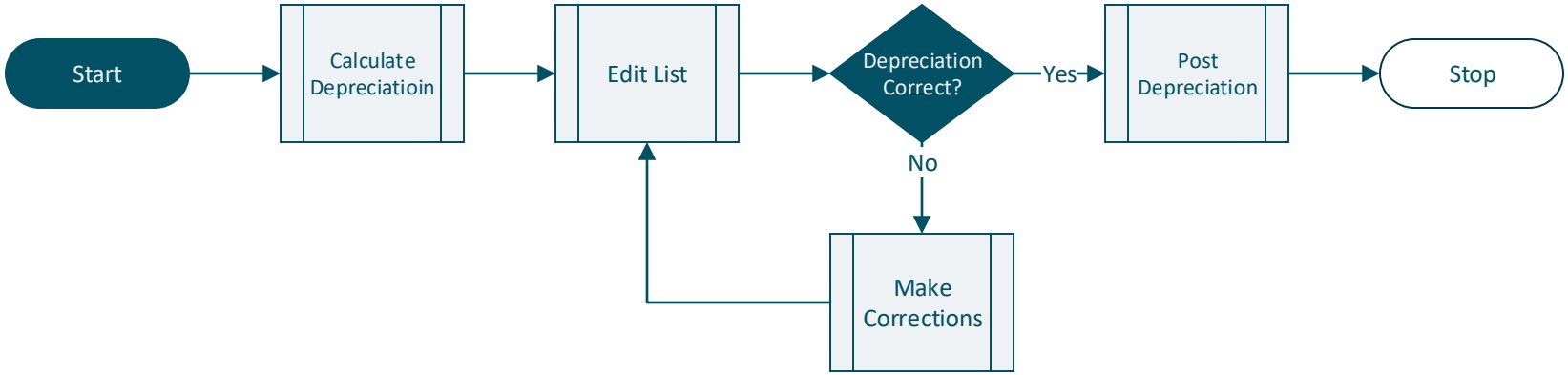
License Requirements:

PROCESS: Periodic Asset Processes



Role Assignment:
- Accounting Manager

License Requirements:



Role Assignment:
- Accounting Manager

License Requirements:

Role Assignment:
- Accounting Manager

License Requirements:

General Ledger

FUNCTION MENU

ASSETS MGMT MENU

End of Period Processing

Bank Recon-ciliation

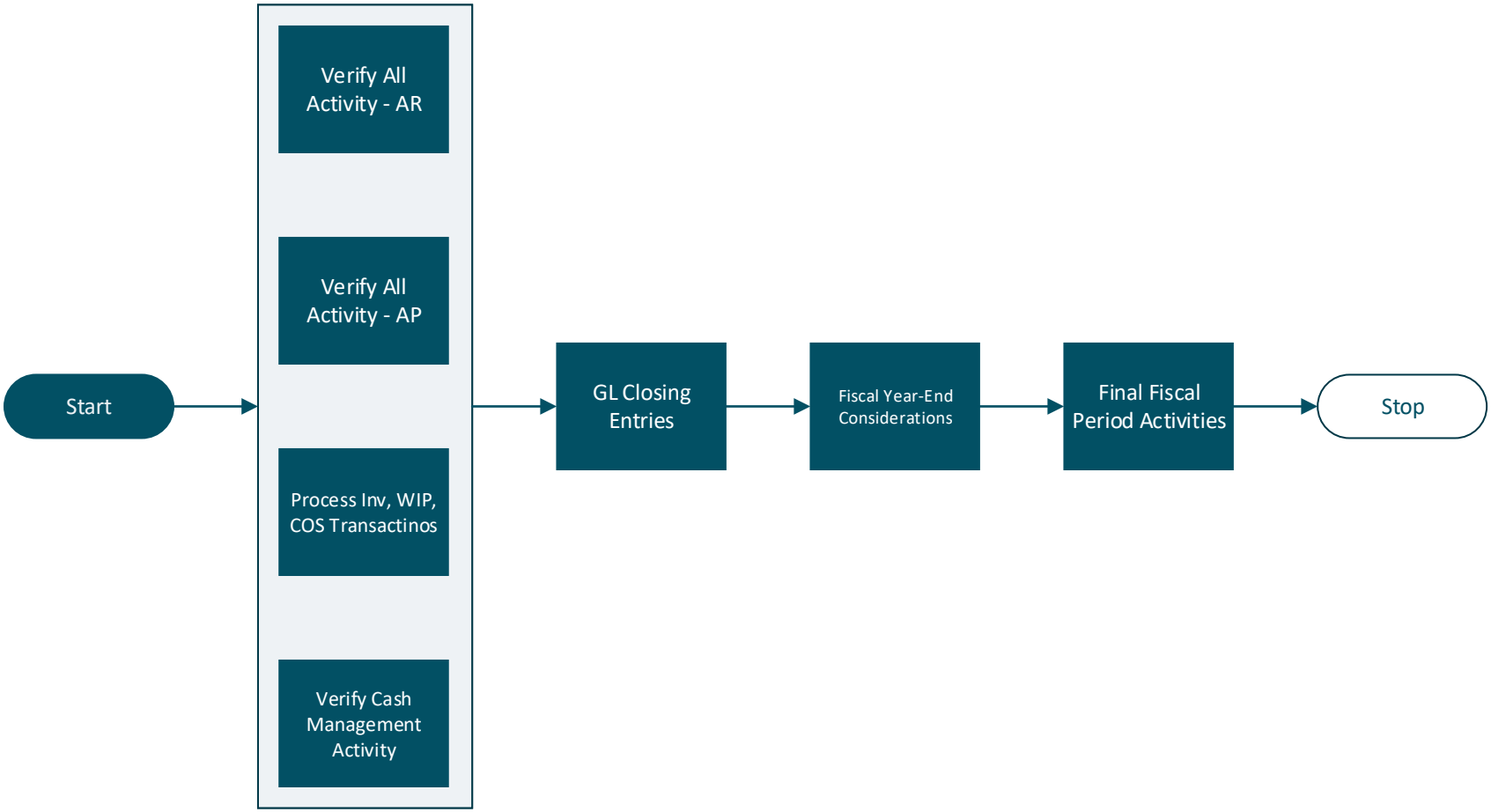
Budgeting

Financial Reporting

Create New GL Accounts

Journal Entries

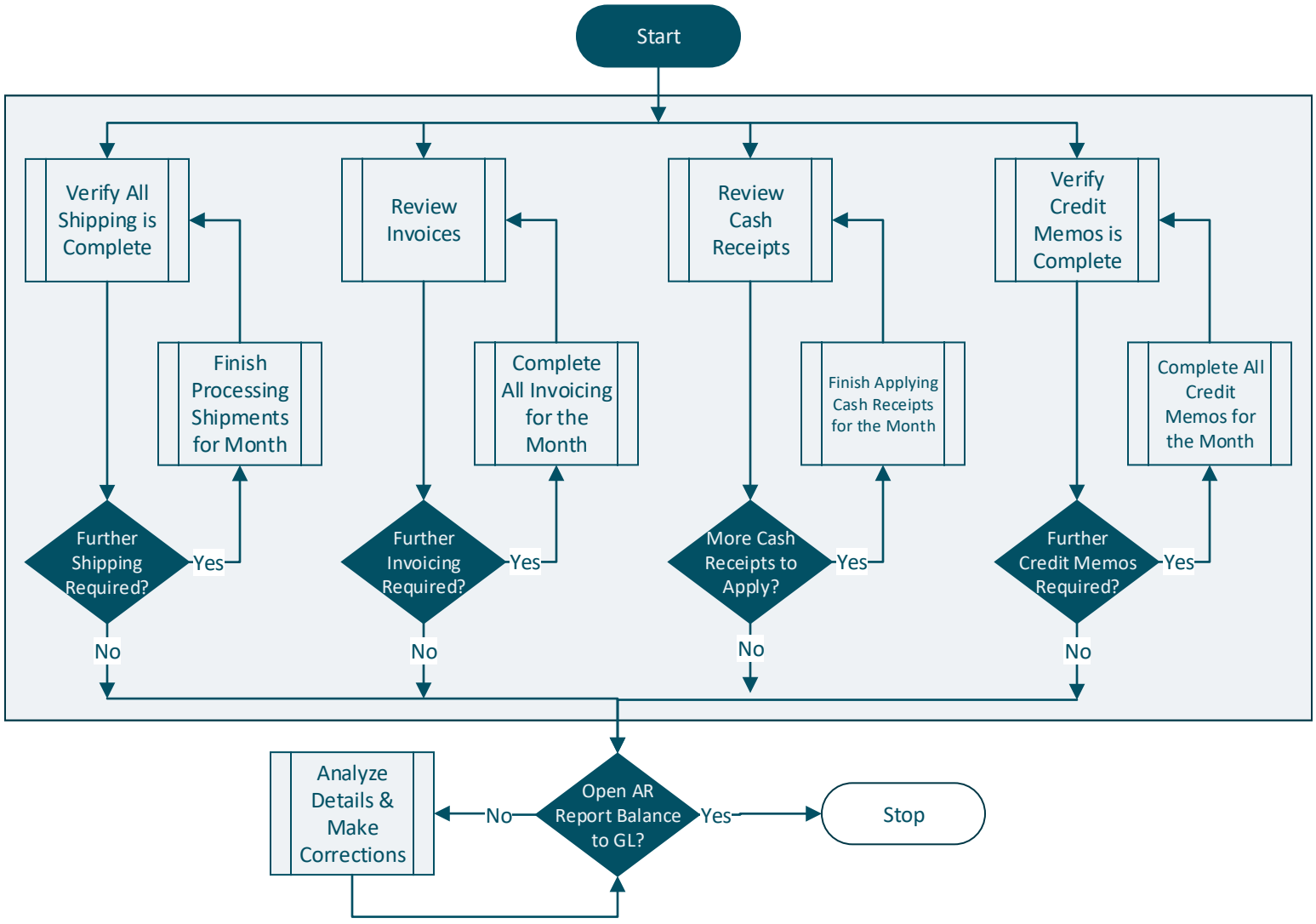
PROCESS: End of Period Processing



Role Assignment:
- Accounting Manager

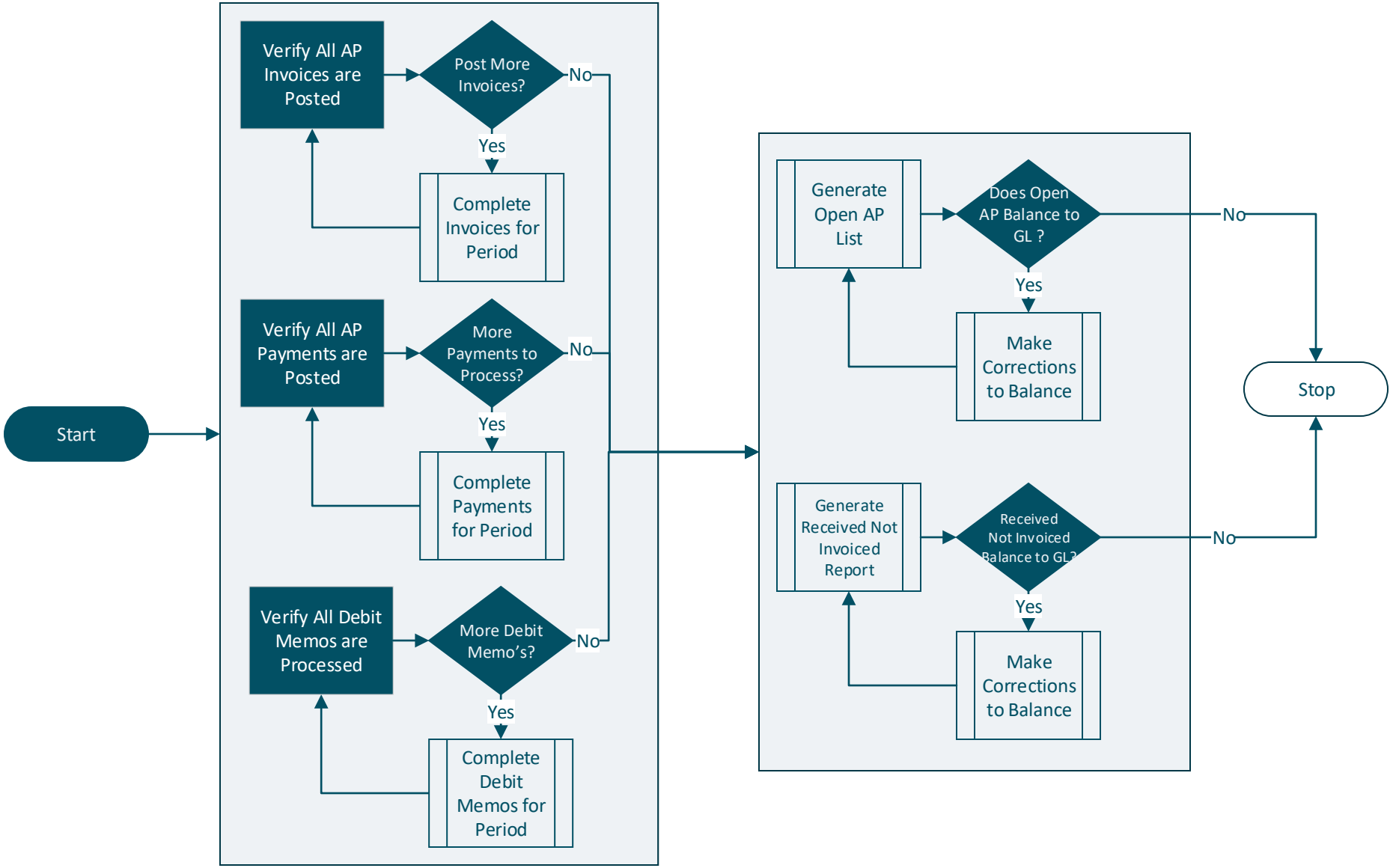
License Requirements:

PROCESS: Verify All Activity - AR



Role Assignment:
- Accounting Manager

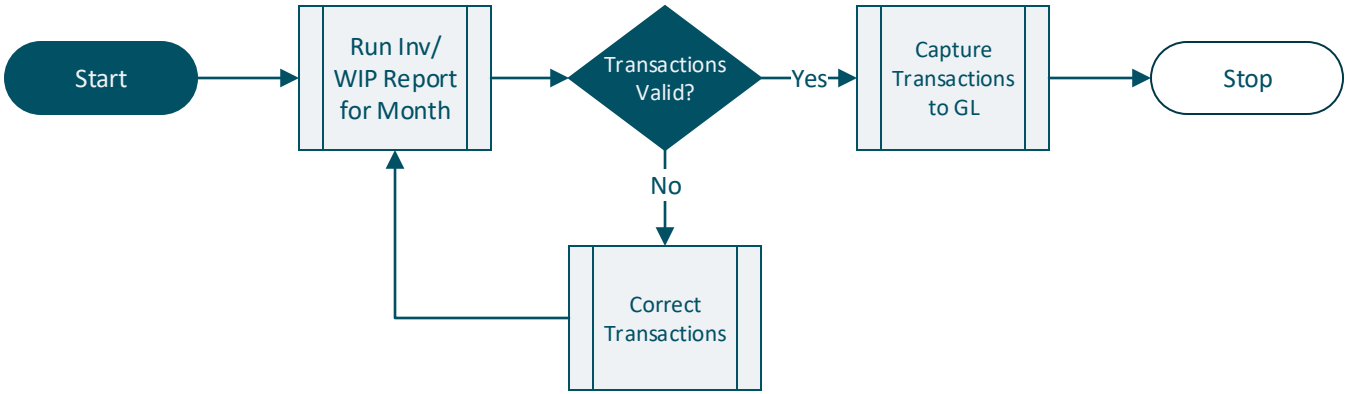
STAGE: Verify All Activity - AP



Role Assignment:
- Accounting Manager

License Requirements:

STAGE: Process Inv, WIP, COS Transactions



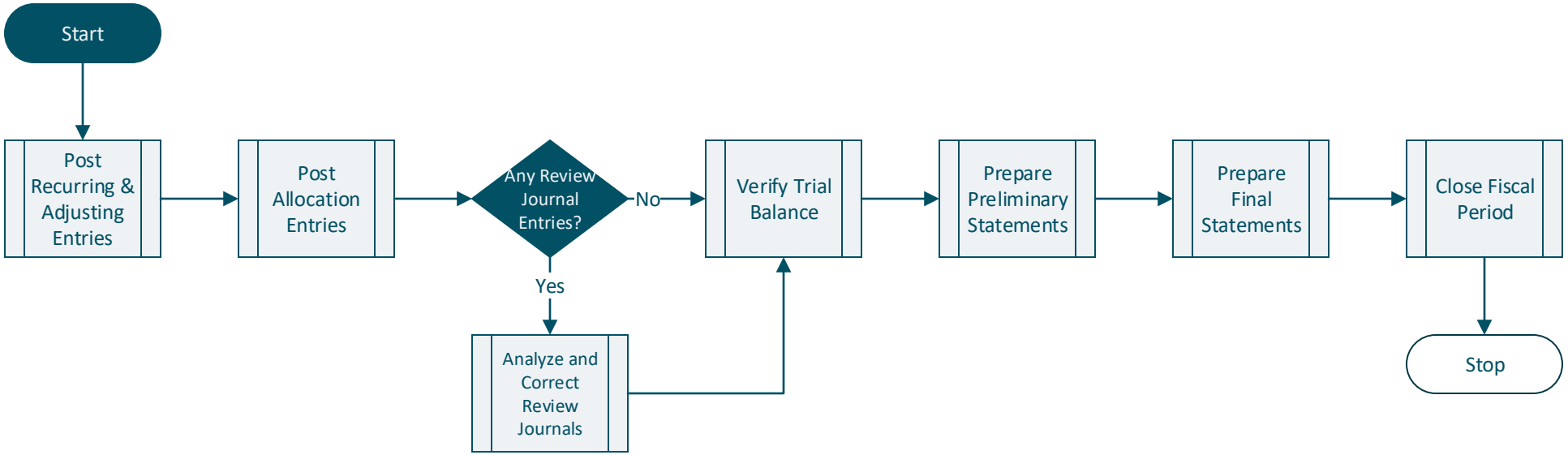
Role Assignment:
- Accounting Manager

License Requirements:

STAGE: Verify Cash Management Activity

Role Assignment:
- Accounting Manager

License Requirements:

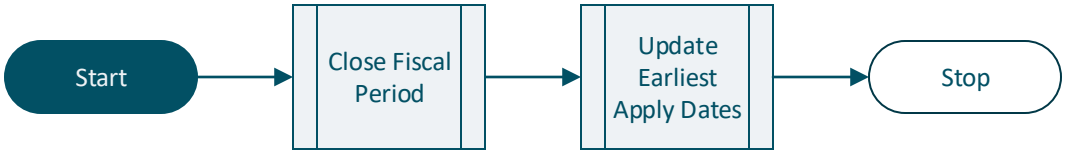


Role Assignment:
- Accounting Manager

License Requirements:

Role Assignment:
- Accounting Manager

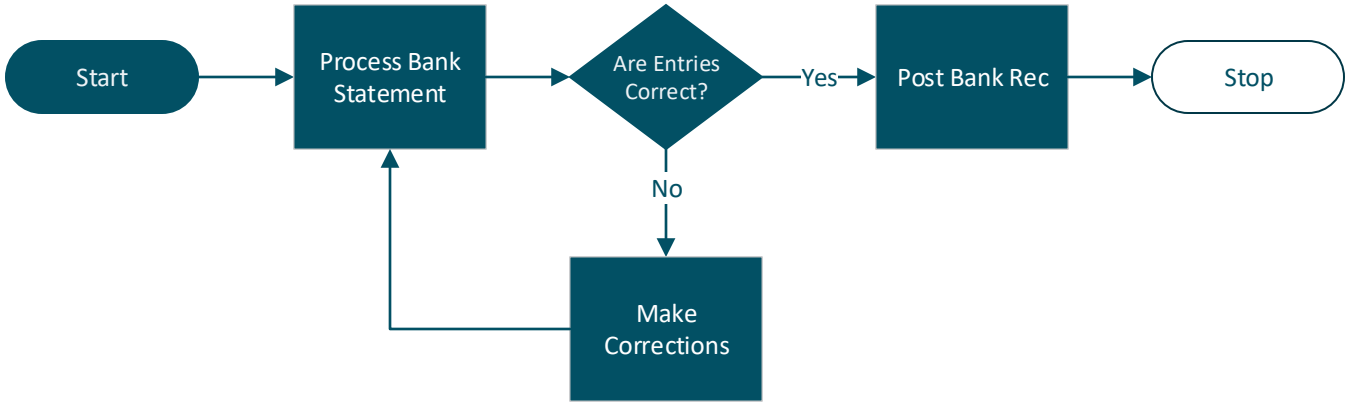
License Requirements:



Role Assignment:
- Accounting Manager

License Requirements:

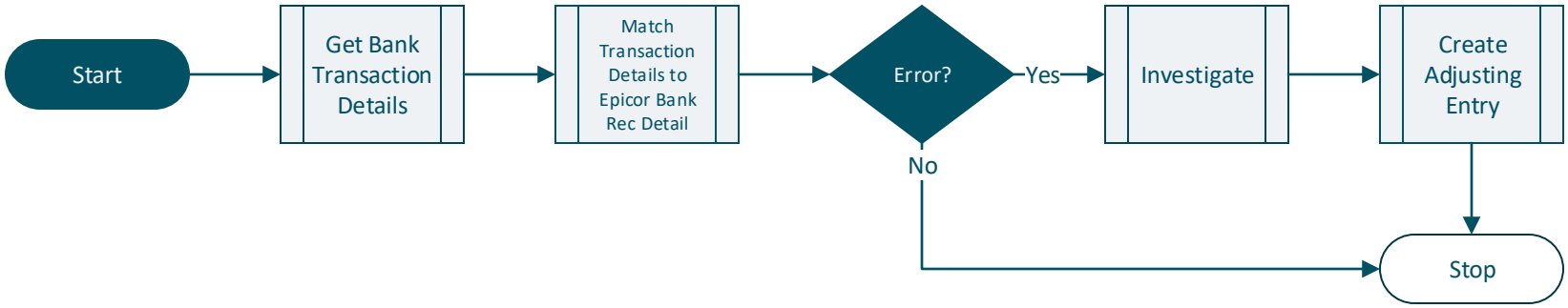
PROCESS: Bank Reconciliation



Role Assignment:
- Accounting Manager

License Requirements:

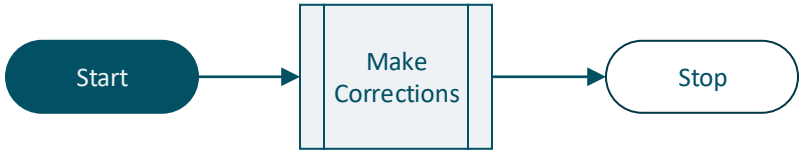
STAGE: Process Bank Statement



Role Assignment:
- Accounting Manager

License Requirements:

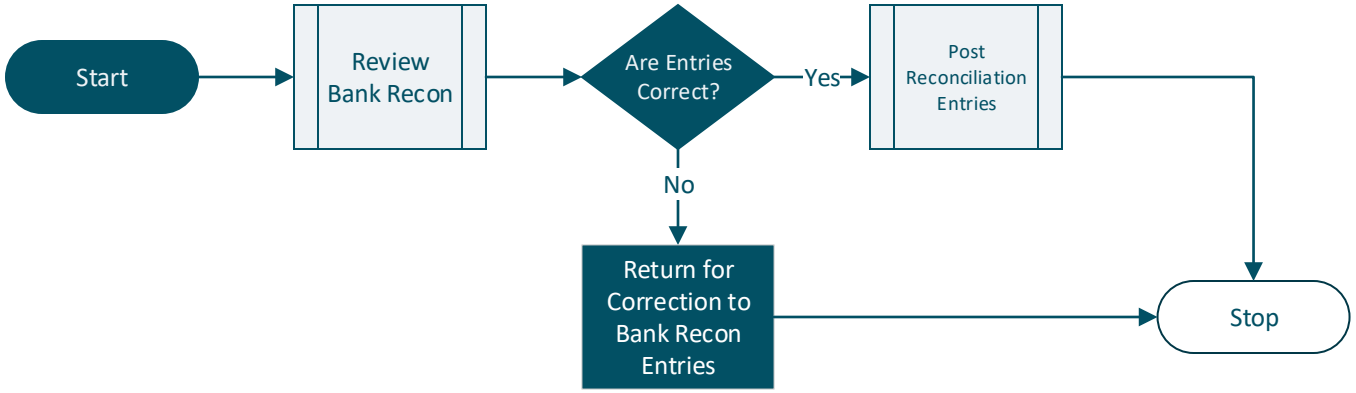
STAGE: Make Corrections



Role Assignment:
- Accounting Manager

License Requirements:

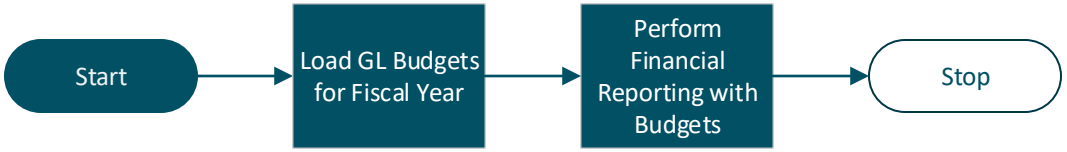
STAGE: Post Bank Rec



Role Assignment:
- Accounting Manager

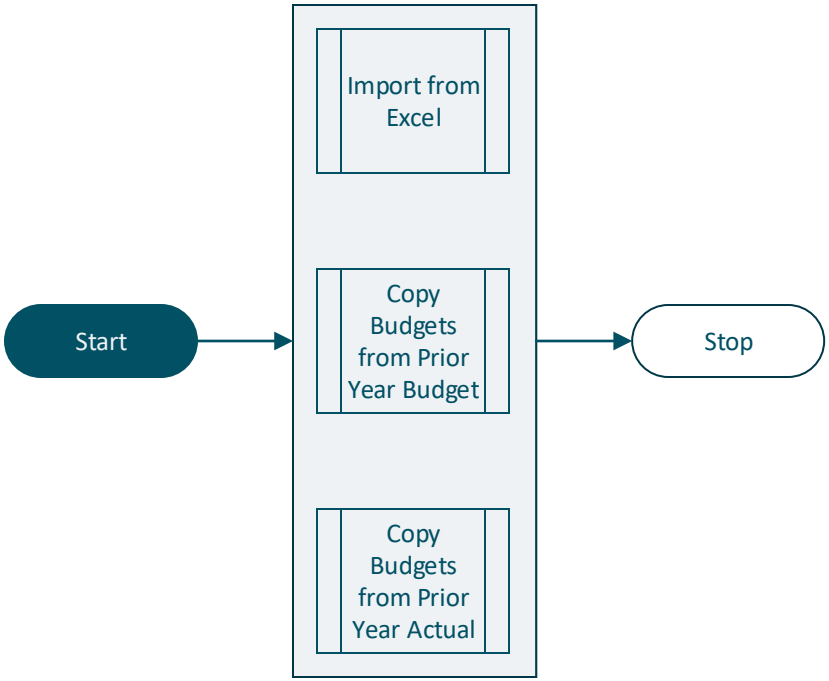
License Requirements:

PROCESS: Budgeting



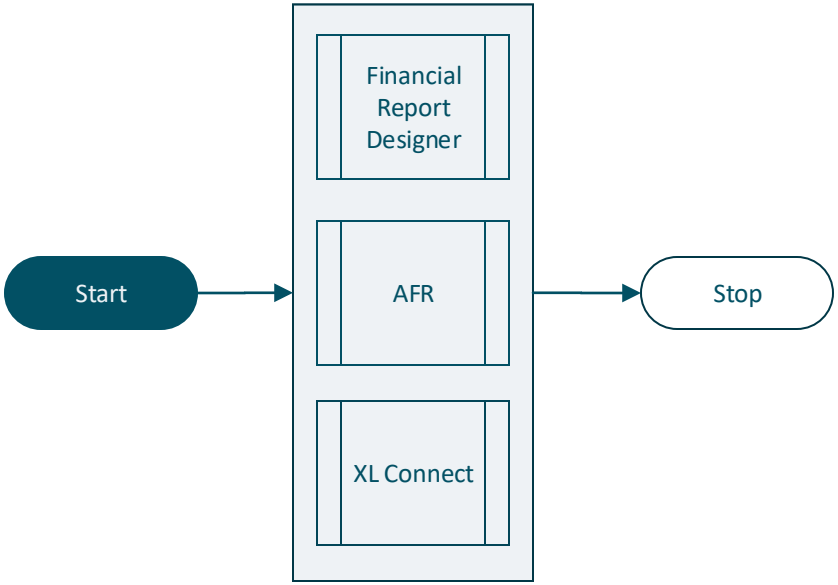
Role Assignment:
- Accounting Manager

License Requirements:



Role Assignment:
- Accounting Manager

License Requirements:

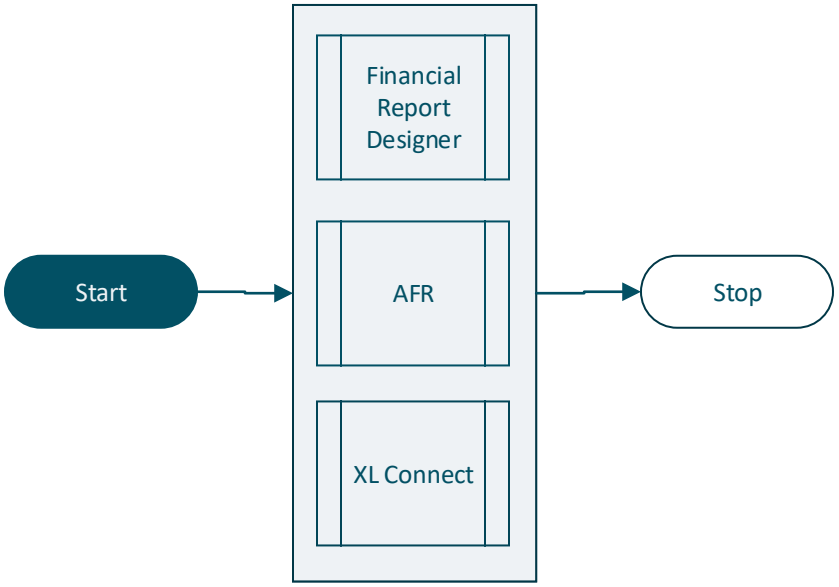


Role Assignment:
- Accounting Manager

License Requirements:

Role Assignment:
- Accounting Manager

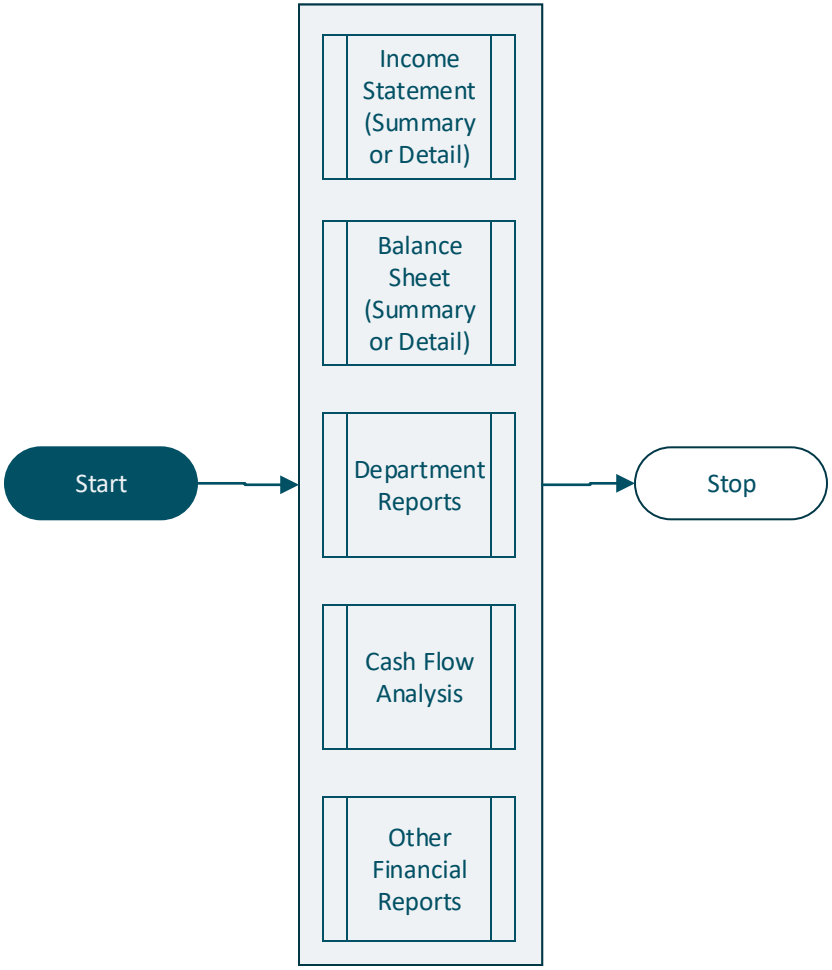
License Requirements:



Role Assignment:
- Accounting Manager

License Requirements:

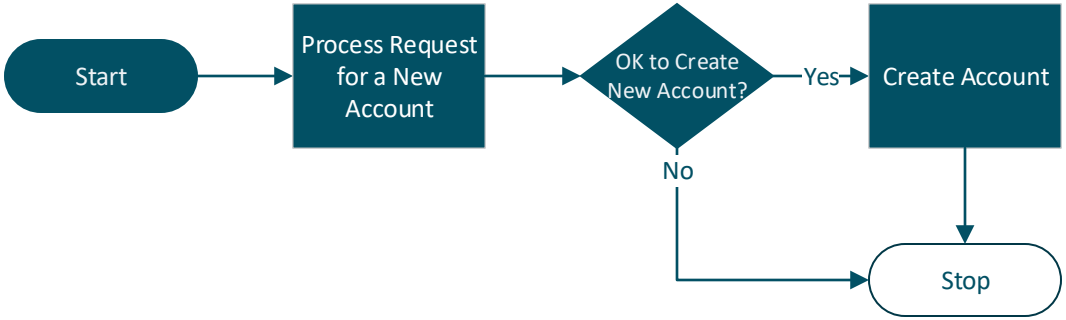
STAGE: Choose Financial Reporting Tool



Role Assignment:
- Accounting Manager

License Requirements:

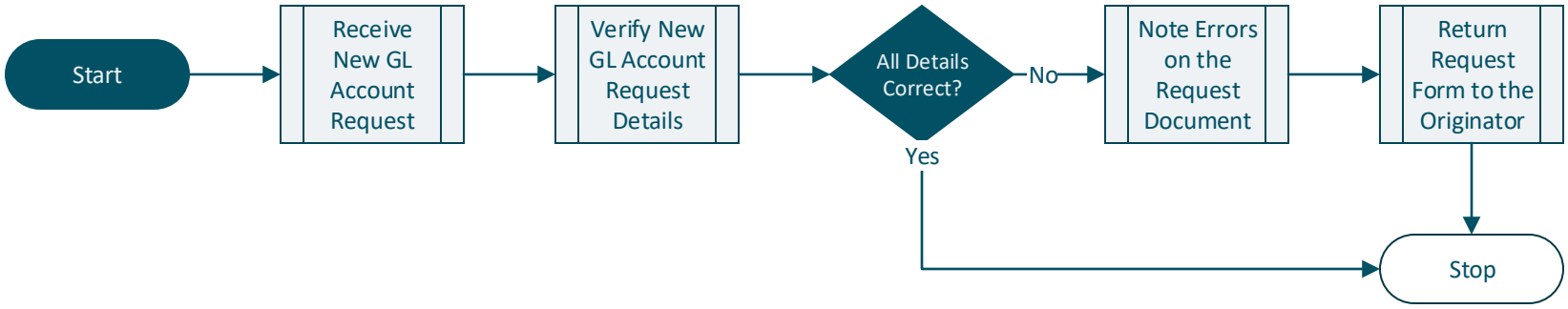
PROCESS: Create New GL Account



Role Assignment:
- Accounting Manager

License Requirements:

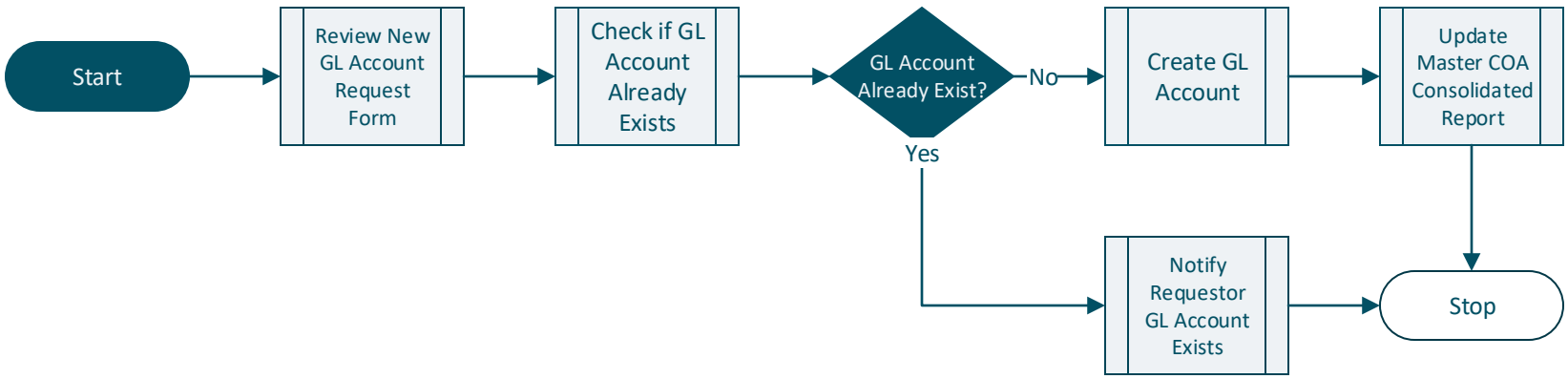
STAGE: Process Request for a New Account



Role Assignment:
- Accounting Manager

License Requirements:

STAGE: Create Account



Role Assignment:
- Accounting Manager

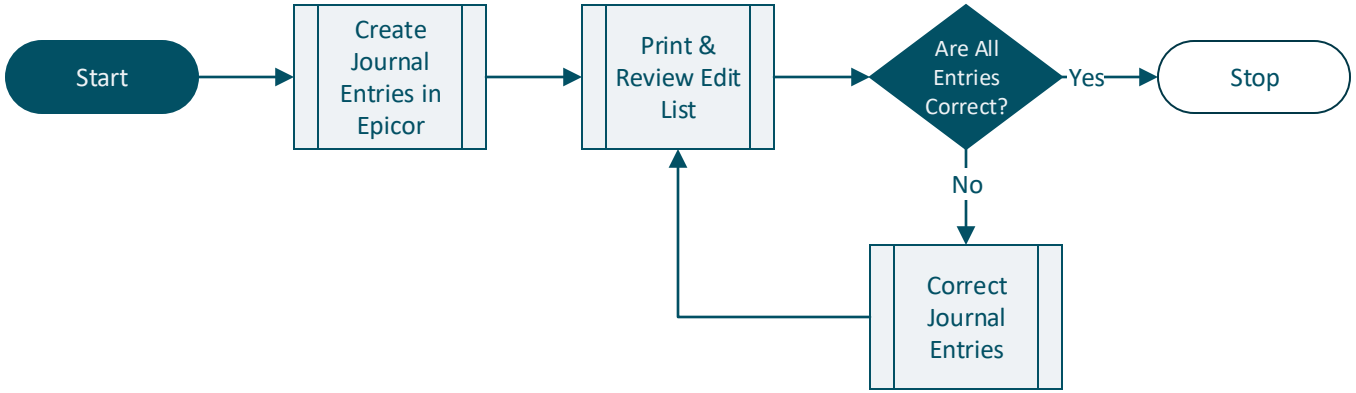
License Requirements:

Role Assignment:
- Accounting Manager

License Requirements:

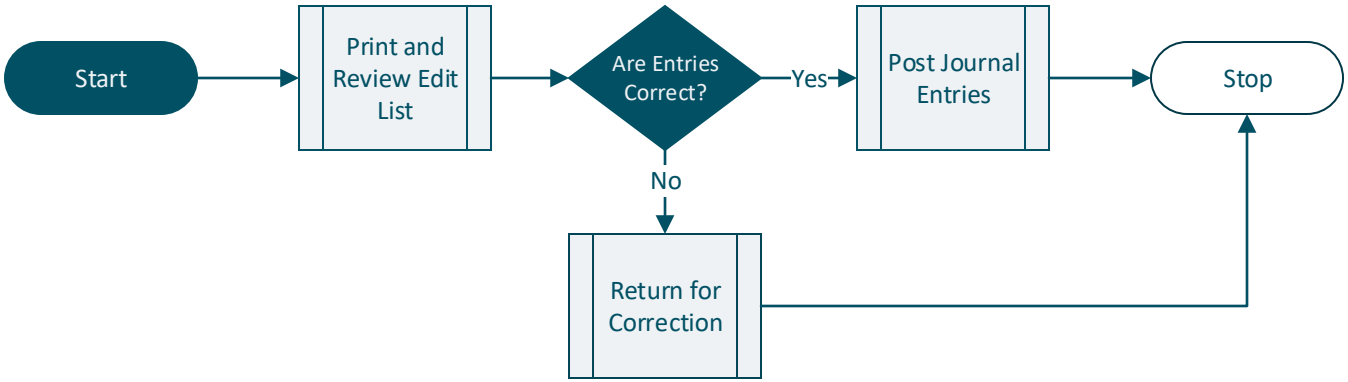
Role Assignment:
- Accounting Manager

License Requirements:



Role Assignment:
- Accounting Manager

License Requirements:



Role Assignment:
- Accounting Manager

License Requirements:

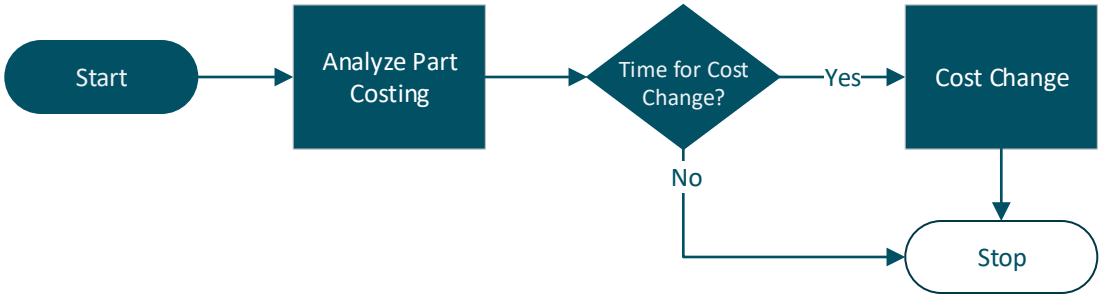
Cost Accounting

FUNCTION MENU

GENERAL LEDGER MENU

Part Cost Maintenance

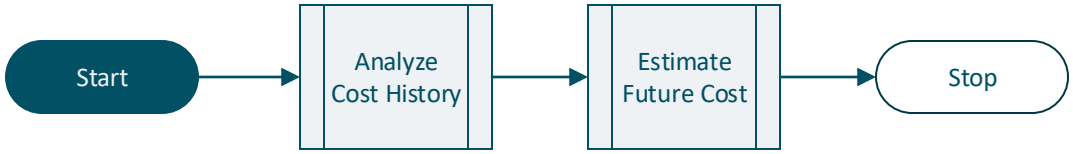
Costing Periodic Processes



Role Assignment:
- Cost Accountant

License Requirements:

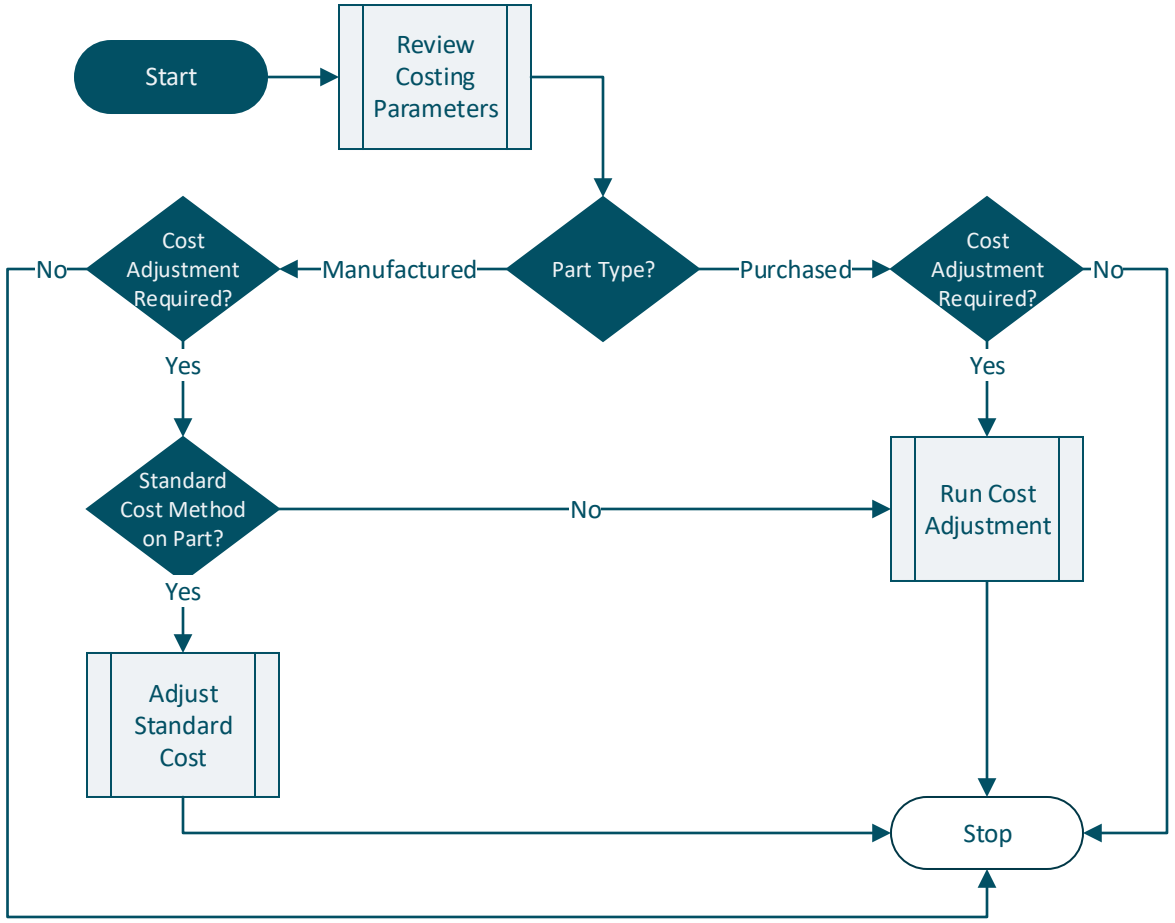
STAGE: Analyze Part Costing



Role Assignment:
- Cost Accountant

License Requirements:

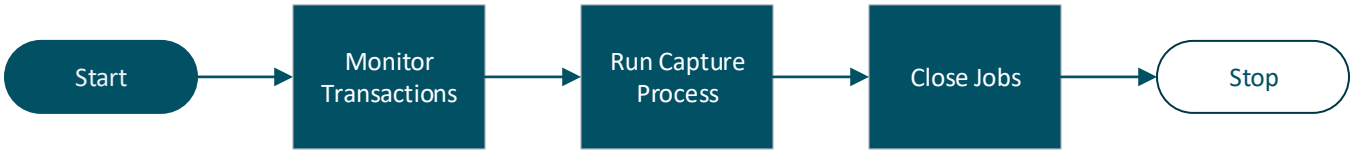
STAGE: Cost Change



Role Assignment:
- Cost Accountant

License Requirements:

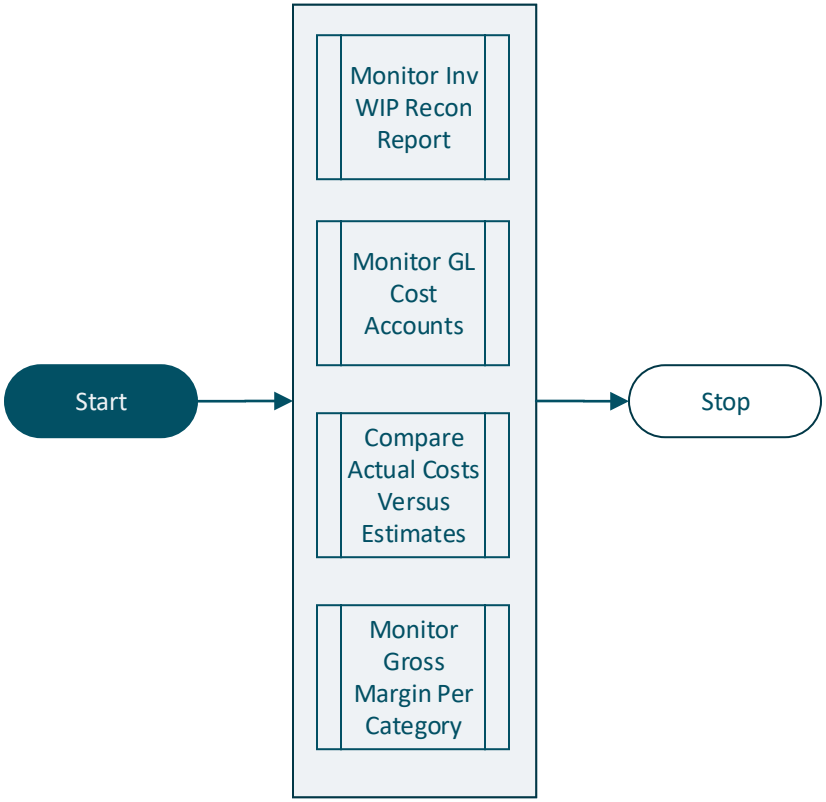
PROCESS: Costing Periodic Processes



Role Assignment:
- Cost Accountant

License Requirements:

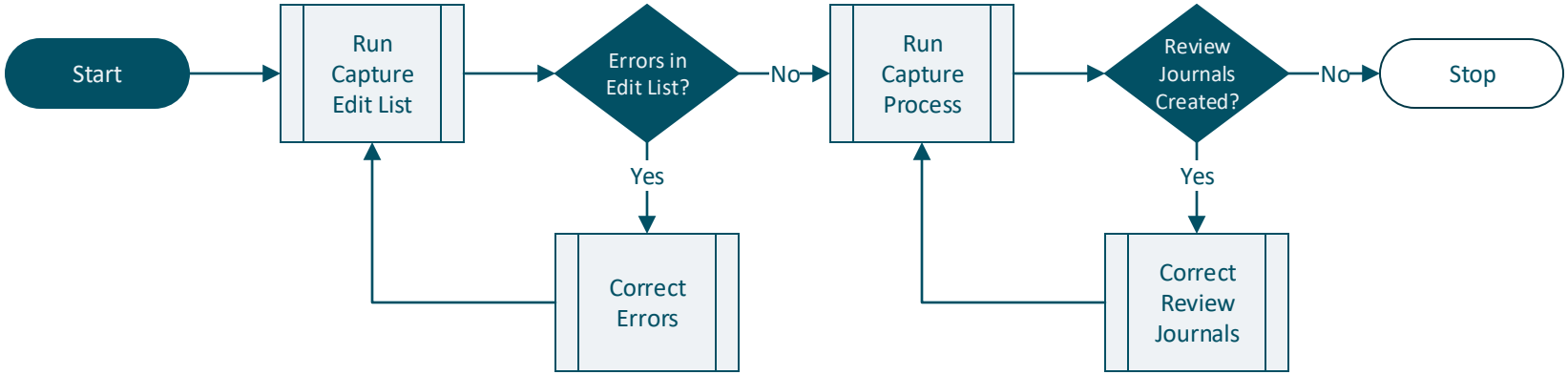
STAGE: Monitor Transactions



Role Assignment:
- Cost Accountant

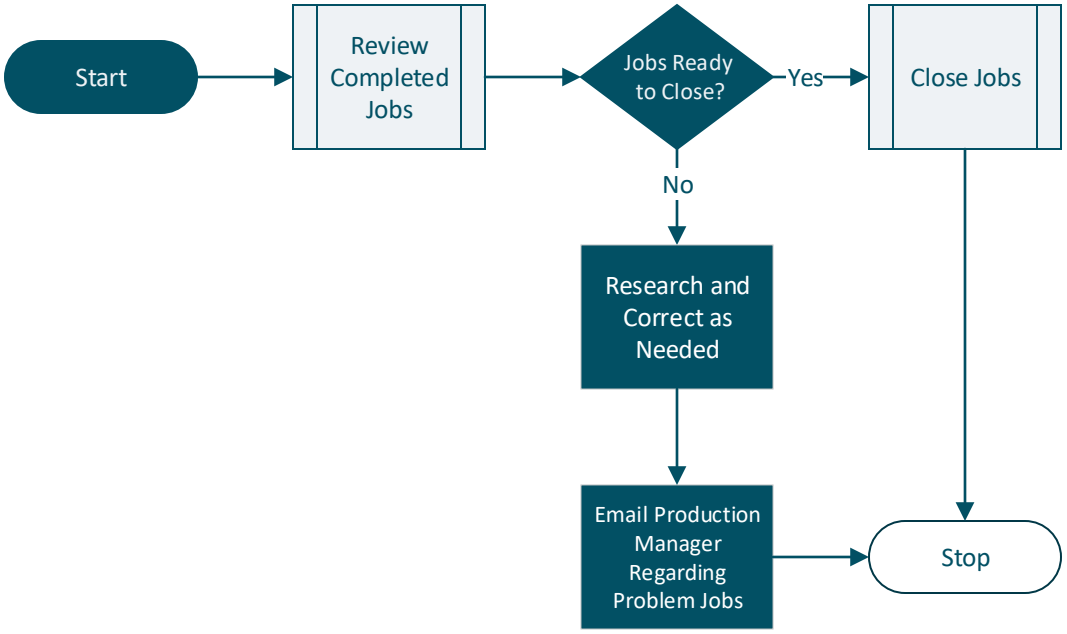
License Requirements:

STAGE: Run Capture Process



Role Assignment:
- Cost Accounting

License Requirements:



Role Assignment:
- Cost Accountant

License Requirements:

Multi-Company

FUNCTION MENU

COST ACCOUNT MENU

Consolidate to Parent

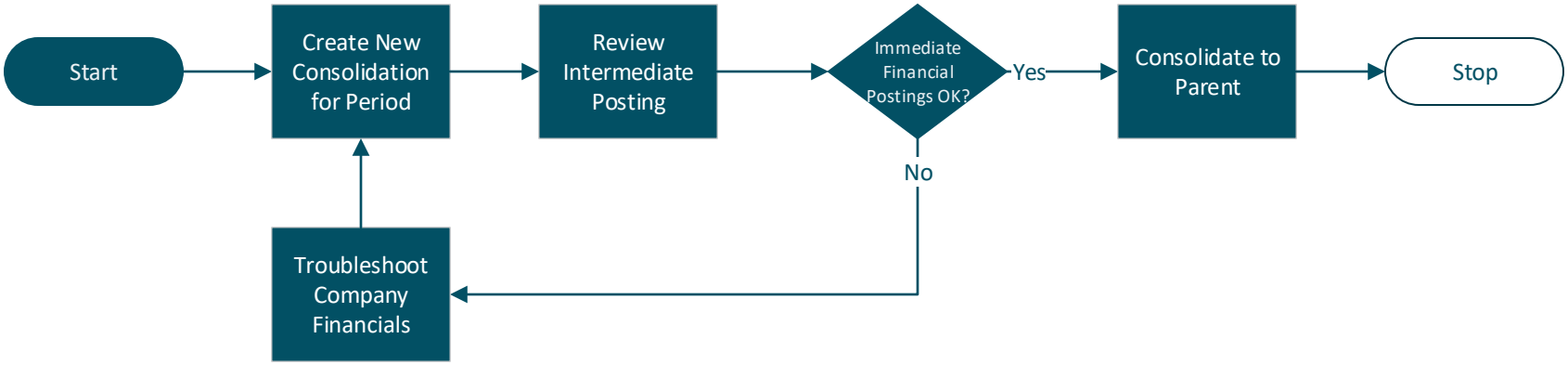
Inter Company Trading

Multi Company AP and GL

Global Rate Types / Currency Codes

Centralized AP Payments

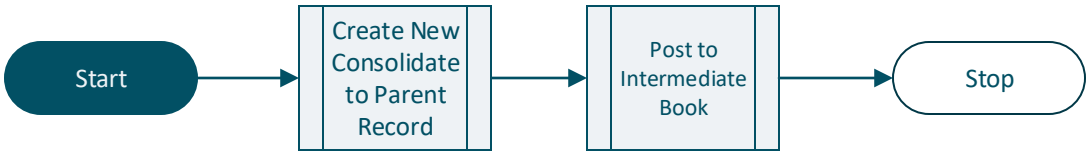
PROCESS: Consolidate to Parent



Role Assignment:
- Accounting Manager

License Requirements:

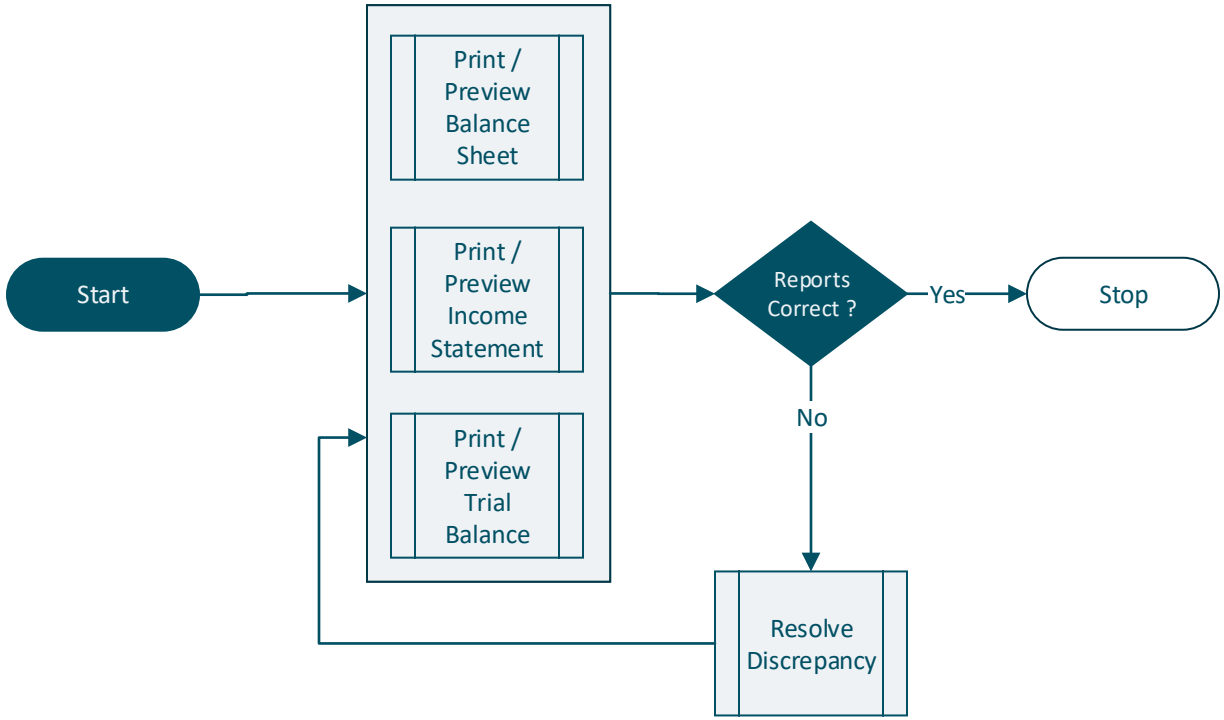
STAGE: Create New Consolidation for the Period



Role Assignment:
- Accounting Manager

License Requirements:

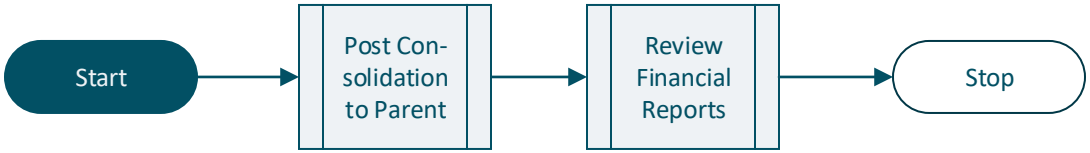
STAGE: Review Intermediate Posting



Role Assignment:
- Accounting Manager

License Requirements:

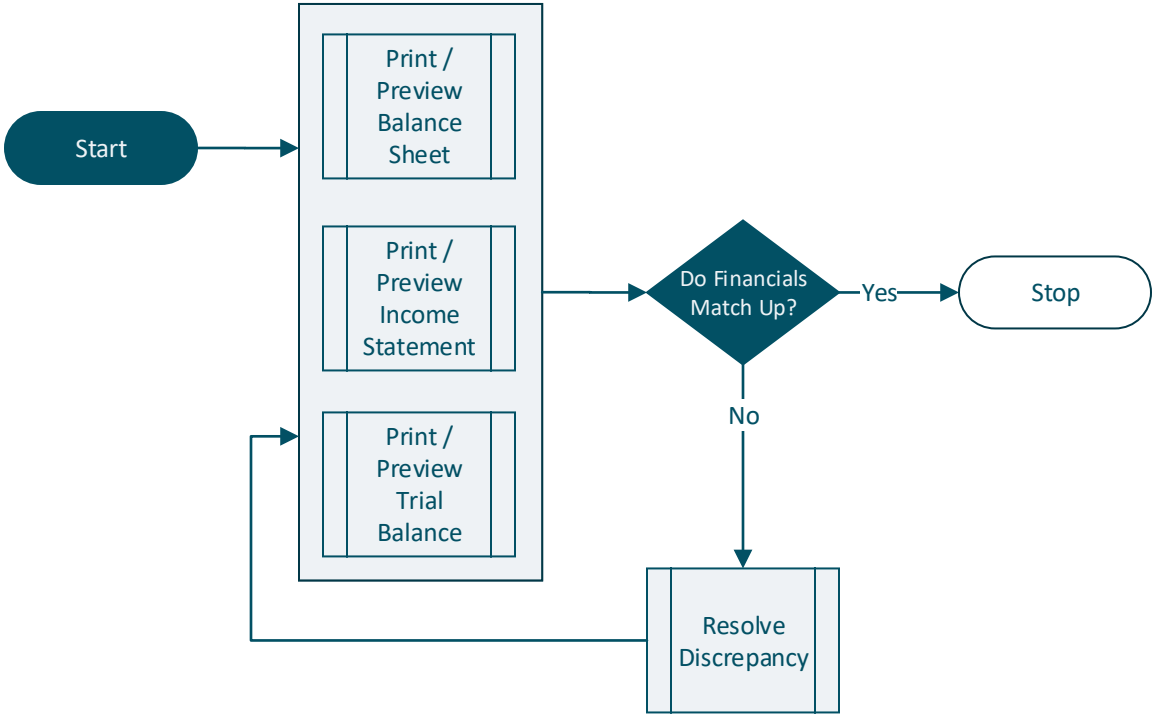
STAGE: Consolidate to Parent



Role Assignment:
- Accounting Manager

License Requirements:

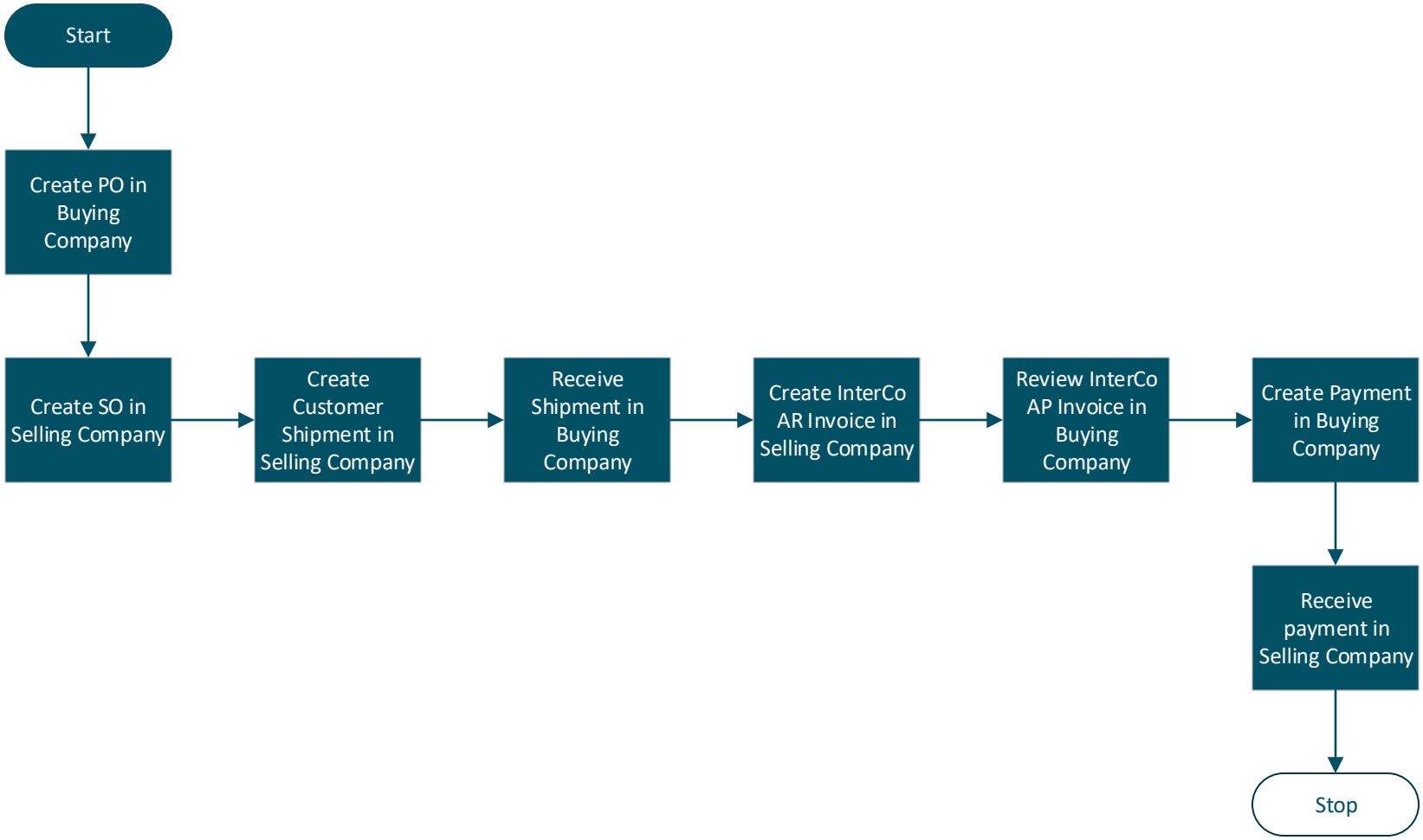
STAGE: Troubleshoot Company Financials



Role Assignment:
- Accounting Manager

License Requirements:

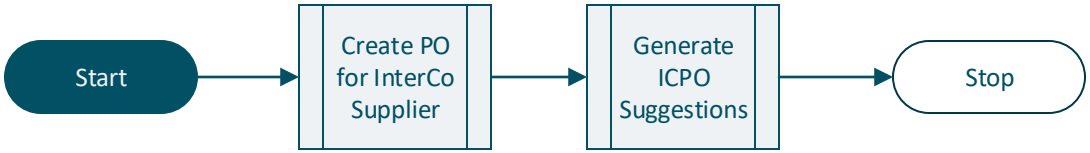
PROCESS: InterCompany Trading



Role Assignment:
- Purchasing, Sales, Shipping & Receiving, AR Entry, AP Entry

License Requirements:

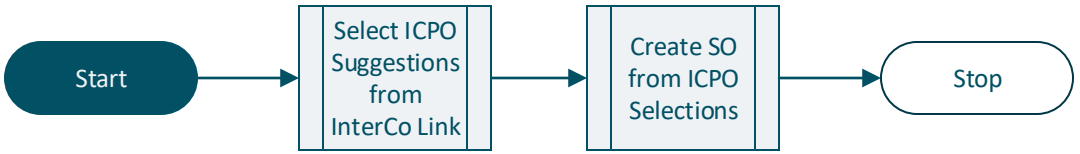
PROCESS: Create PO in Buying Company



Role Assignment:
- Purchasing

License Requirements:

STAGE: Create SO In Selling Company



Role Assignment:
- Sales

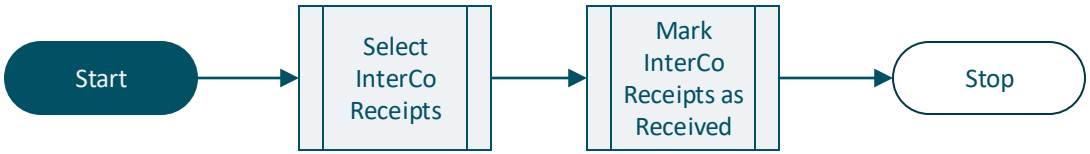
License Requirements:

STAGE: Create Customer Shipment in Selling Company

Role Assignment:
- Shipping and Receiving

License Requirements:

STAGE: Receive Shipment in Buying Company



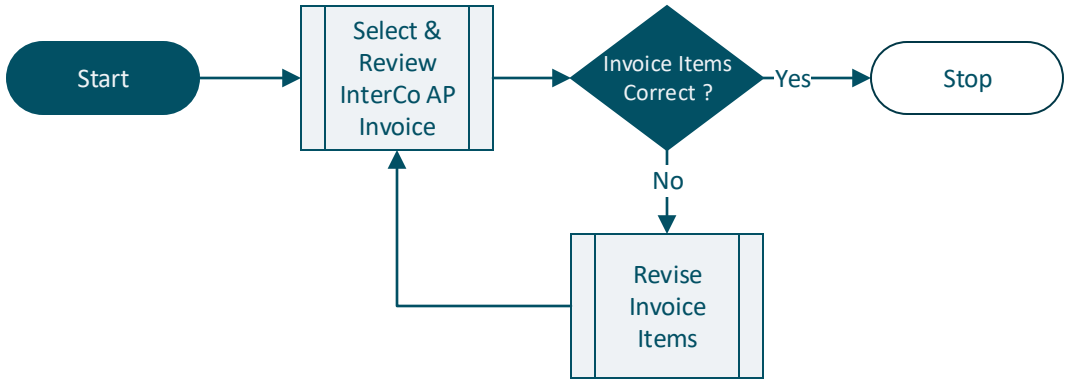
Role Assignment:
- Shipping and Receiving

License Requirements:

STAGE: Create InterCompany AR Invoice in Selling Company

Role Assignment:
- AR Entry

License Requirements:



Role Assignment:
- AP Entry

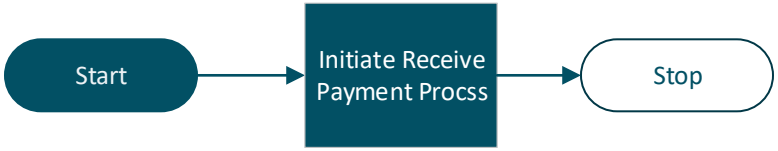
License Requirements:

STAGE: Create Payment in Buying Company

Role Assignment:
- AP Entry

License Requirements:

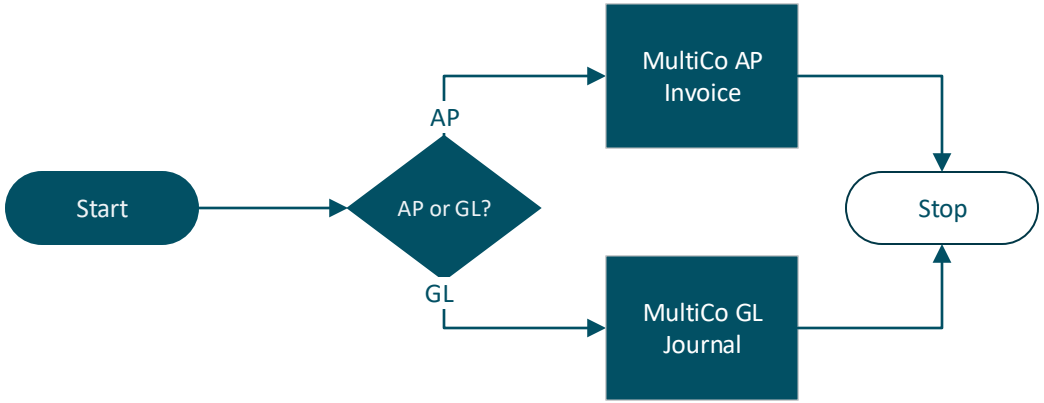
STAGE: Receive Payment in Selling Company



Role Assignment:
- AR Entry

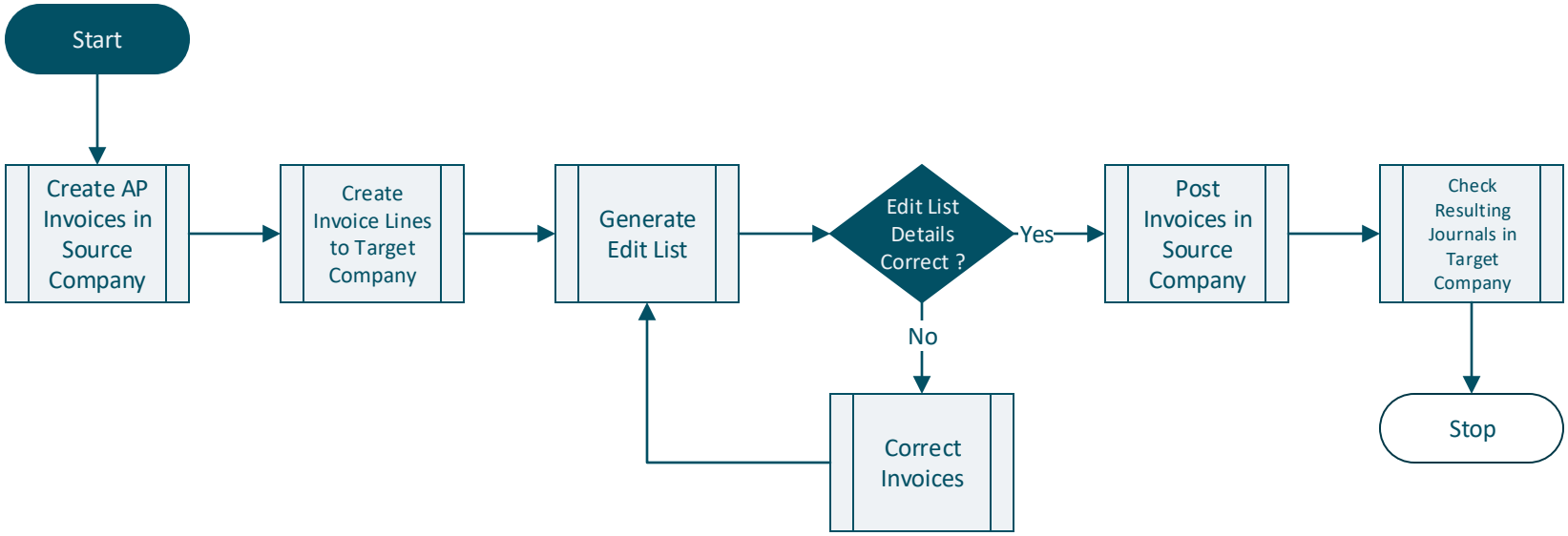
License Requirements:

PROCESS: Multi-Company AP & GL



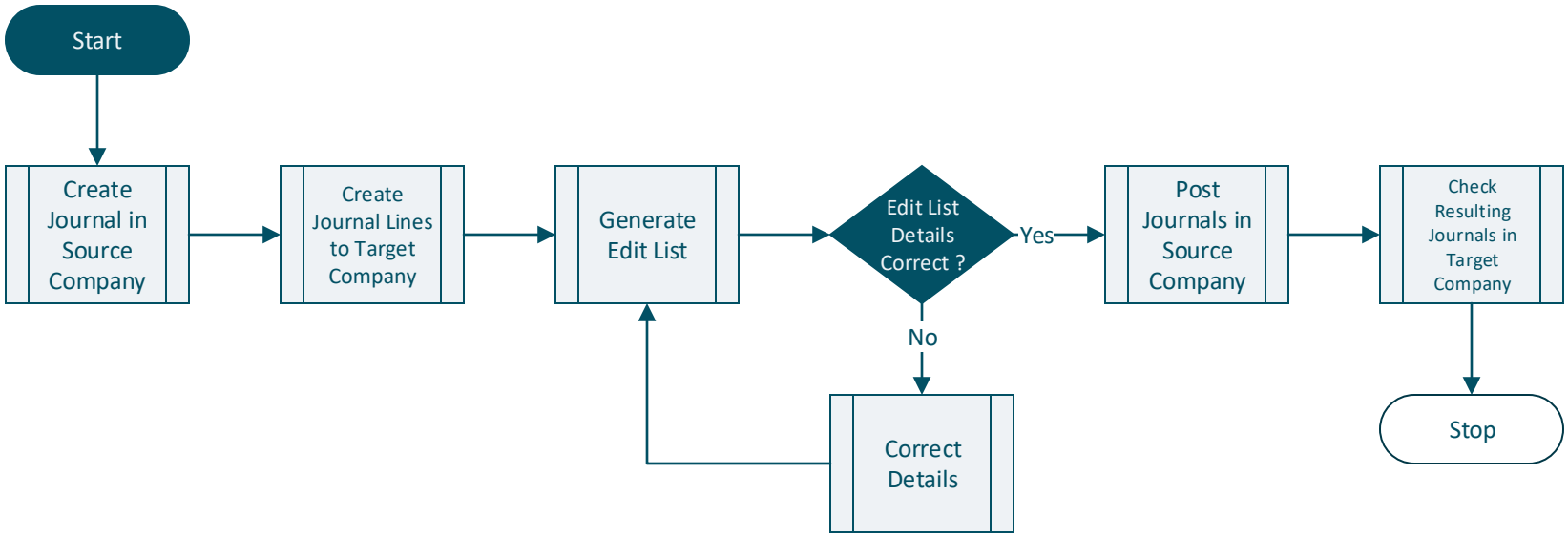
Role Assignment:
- AP Entry, Accounting Manager

License Requirements:



Role Assignment:
- AP Entry

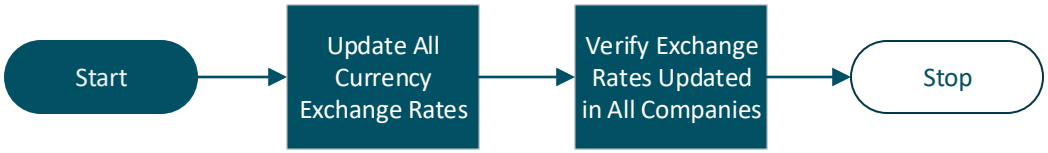
License Requirements:



Role Assignment:
- Accounting Manager

License Requirements:

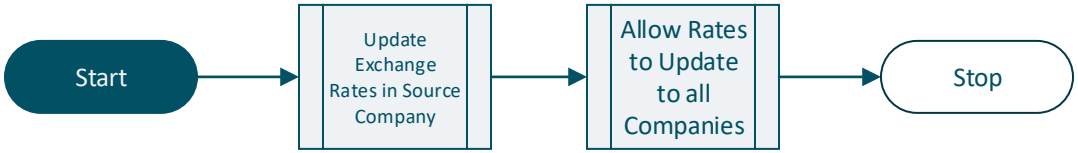
PROCESS: Global Rate Types and Currency Codes



Role Assignment:
- Accounting Manager

License Requirements:

STAGE: Update All Currency Exchange Rates



Role Assignment:
- Accounting Manager

License Requirements:

STAGE: Verify Exchange Rates Updated in All Companies

Role Assignment:
- Accounting Manager

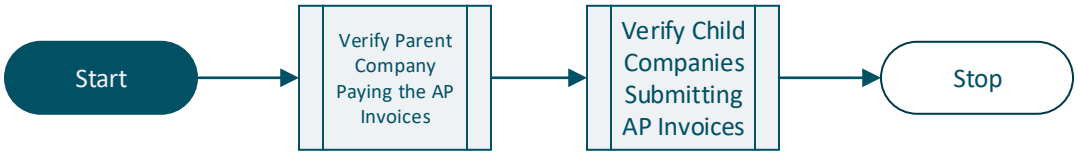
License Requirements:

PROCESS: Centralized AP Payments

Role Assignment:
- Accounting Manager, AP Entry

License Requirements:

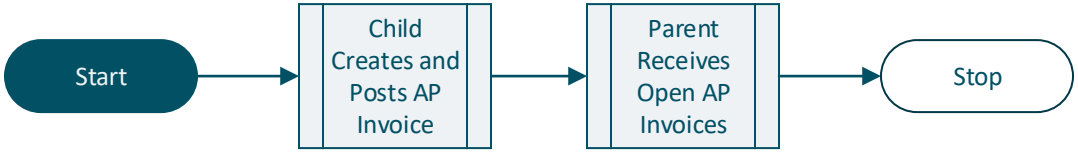
STAGE: Determine AP Payment Links



Role Assignment:
- Accounting Manager

License Requirements:

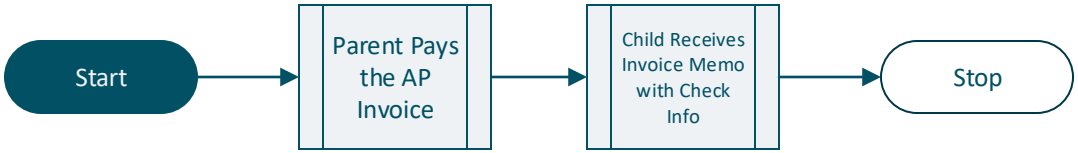
STAGE: Child Company Creates AP Invoice



Role Assignment:
- AP Entry

License Requirements:

STAGE: Parent Company Pays the AP Invoice



Role Assignment:
- AP Entry

License Requirements:

Currency

FUNCTION MENU

MULTI COMPANY MENU

Update Exchange Rates

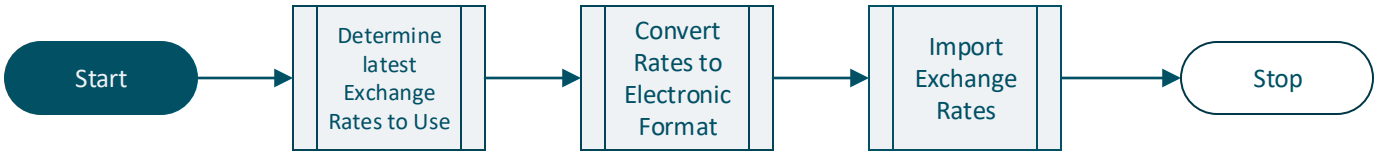
Month-End Currency Processes

PROCESS: Update Exchange Rates

Role Assignment:
- Accounting Manager

License Requirements:

STAGE: Update Exchange Rates



Role Assignment:
- Accounting Manager

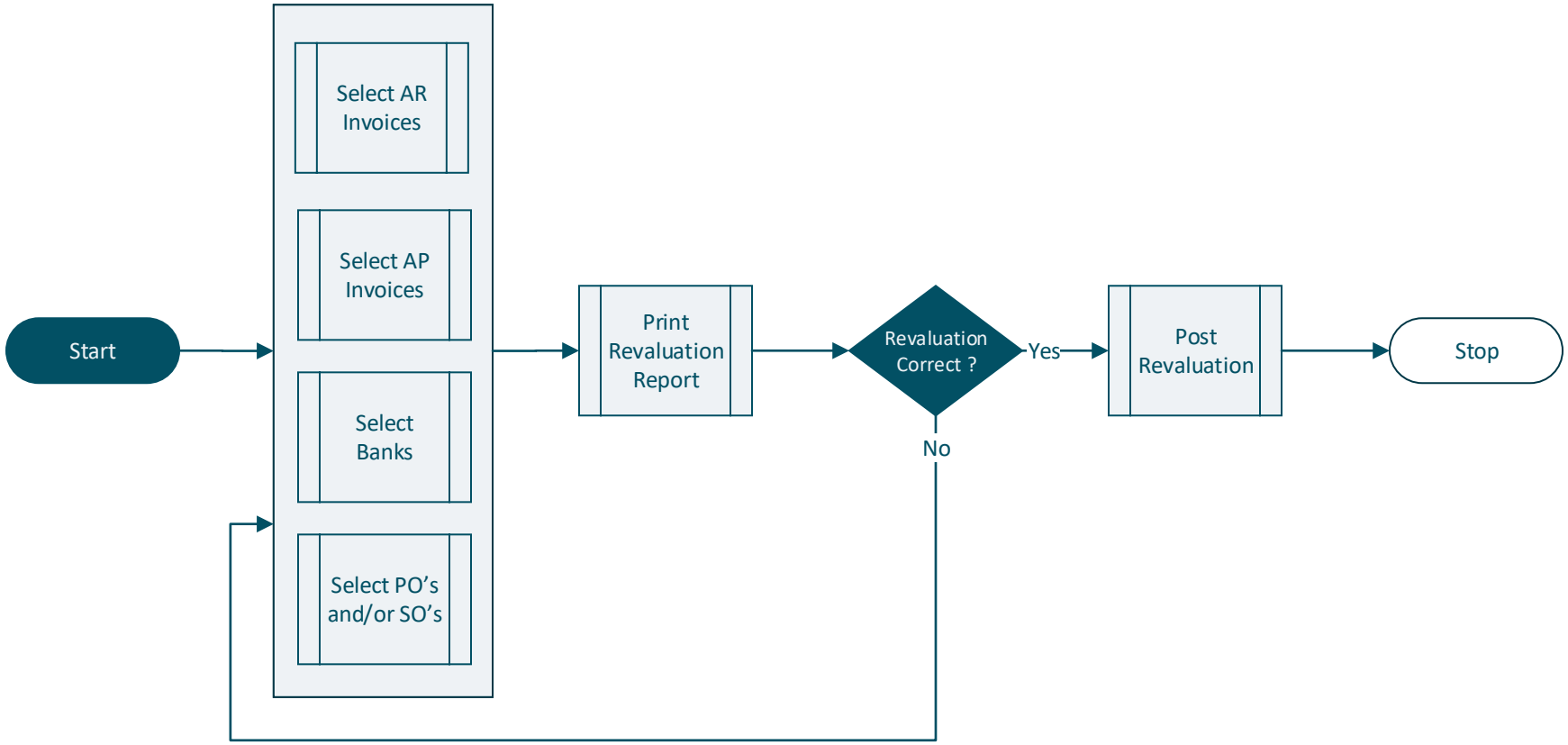
License Requirements:

PROCESS: Month-End Currency Processes

Role Assignment:
- Accounting Manager

License Requirements:

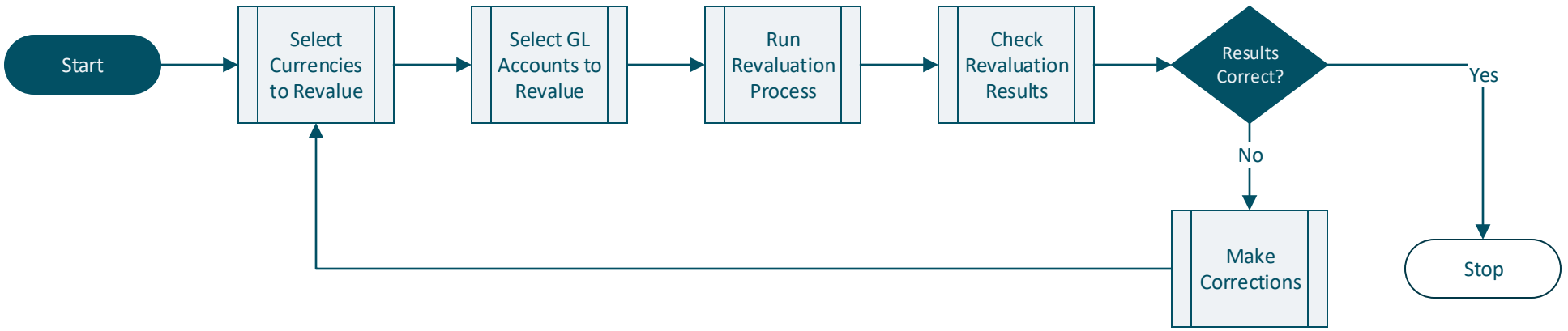
STAGE: Subledger Revaluation



Role Assignment:
- Accounting Manager

License Requirements:

STAGE: GL Account Revaluation



Role Assignment:
- Accounting Manager

License Requirements:

Credit Card Processing

FUNCTION MENU

CURRENCY MENU

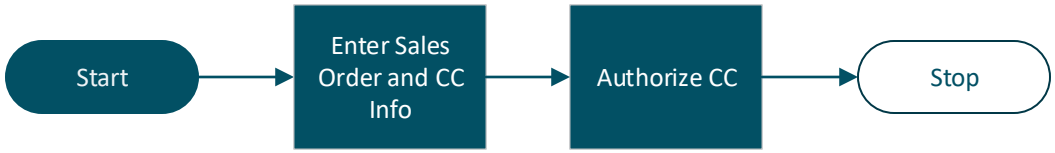
Authorize CC on SO

Ship a CC Sales Order

Process a CC Payment

Process a CC Refund

PROCESS: Authorize CC on SO



Role Assignment:
- Customer Service

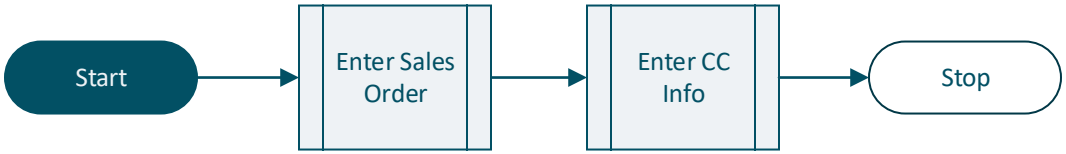
License Requirements:

Credit Card Processing

FUNCTION MENU

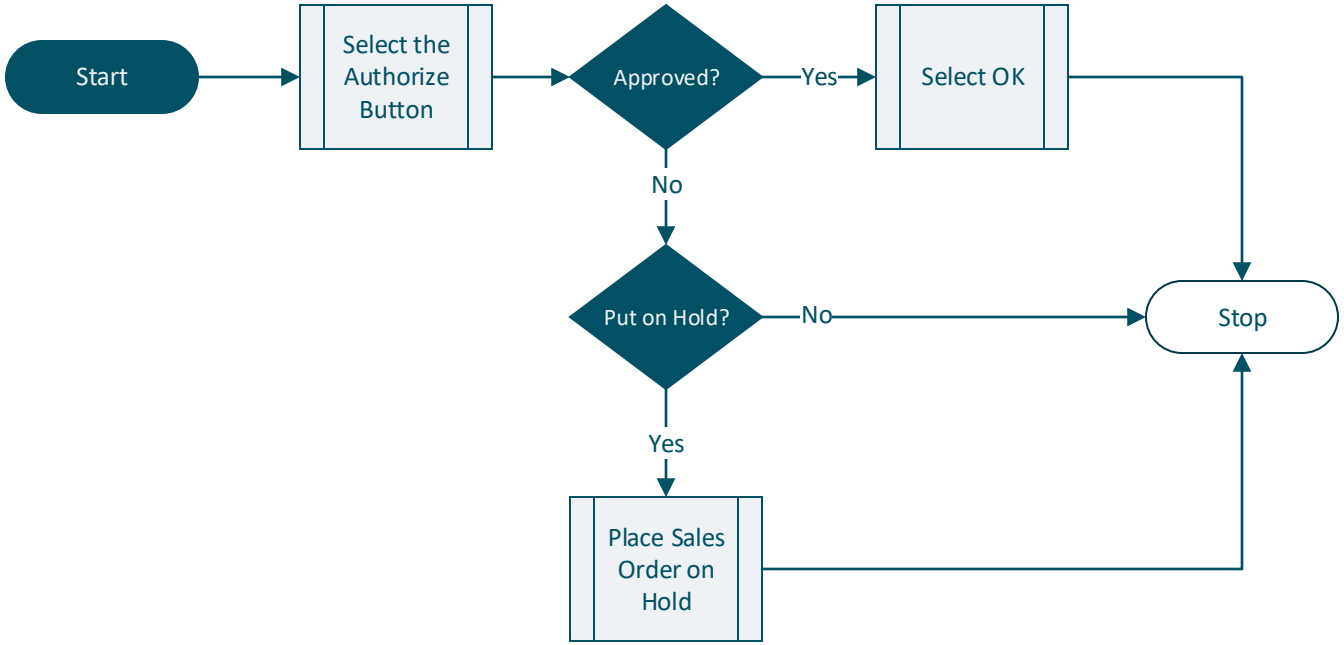
STAGE: Enter Sales Order and CC Info

AUTHORIZE CC ON SO | CREDIT CARD PROCESS MENU



Role Assignment:
- Customer Service

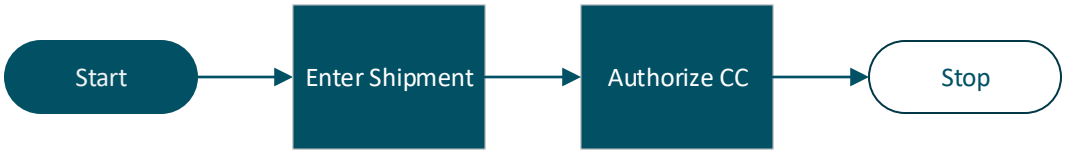
License Requirements:



Role Assignment:
- Customer Service

License Requirements:

PROCESS: Ship a CC Sales Order

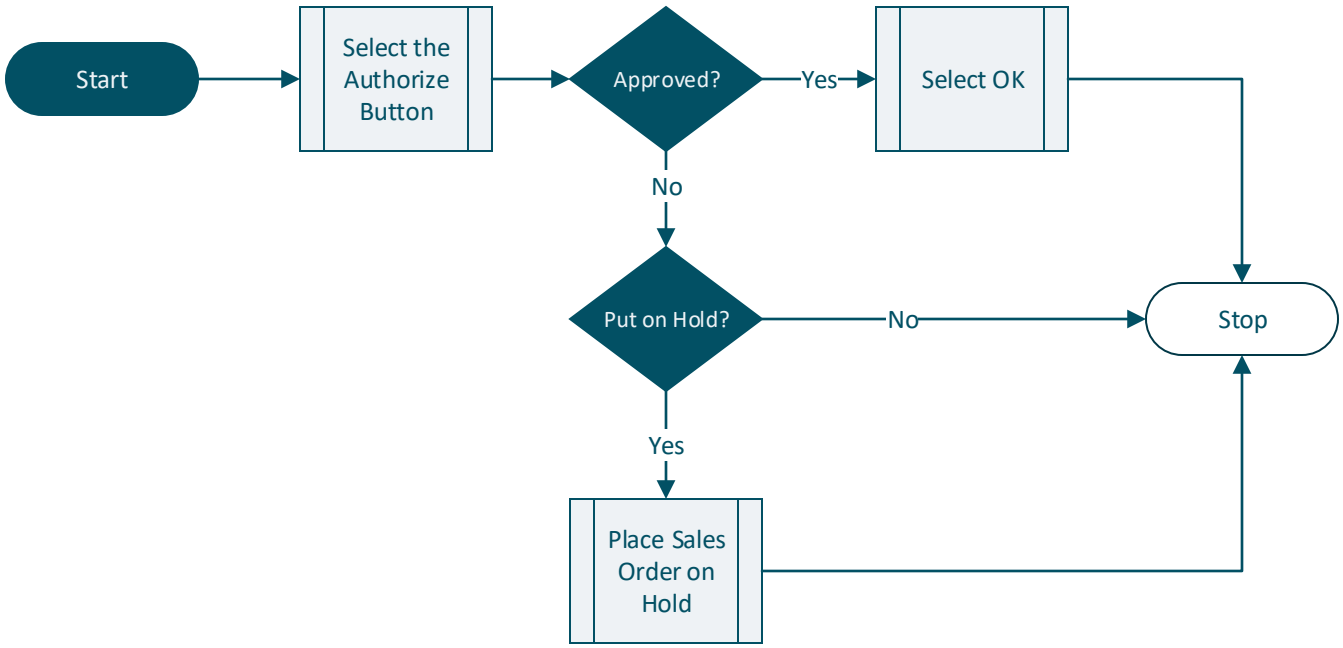


Role Assignment:
- Shipping & Receiving

License Requirements:

Role Assignment:
- Shipping and Receiving

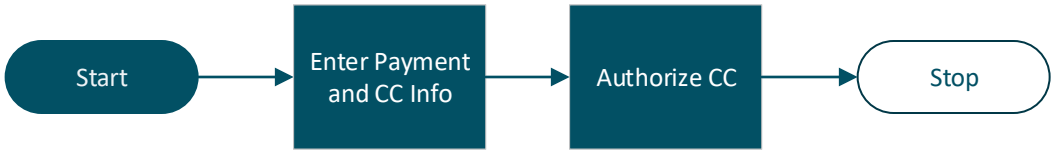
License Requirements:



Role Assignment:
- Shipping and Receiving

License Requirements:

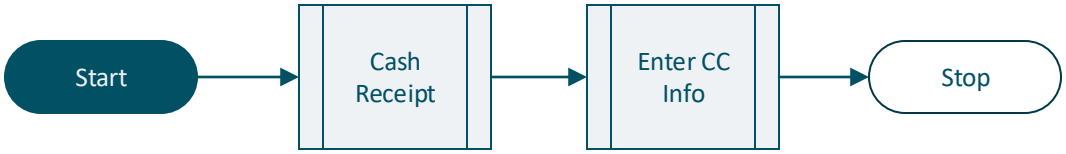
PROCESS: Credit Card Payment



Role Assignment:
- AR Entry

License Requirements:

STAGE: Enter Payment and CC Info



Role Assignment:
- AR Entry

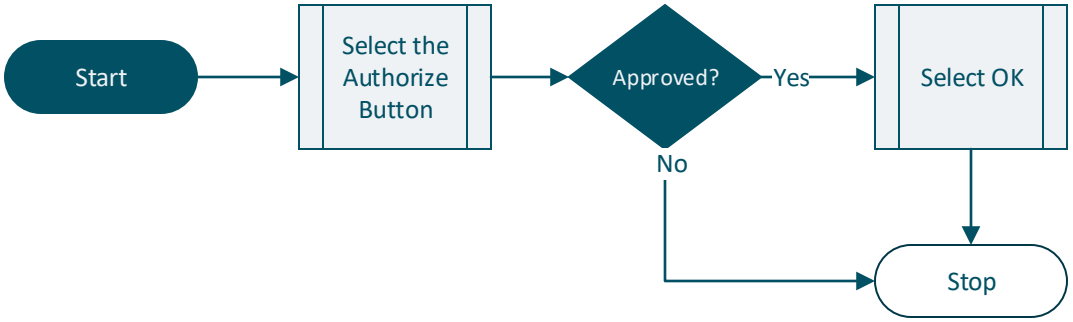
License Requirements:

Credit Card Processing

FUNCTION MENU

STAGE: Authorize CC

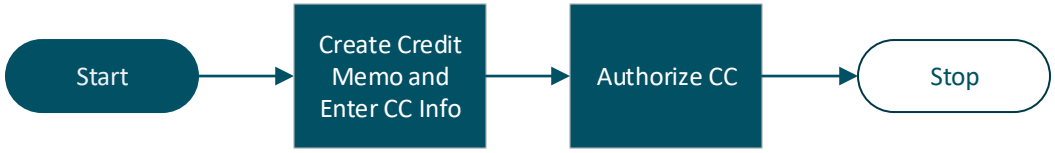
CREDIT CARD PAYMENT | CREDIT CARD PROCESS MENU



Role Assignment:
- AR Entry

License Requirements:

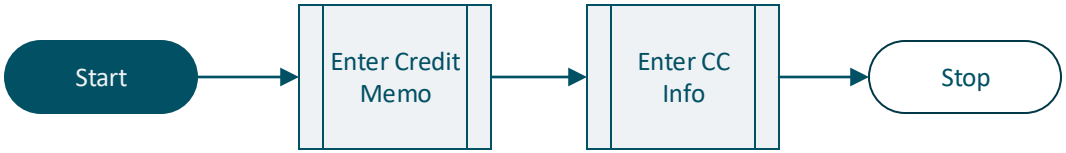
PROCESS: Credit Card Refund



Role Assignment:
- AR Entry

License Requirements:

STAGE: Create Credit Memo and Enter CC Info



Role Assignment:
- AR Entry

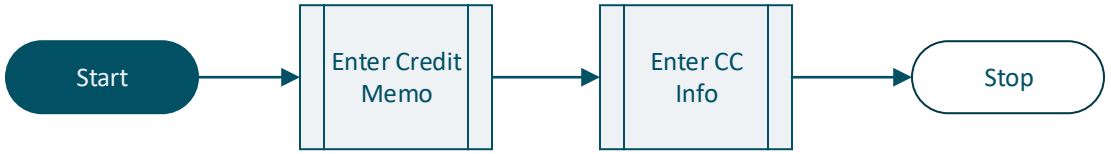
License Requirements:

Credit Card Processing

FUNCTION MENU

STAGE: Authorize CC

CREDIT CARD REFUND | CREDIT CARD PROCESS MENU



Role Assignment:
- AR Entry

License Requirements:

Rebates

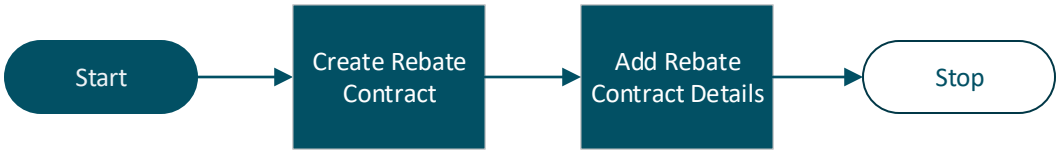
FUNCTION MENU

CREDIT CARD PROCESS MENU

Rebate Contract

Rebate Processing

PROCESS: Rebate Contract



Role Assignment:
- Accounting Manager

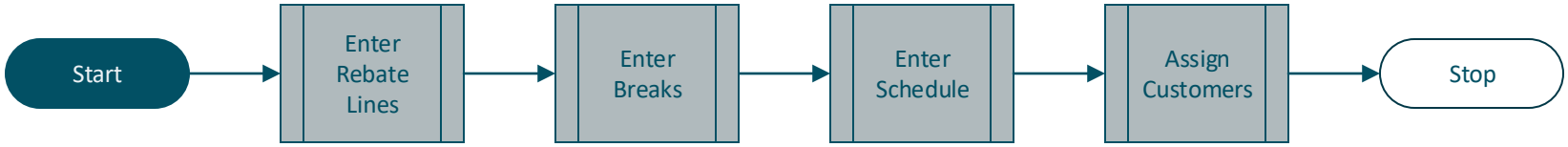
License Requirements:

STAGE: Create Rebate Contract

Role Assignment:
- Accounting Manager

License Requirements:

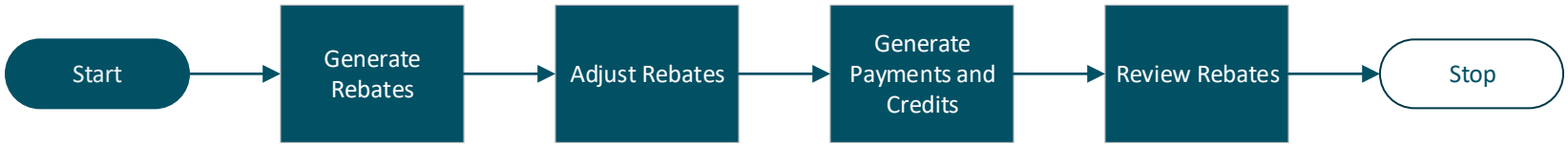
STAGE: Add Rebate Contract Details



Role Assignment:
- Accounting Manager

License Requirements:

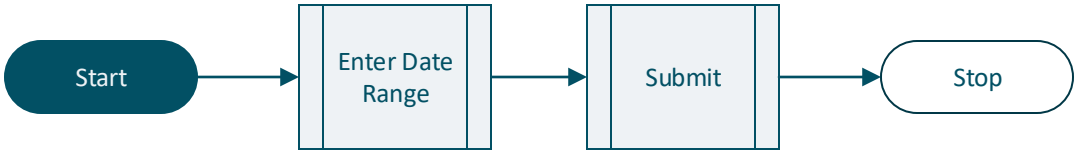
PROCESS: Rebate Processing



Role Assignment:
- Accounting Manager

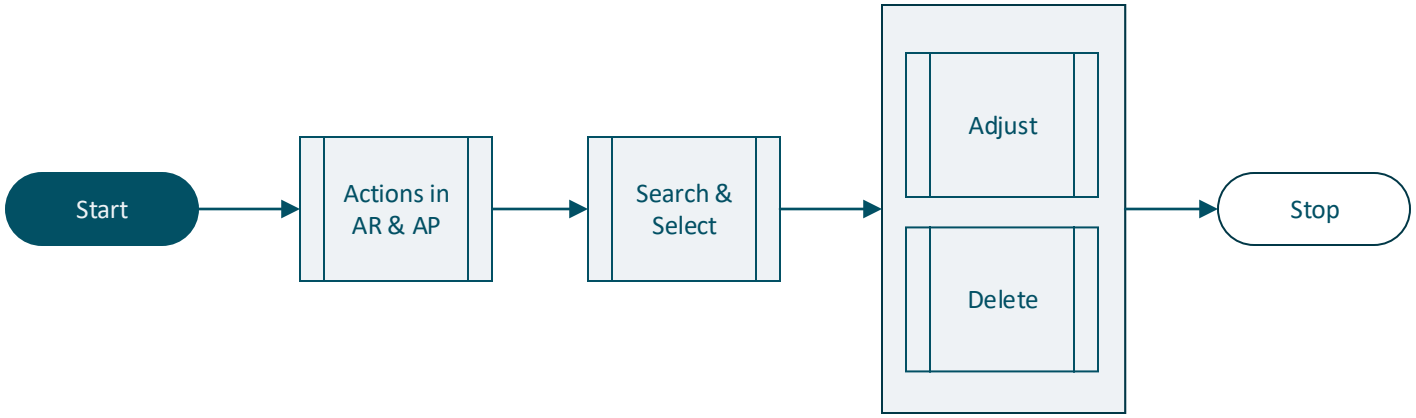
License Requirements:

STAGE: Generate Rebates



Role Assignment:
- AR Entry, Accounting Manager

License Requirements:



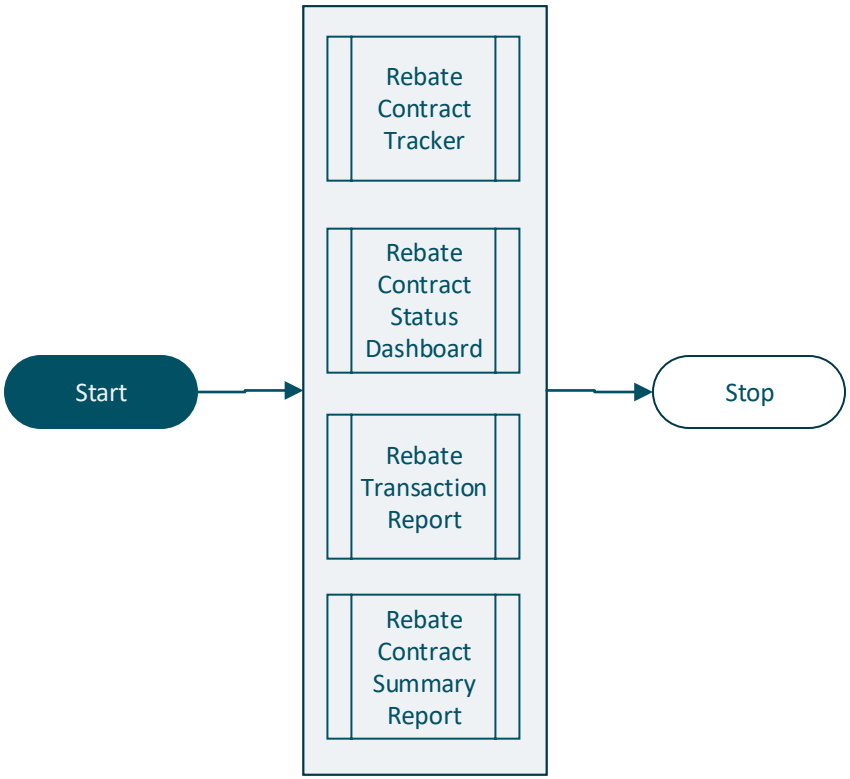
Role Assignment:
- AR Entry, Accounting Manager

License Requirements:

Role Assignment:
- AR Entry, Accounting Manager

License Requirements:

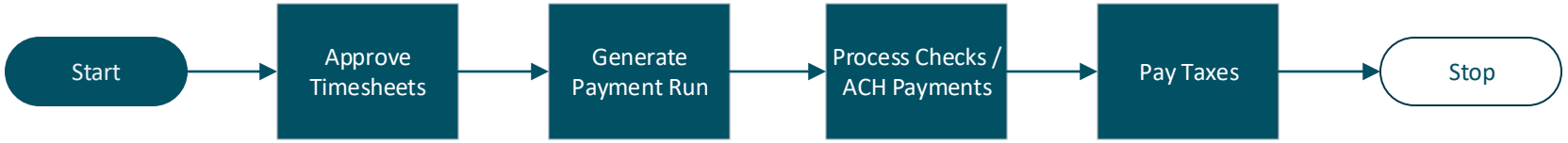
STAGE: Review Rebates



Role Assignment:
- AR Entry, Accounting Manager

License Requirements:

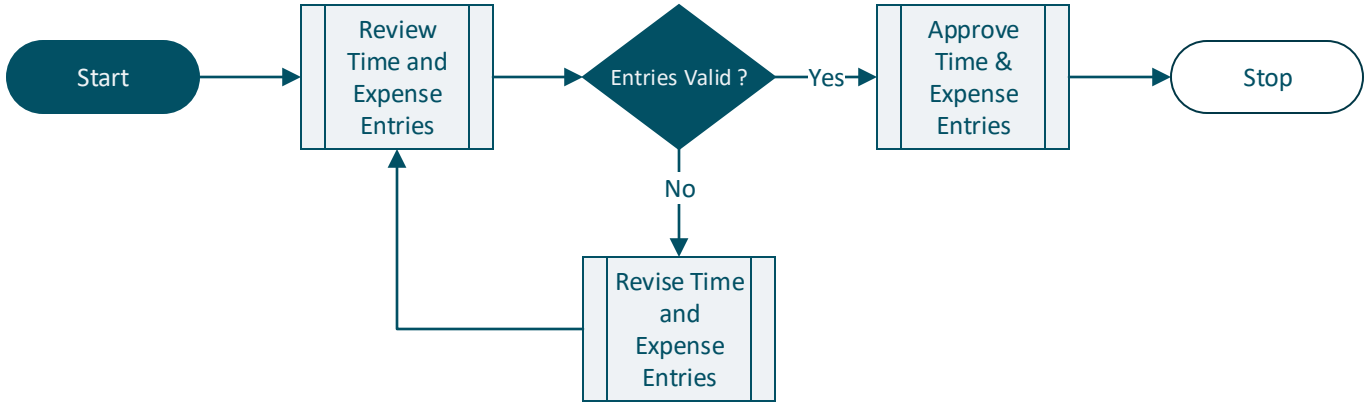
PROCESS: Create Payroll Checks



Role Assignment:
- Payroll Clerk, Accounting Manager

License Requirements:

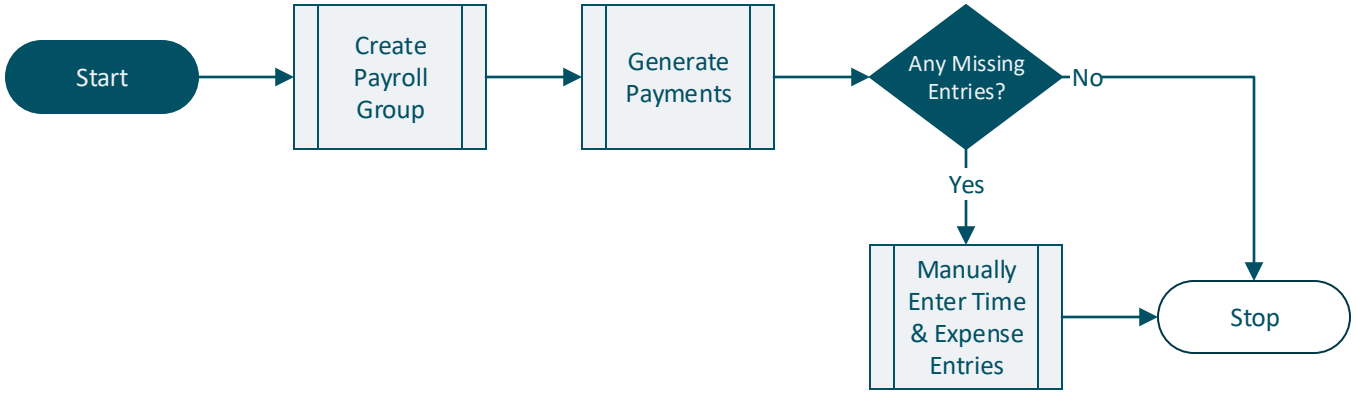
STAGE: Approve Timesheets



Role Assignment:
- Payroll Clerk

License Requirements:

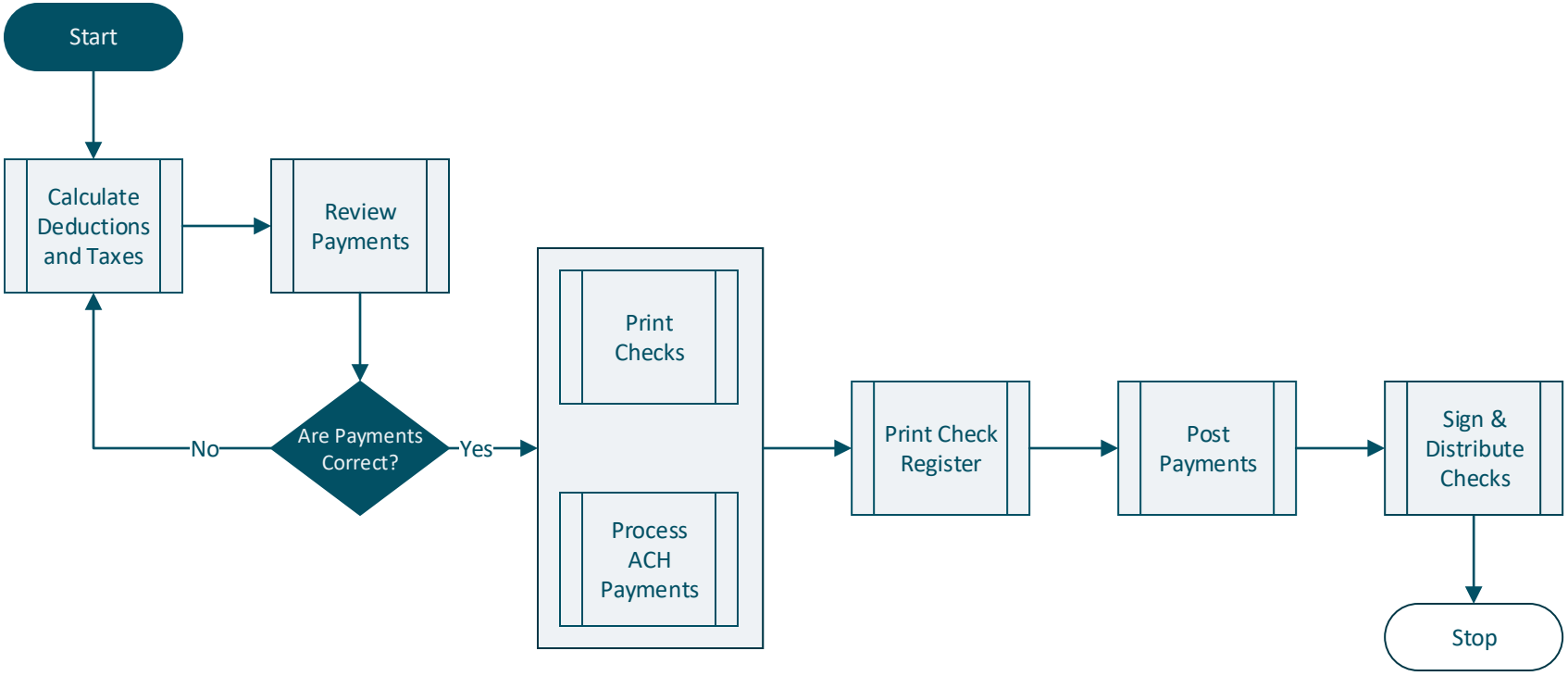
STAGE: Generate Payment Run



Role Assignment:
- Payroll Clerk

License Requirements:

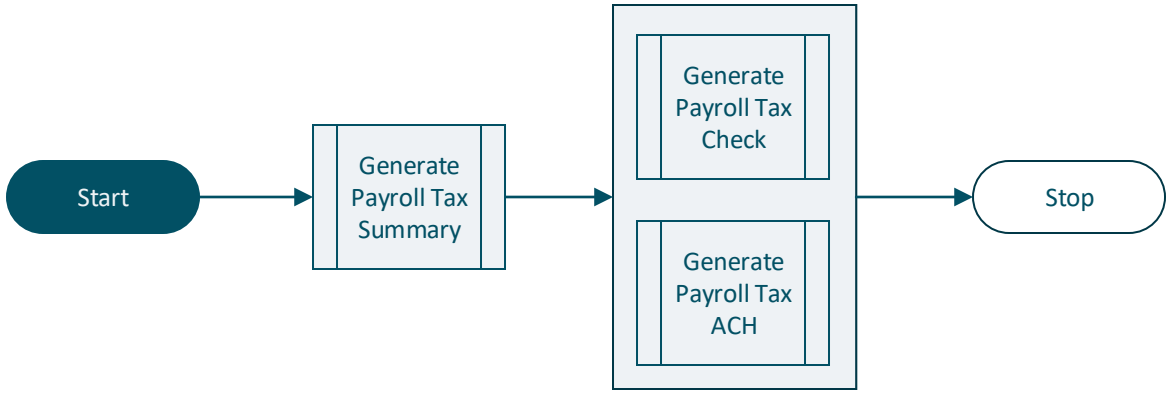
STAGE: Process Checks / ACH Payments



Role Assignment:
- Payroll Clerk

License Requirements:

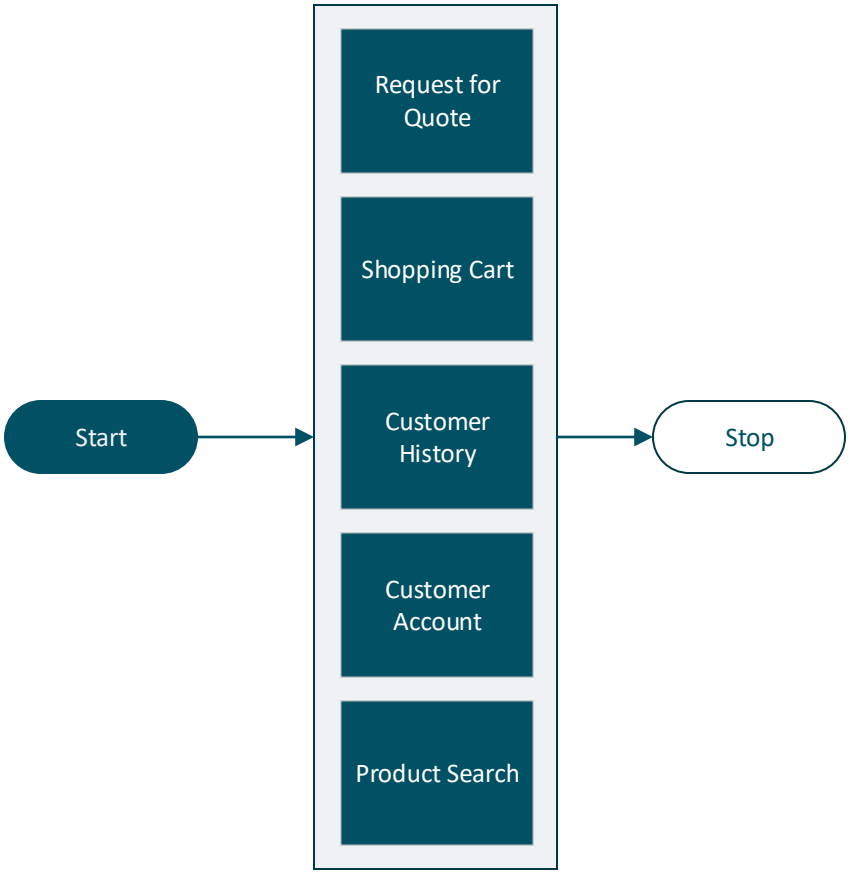
STAGE: Pay Taxes



Role Assignment:
- Accounting Manager

License Requirements:

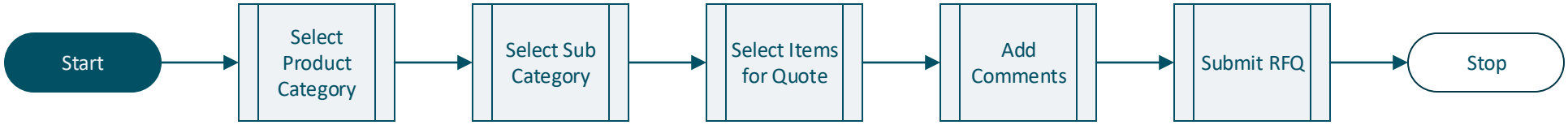
PROCESS: Customer Connect



Role Assignment:
- Customer, Customer Service, Sales

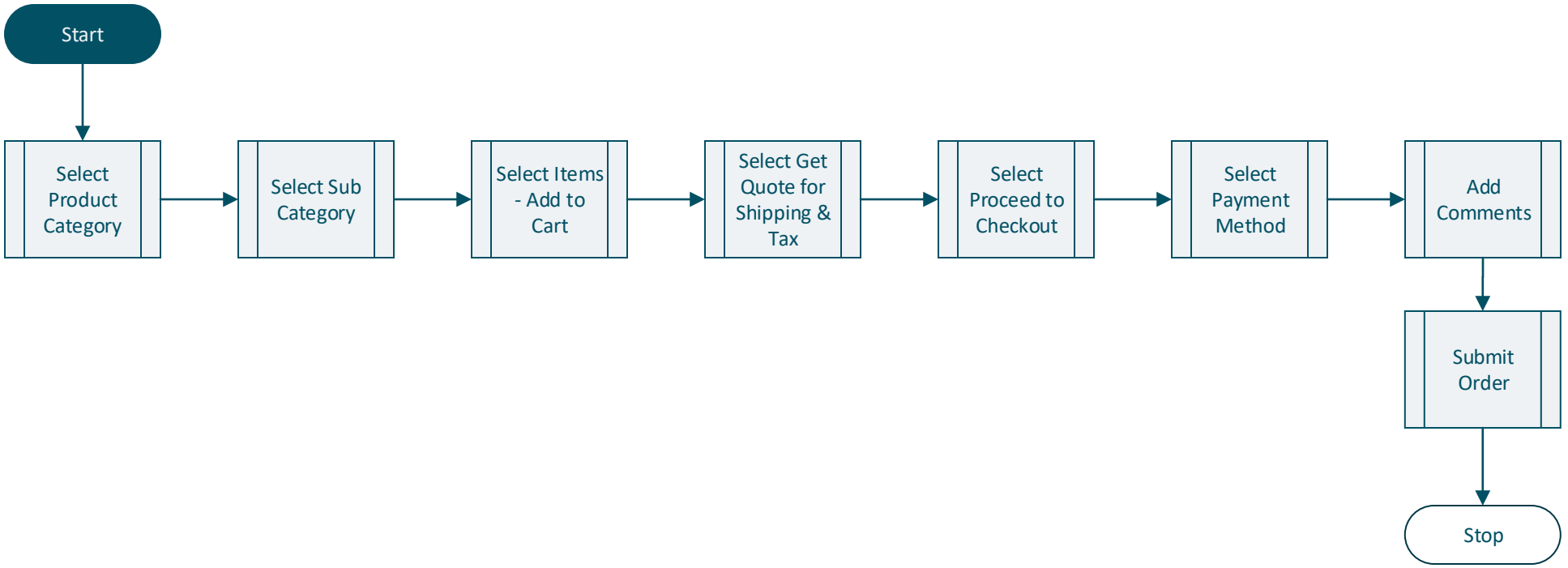
License Requirements:

STAGE: Request for Quote



Role Assignment:
- Customer, Customer Service, Sales

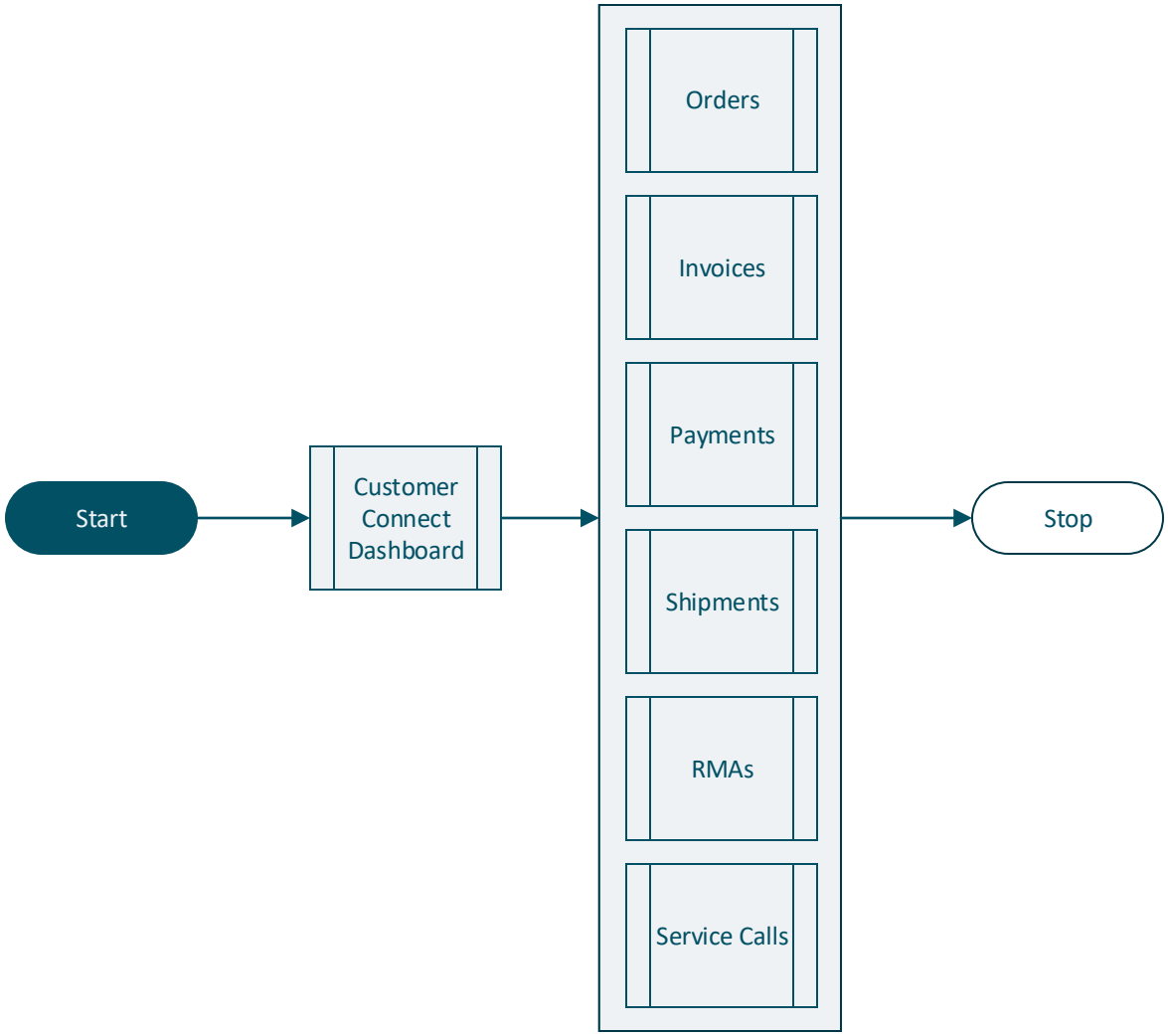
License Requirements:



Role Assignment:
- Customer, Customer Service, Sales

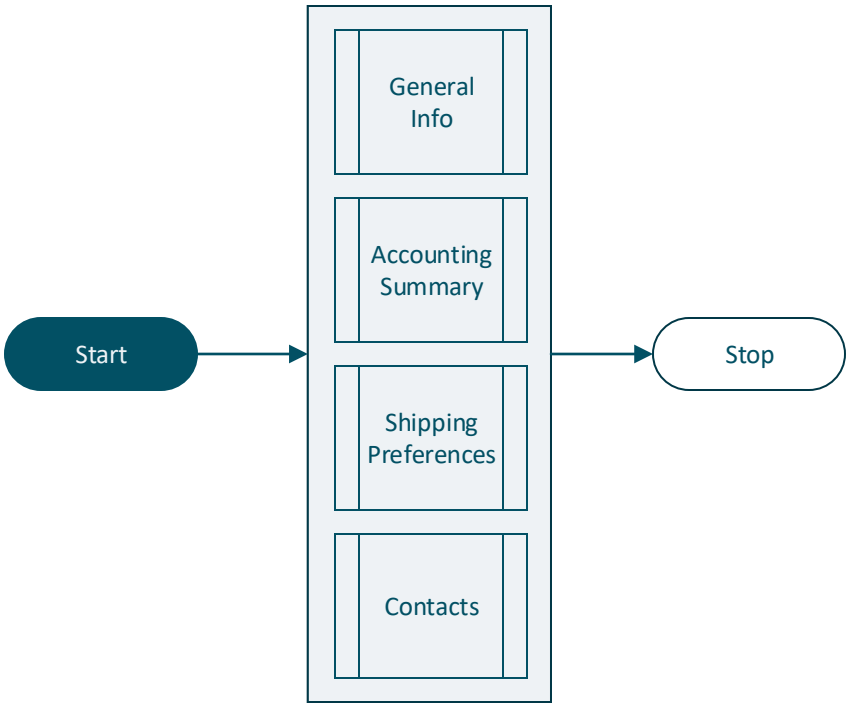
License Requirements:

STAGE: Customer History



Role Assignment:
- Customer, Customer Service, Sales

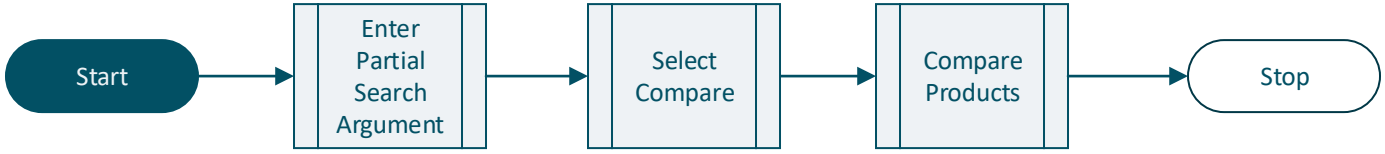
License Requirements:



Role Assignment:
- Customer, Customer Service, Sales

License Requirements:

STAGE: Product Search



Role Assignment:
- Customer, Customer Service, Sales

License Requirements: