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

irchasing

Cost Accounting

Expense Management

Rebates

Shipping and Receiving

Pre-Sales



FUNCTION MENU

PRE-SALES MENU

Marketing
Campaign to
Lead
Generation

Customer Quotes Customer Inquiry

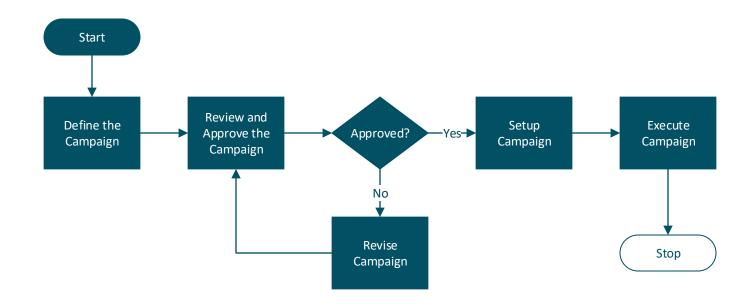
Lead Qualification to Prospect

Maintain Task List



PROCESS: Marketing Campaign to Lead Generation

PRE-SALES MENU



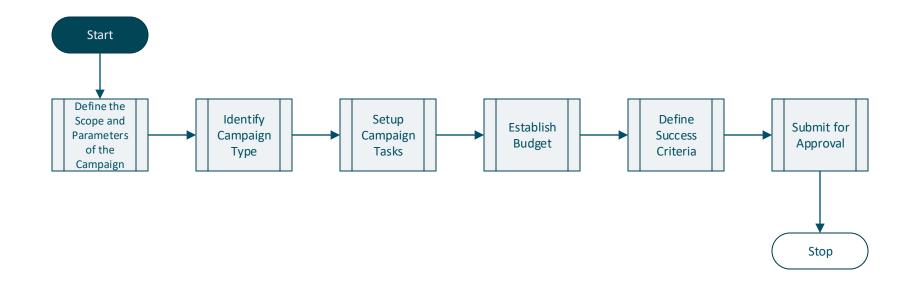
· Marketing

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



STAGE: Define the Campaign

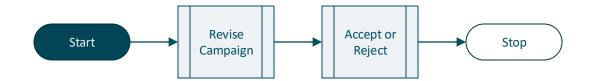
MARKETING CAMPAIGN





STAGE: Review and Approve the Campaign

MARKETING CAMPAIGN





STAGE: Setup Campaign

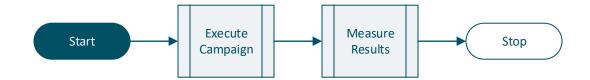
MARKETING CAMPAIGN





STAGE: Execute Campaign

MARKETING CAMPAIGN





Stage: Revise Campaign

MARKETING CAMPAIGN



Pre-Sales

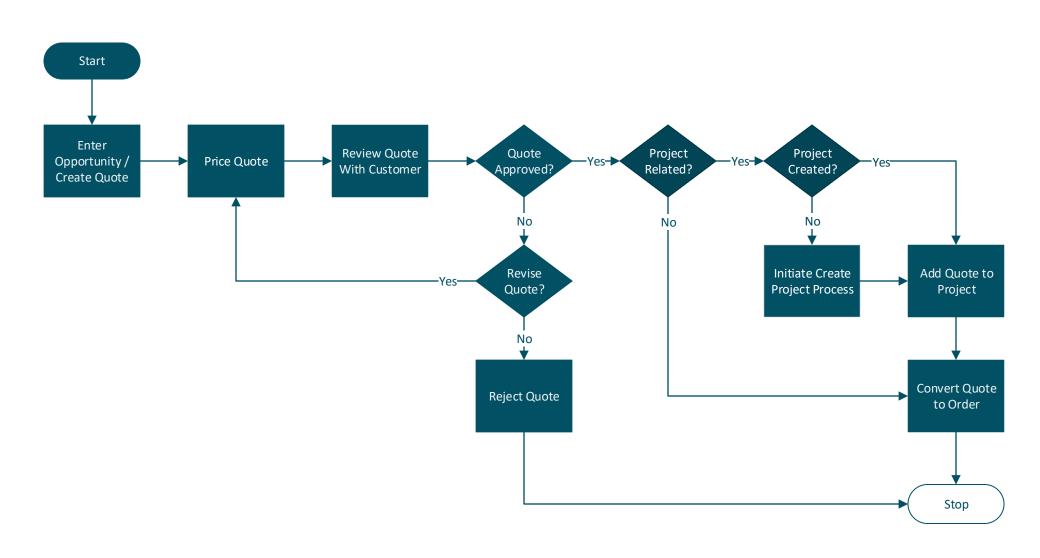
CPICOR

BUSINESS FUNCTION MENU

PROCESS: Customer Quotes

MARKETING CAMPAIGN

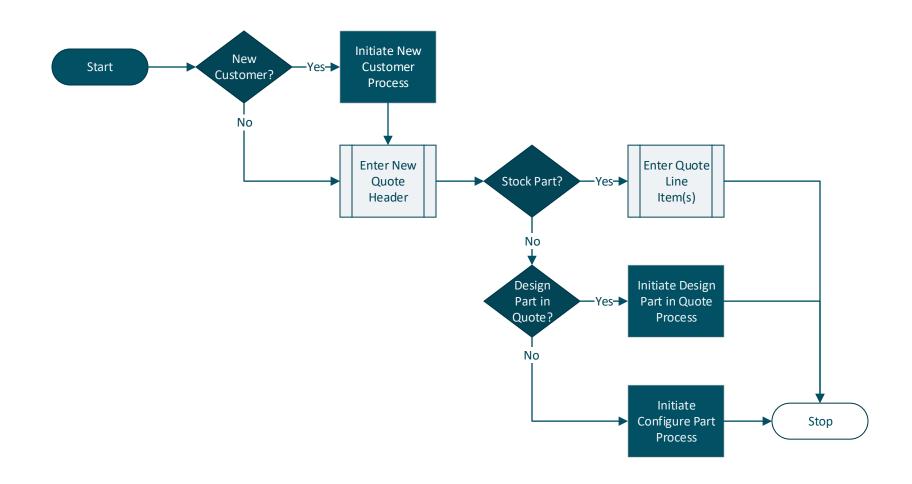
PRE-SALES MENU



- Project Manager/Contracts
License Requirements:

STAGE: Enter Opportunity

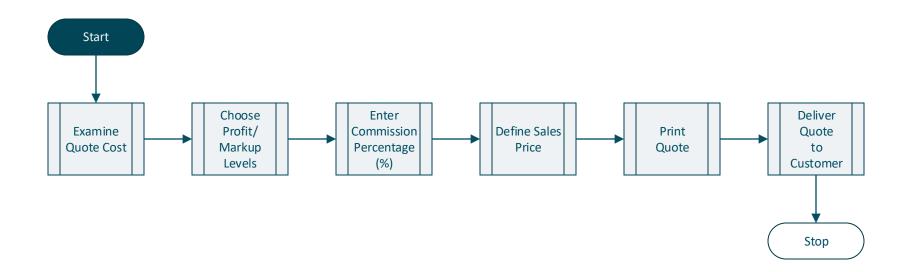
CUSTOMER QUOTES





FUNCTION MENU STAGE: Price Quote

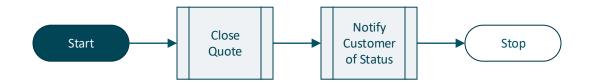
CUSTOMER QUOTES





STAGE: Reject Quote

CUSTOMER QUOTES

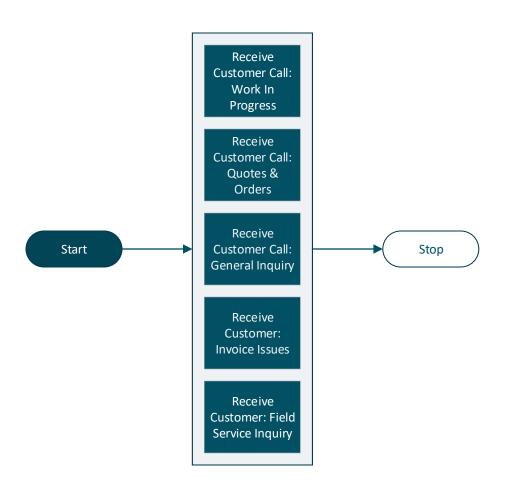




Process: Customer Inquiry

CUSTOMER QUOTES

PRE-SALES MENU



Role Assignments:

- Field Service Technician \Sales

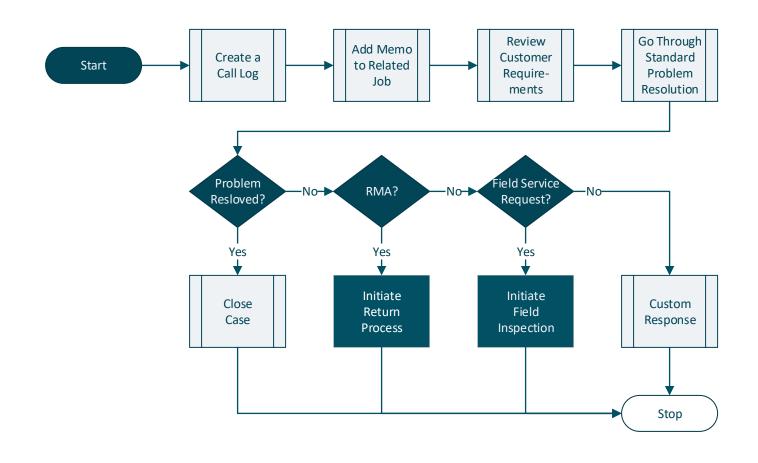
Notes: A request from Customer can go to any Role within Epicor. That individual can then initiate all Stages by creating a Case. Then following Case Workflow, depending on the Call type, they may route the resolution to different department(s).

License Requirements: Project Manager/Contracts



STAGE: Customer Call Regarding Work in Progress

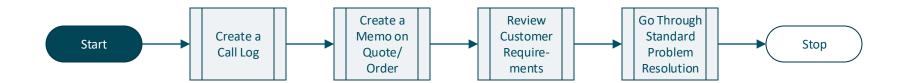
CUSTOMER INQUIRY





STAGE: Customer Calls regarding Quotes and Orders

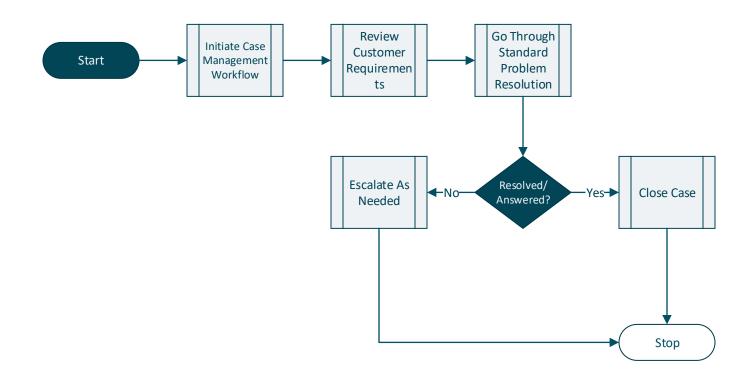
CUSTOMER INQUIRY





STAGE: General Inquiry

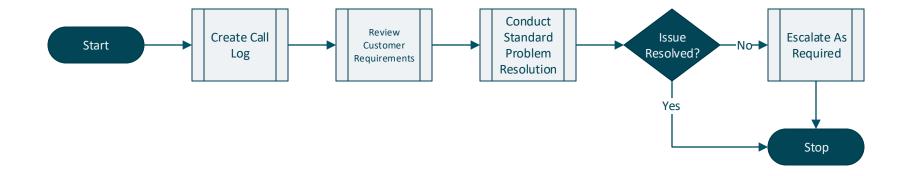
CUSTOMER INQUIRY





STAGE: Invoice Issues Call

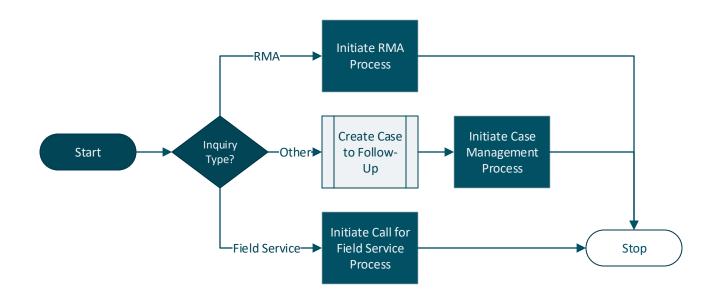
CUSTOMER INQUIRY





STAGE: Field Service Inquiry

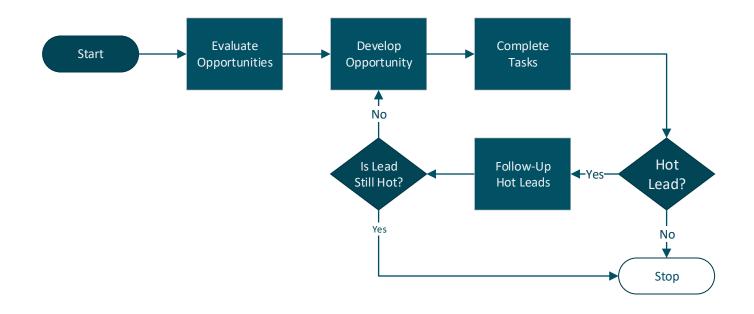
CUSTOMER INQUIRY





PROCESS: Lead Qualification to Prospect

CUSTOMER INQUIRY





STAGE: Evaluate Opportunities

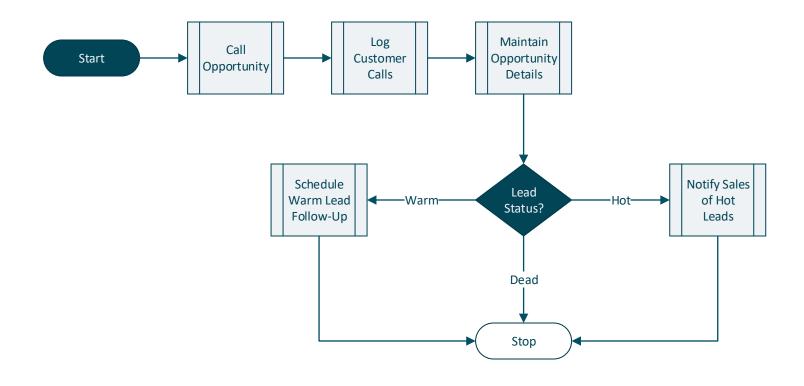
LEAD QUALIFICATION





STAGE: Develop Opportunity

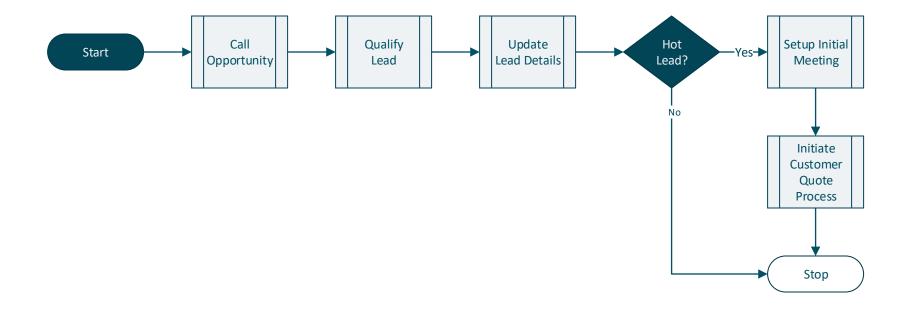
LEAD QUALIFICATION





STAGE: Follow-Up Hot Leads

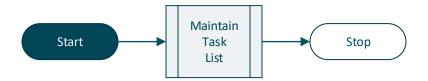
LEAD QUALIFICATION





STAGE: Complete Tasks

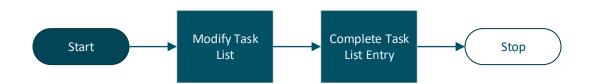
LEAD QUALIFICATION





PROCESS: Maintain Task List

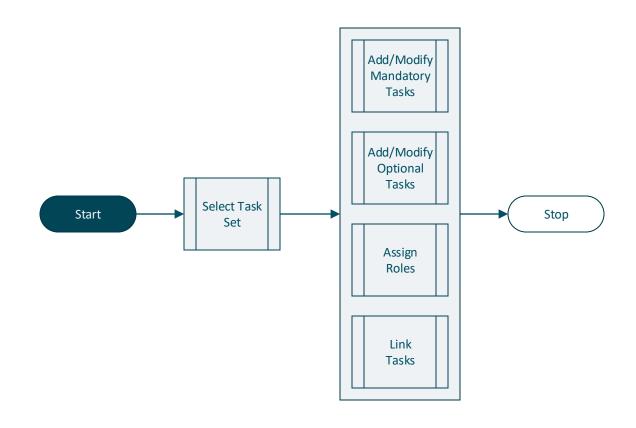
LEAD QUALIFICATION





STAGE: Modify Task List

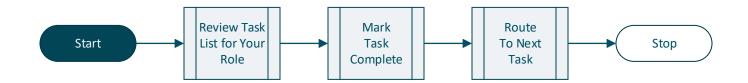
MAINTAIN TASKS





STAGE: Complete Task List Entry

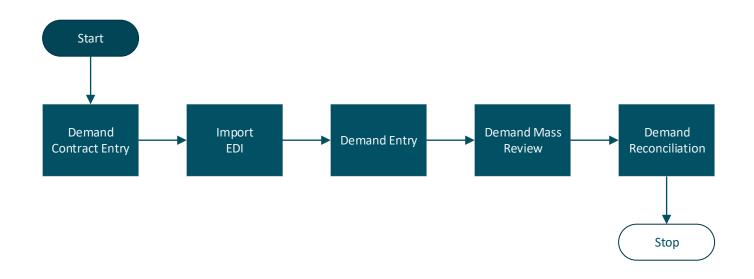
MAINTAIN TASKS





PROCESS: Demand Management

MAINTAIN TASKS

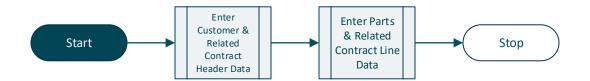




FUNCTION MENU

STAGE: Demand Contract Entry

DEMAND MANAGEMENT



FUNCTION MENU



STAGE: Import EDI

DEMAND MANAGEMENT

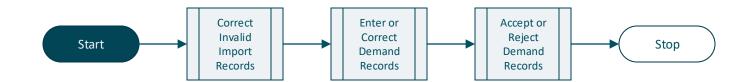


FUNCTION MENU



STAGE: Demand Entry

DEMAND MANAGEMENT

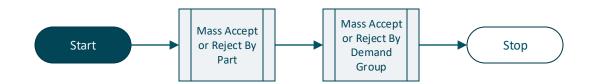


FUNCTION MENU

CPICOR

STAGE: Demand Mass Review

DEMAND MANAGEMENT



FUNCTION MENU

CPICOR

DEMAND MANAGEMENT DEMAND MANAGEMENT

STAGE: Demand Reconciliation



Post-Sales



FUNCTION MENU

POST SALES

Customer Order Change of Address / Contact Information

New Sales Rep RMA Processing Case Management

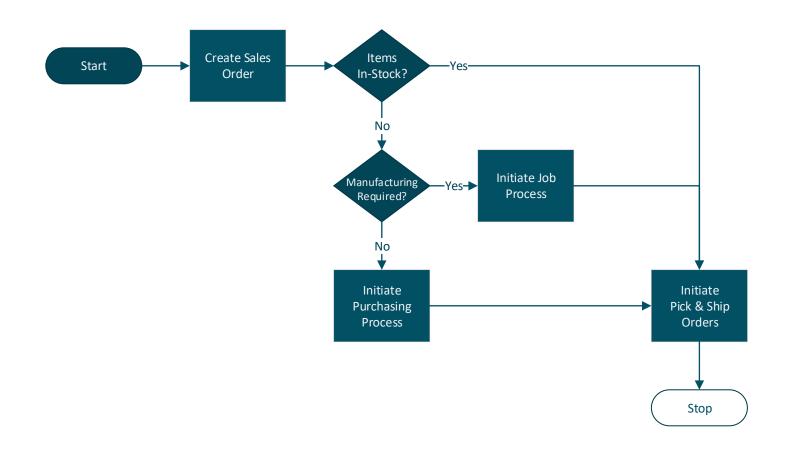
Sales Kits



PROCESS: Customer Order

DEMAND MANAGEMENT

POST-SALES MENU

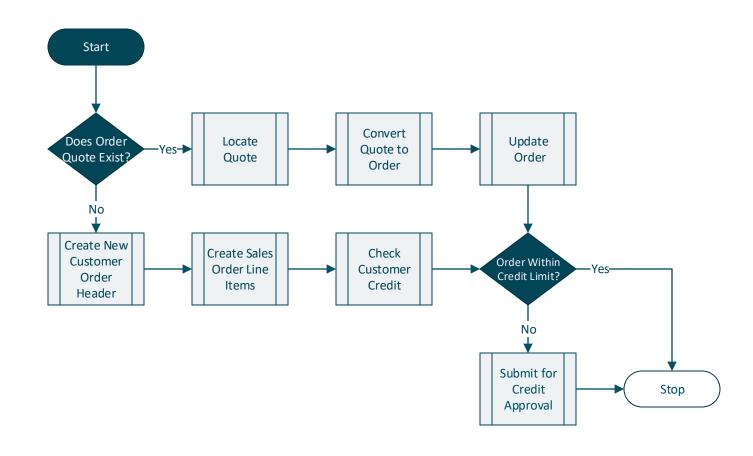




Stage: Create the Sales Order

CUSTOMER ORDER

POST-SALES MENU





STAGE: Initiate Pick & Ship Orders

CUSTOMER ORDER

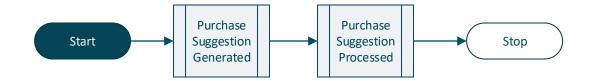
POST-SALES MENU





STAGE: Initiate Purchasing Process

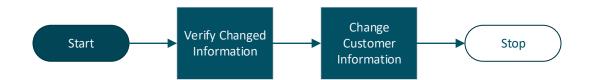
CUSTOMER ORDER





PROCESS: Change of Address/Contact Information

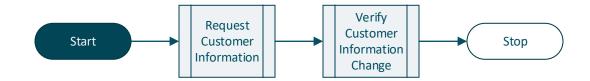
CUSTOMER ORDER





STAGE: Verify Changed Information

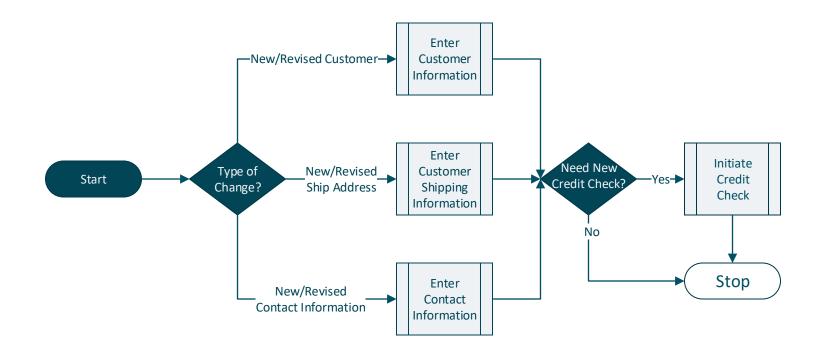
CHANGE OF ADDRESS





STAGE: Change Customer Information

CHANGE OF ADDRESS





PROCESS: New/Modified Sales Rep

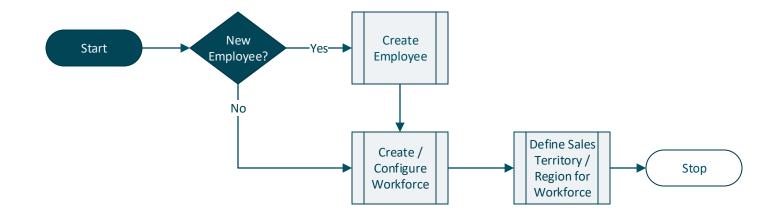
CHANGE OF ADDRESS





STAGE: Establish New Sales Rep

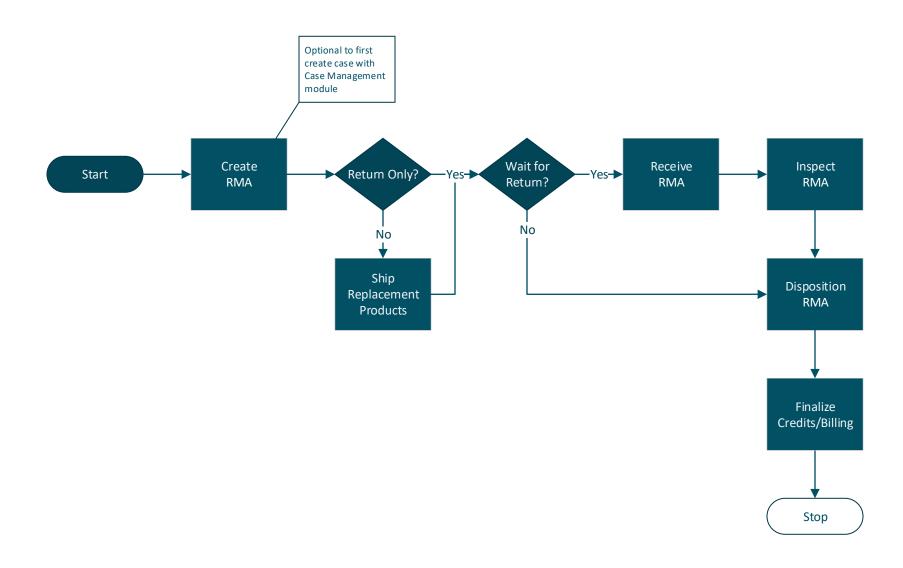
NEW SALES REP



PROCESS: RMA Processing

NEW SALES REP

POST-SALES MENU



Role Assignment:

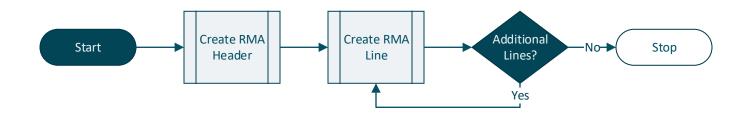
- Sales / Quality / Shipping and Receiving / Finance

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:



STAGE: Create RMA

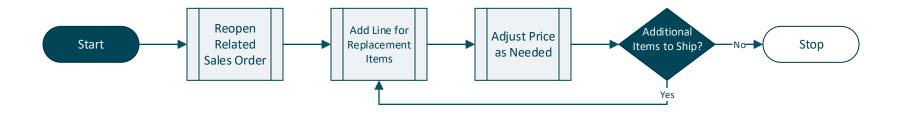
RMA PROCESSING





STAGE: Ship Replacement Products

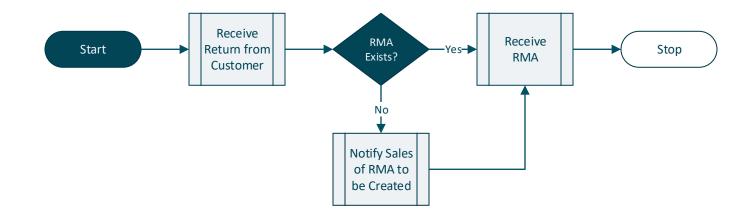
RMA PROCESSING





STAGE: Receive RMA

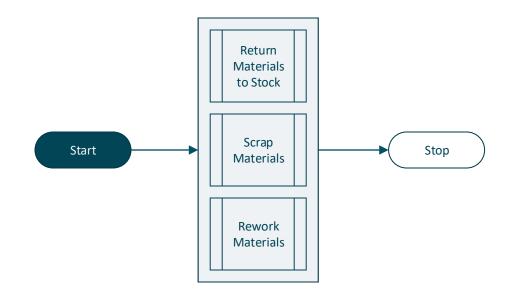
RMA PROCESSING





FUNCTION MENU STAGE: Inspect RMA

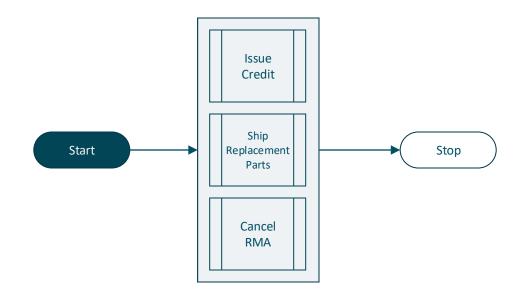
RMA PROCESSING





FUNCTION MENU STAGE: Disposition RMA

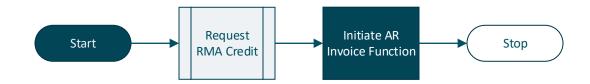
RMA PROCESSING





STAGE: Finalize Credits/Billing

RMA PROCESSING





PROCESS: Case Management

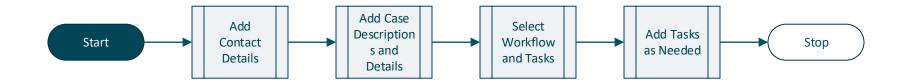
RMA PROCESSING





FUNCTION MENU STAGE: Create Case

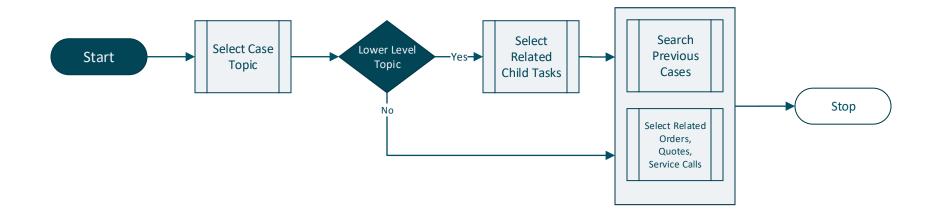
CASE MANAGEMENT



CASE MANAGEMENT

POST-SALES MENU

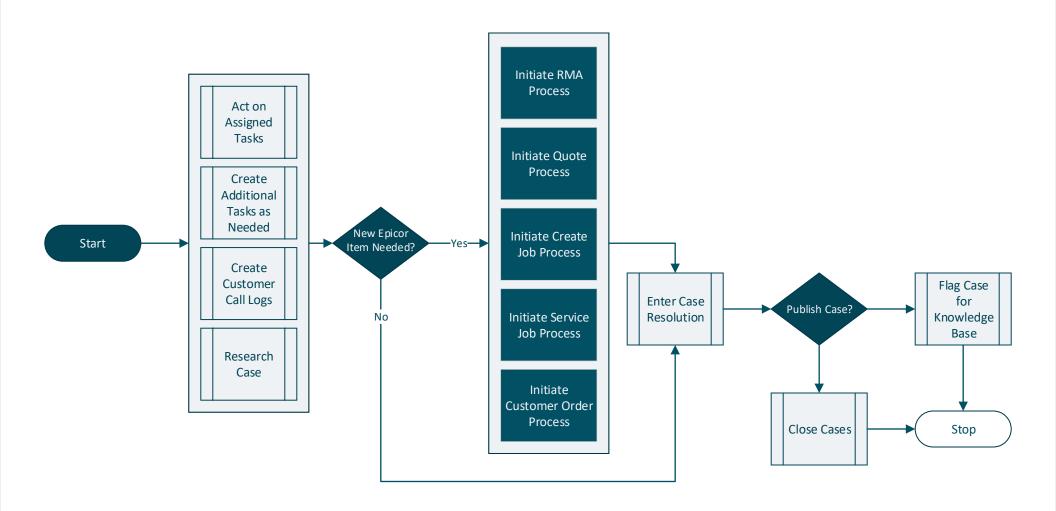
STAGE: Research Case





FUNCTION MENU STAGE: Resolve Case

CASE MANAGEMENT





FUNCTION MENU PROCESS: Sales Kits

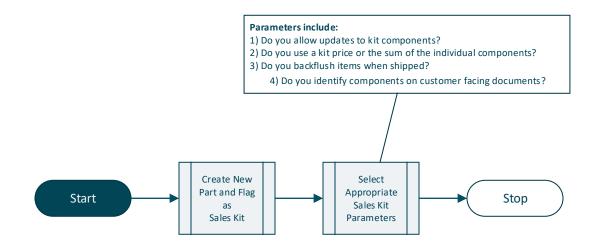
CASE MANAGEMENT





FUNCTION MENU STAGE: Setup Part

SALES KITS

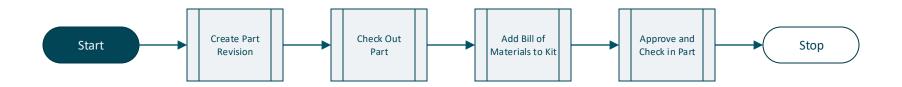




STAGE: Engineer Sales Kit

SALES KITS

POST-SALES MENU

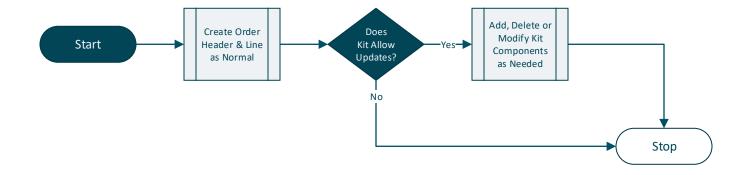


Notes: NOTE: There is no bill of operations in a sales kit. Items are shipped from stock without any time capture. License Requirements:



STAGE: Process Sales Kit Sales Order

SALES KITS





FUNCTION MENU

CONTRACTS AND PROJECT MENU

Projects

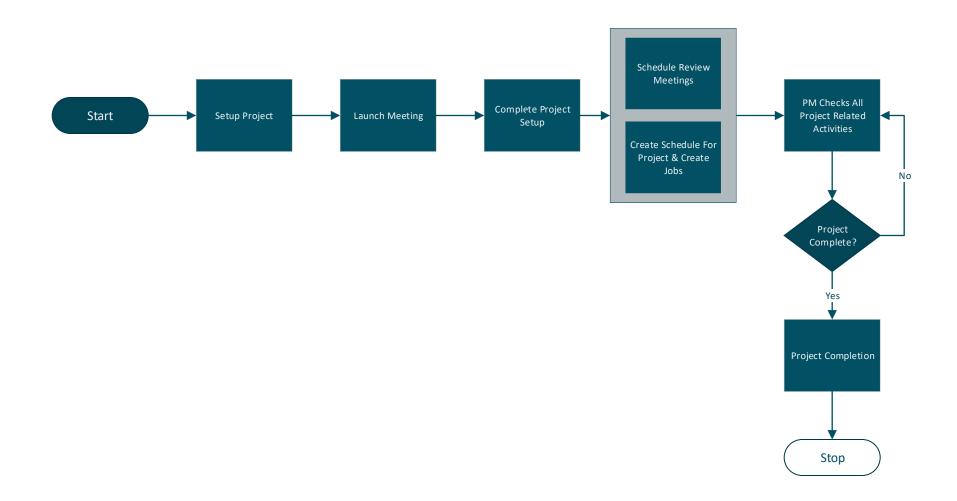
Time and Milestone Billing

Cost Plus Billing Fixed Fee Billing Progress Pay Billing Program Management



FUNCTION MENU Process: Projects

SALES KITS

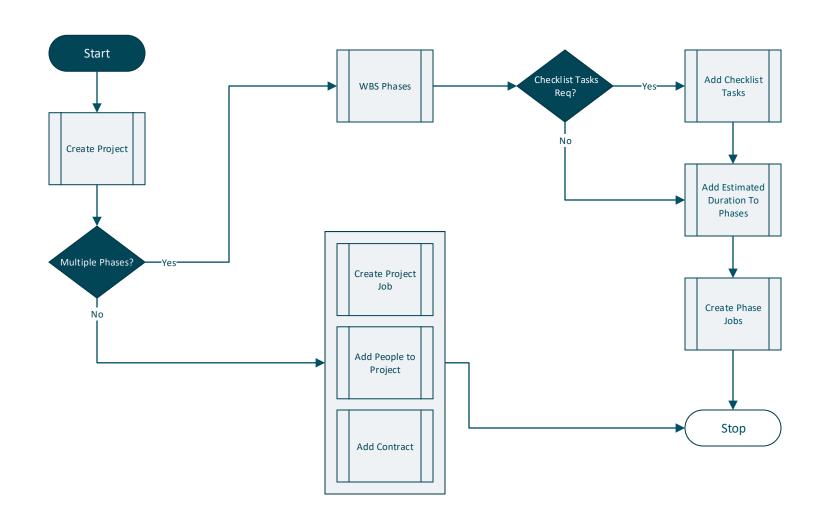


FUNCTION MENU



Stage: Setup Project

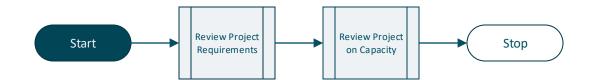
PROJECTS





STAGE: Launch Meeting

PROJECTS

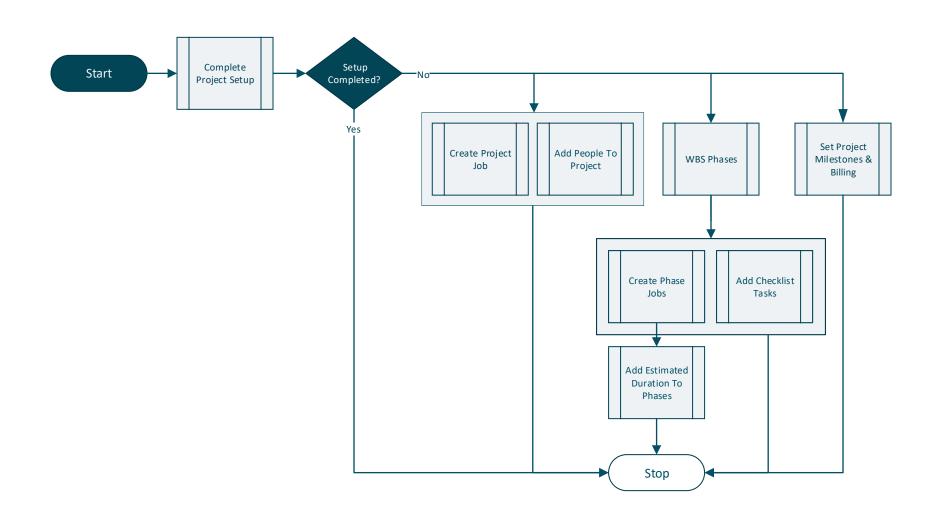


FUNCTION MENU

CPICOR

STAGE: Complete Project Setup

PROJECTS





STAGE: Schedule Review Meetings

PROJECTS





FUNCTION MENU

STAGE: Create Schedule for Project - Create Jobs

PROJECTS



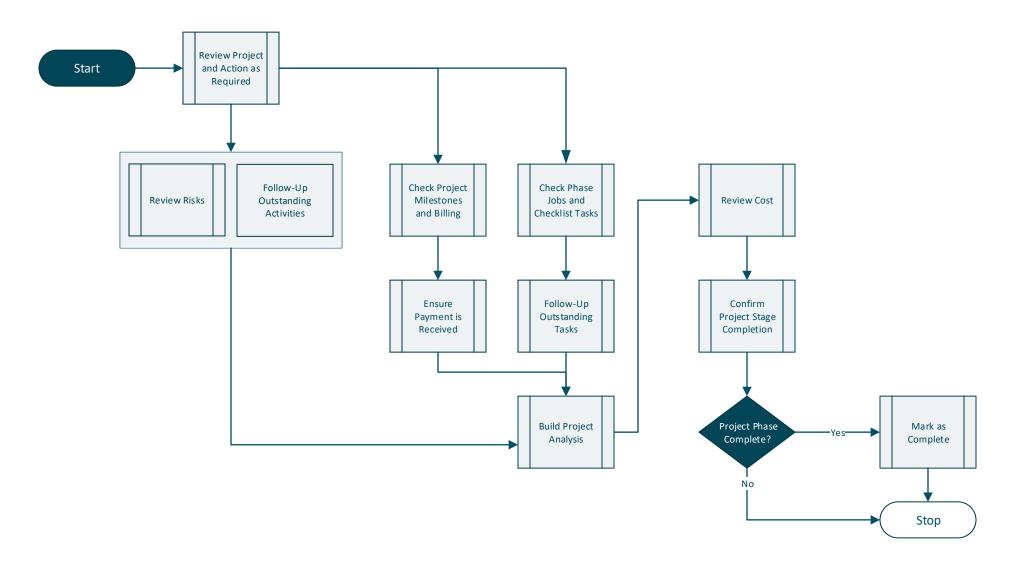


FUNCTION MENU

Stage: PM Checks All Project Related Activities

PROJECTS

CONTRACTS AND PROJECTS MENU



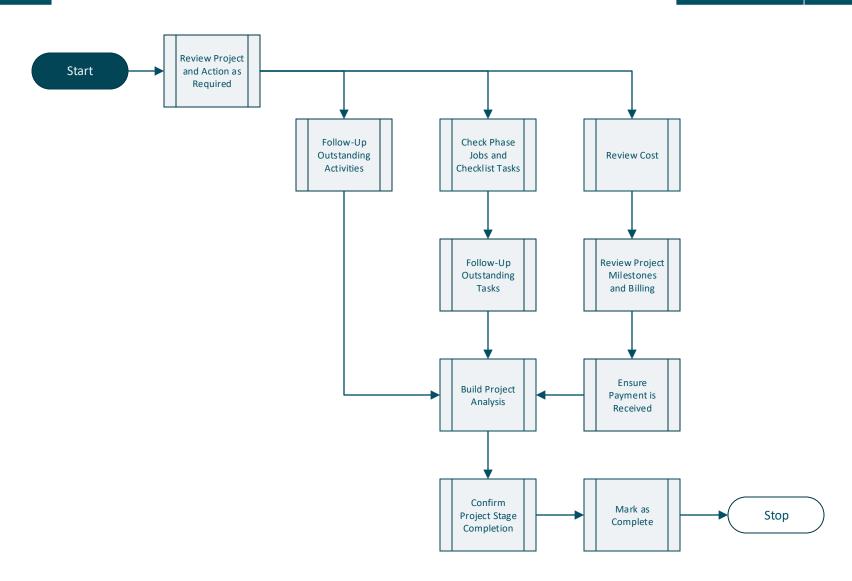
License Requirements: Project Management

FUNCTION MENU

CPICOR

STAGE: Project Completion

PROJECTS

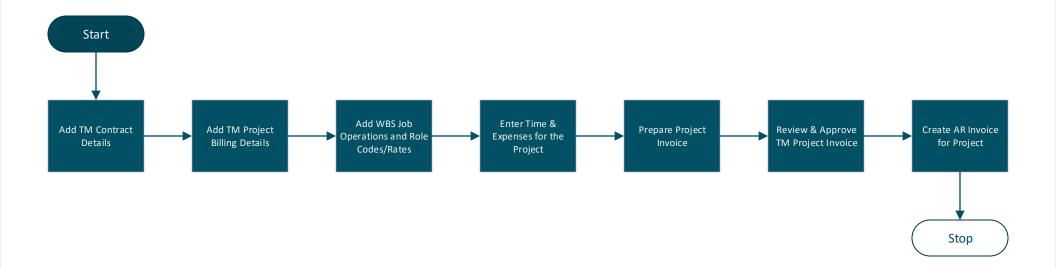


FUNCTION MENU



PROCESS: T & M Billing

PROJECTS

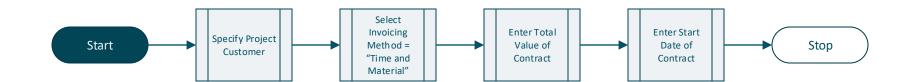




FUNCTION MENU

STAGE: Add TM Contract Details

TIME AND MILESTONE

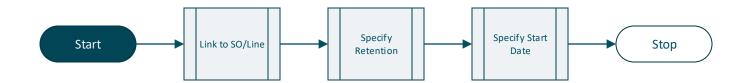




FUNCTION MENU

STAGE: Add TM Project Billing Details

TIME AND MILESTONE





FUNCTION MENU

STAGE: Add WBS Job Operations, Roles and Hours

TIME AND MILESTONE





FUNCTION MENU

STAGE: Enter Time & Expenses for the Project

TIME AND MILESTONE





FUNCTION MENU

STAGE: Prepare Project Invoice

TIME AND MILESTONE





FUNCTION MENU

STAGE: Review & Approve TM Project Invoice

TIME AND MILESTONE



CPICOR

FUNCTION MENU

STAGE: Create AR Invoice for Project

TIME AND MILESTONE

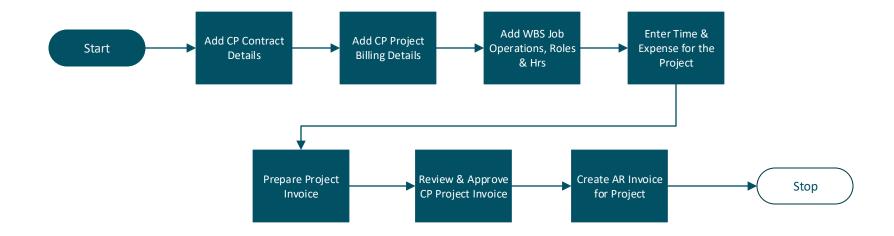


FUNCTION MENU



PROCESS: Cost Plus Billing

TIME AND MILESTONE

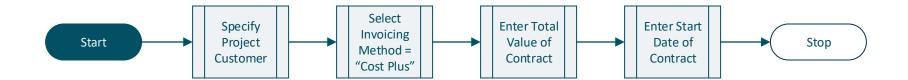


FUNCTION MENU



STAGE: Add CP Contract Details

COST PLUS BILLING

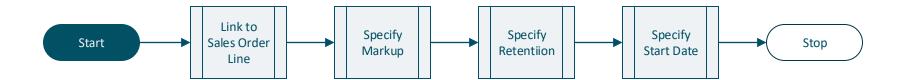




FUNCTION MENU

STAGE: Add CP Project Billing Details

COST PLUS BILLING

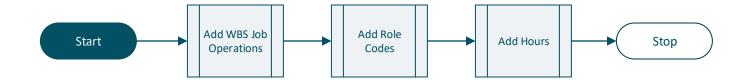




FUNCTION MENU

STAGE: Add WBS Job Operations, Roles and Hours

COST PLUS BILLING





FUNCTION MENU

STAGE: Enter Time & Expenses for the Project

COST PLUS BILLING





FUNCTION MENU

STAGE: Prepare Project Invoice

COST PLUS BILLING





FUNCTION MENU

STAGE: Review & Approve CP Project Invoice

COST PLUS BILLING





FUNCTION MENU

STAGE: Create AR Invoice for Project

COST PLUS BILLING

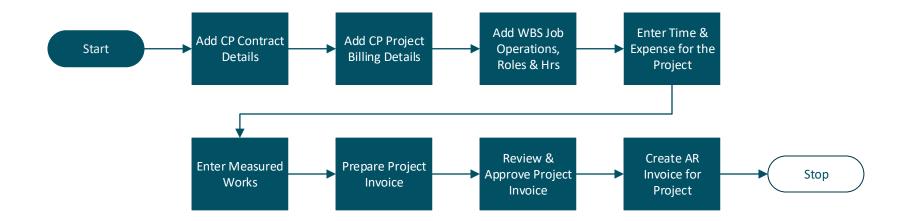


FUNCTION MENU

CPICOR

PROCESS: Fixed Fee Billing

COST PLUS BILLING



FUNCTION MENU



STAGE: Add Contract Details

FIXED FEE BILLING



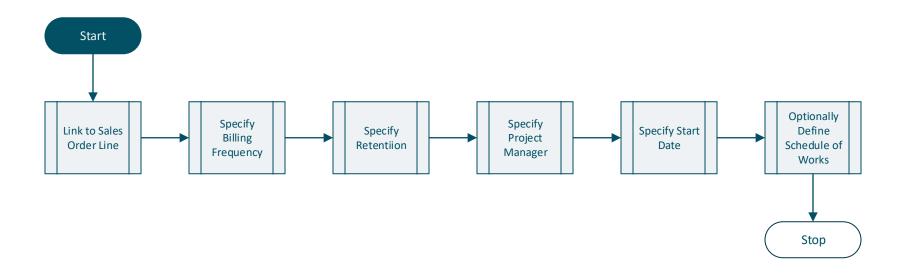
FUNCTION MENU

CPICOR

FIXED FEE BILLING

CONTRACTS AND PROJECTS MENU

STAGE: Add Progress Payment Details





FUNCTION MENU

STAGE: Add WBS Job Operations, Roles and Hours

FIXED FEE BILLING

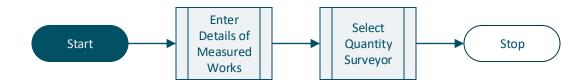




FUNCTION MENU

STAGE: Enter Measured Works

FIXED FEE BILLING





FUNCTION MENU

STAGE: Prepare Project Invoice

FIXED FEE BILLING



CPICOR

FUNCTION MENU

STAGE: Review & Approve Project Invoice

FIXED FEE BILLING





FUNCTION MENU

STAGE: Create AR Invoice for Project

FIXED FEE BILLING

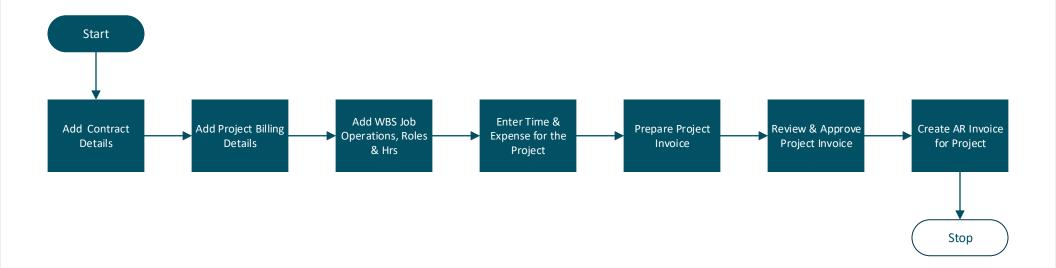


FUNCTION MENU

CPICOR

PROCESS: Progress Pay Billing

FIXED FEE BILLING



FUNCTION MENU



STAGE: Add Contract Details

PROGRESS PAY BILLING

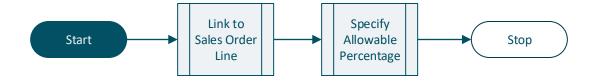




FUNCTION MENU

STAGE: Add Project Billing Schedules

PROGRESS PAY BILLING





FUNCTION MENU

STAGE: Add WBS Job Operations, Roles and Hours

PROGRESS PAY BILLING





FUNCTION MENU

STAGE: Enter Time & Expenses for the Project

PROGRESS PAY BILLING



CPICOR

FUNCTION MENU

STAGE: Prepare Project Invoice

PROGRESS PAY BILLING



FUNCTION MENU



STAGE: Review & Approve Project Invoice

PROGRESS PAY BILLING





FUNCTION MENU

STAGE: Create AR Invoice for Project

PROGRESS PAY BILLING

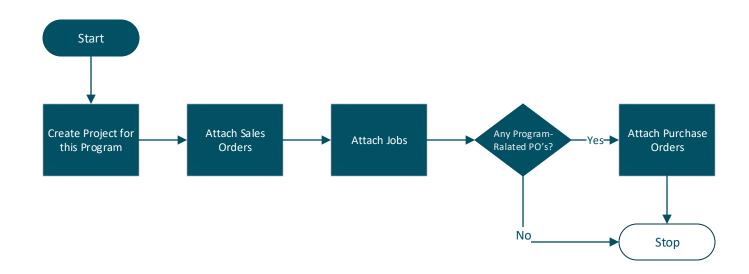


FUNCTION MENU



PROCESS: Program Management

PROGRESS PAY BILLING



CPICOR

FUNCTION MENU

STAGE: Create Project for this Program

PROGRAM MANAGEMENT

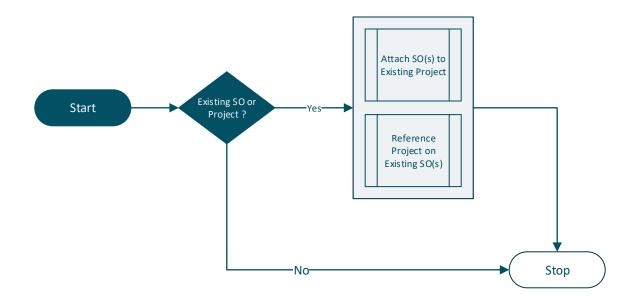


FUNCTION MENU



STAGE: Attach Sales Orders

PROGRAM MANAGEMENT

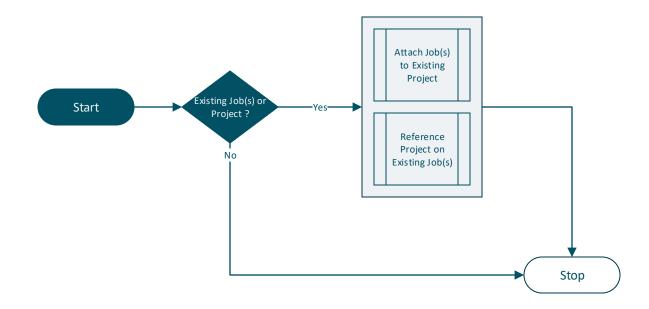


FUNCTION MENU



STAGE: Attach Jobs

PROGRAM MANAGEMENT

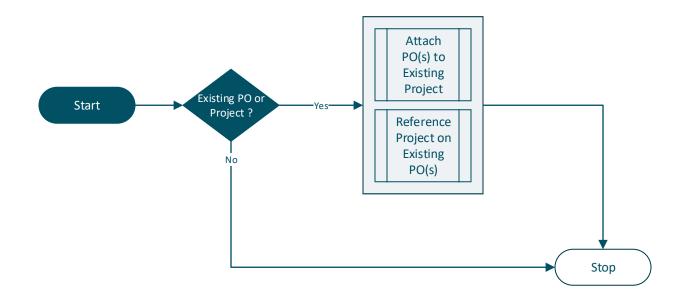


CPICOR

FUNCTION MENU

STAGE: Attach Purchase Orders

PROGRAM MANAGEMENT



Purchasing

CPICOR

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 Qualifications

Purchase Requisitions Purchasing Setup

Create New Supplier

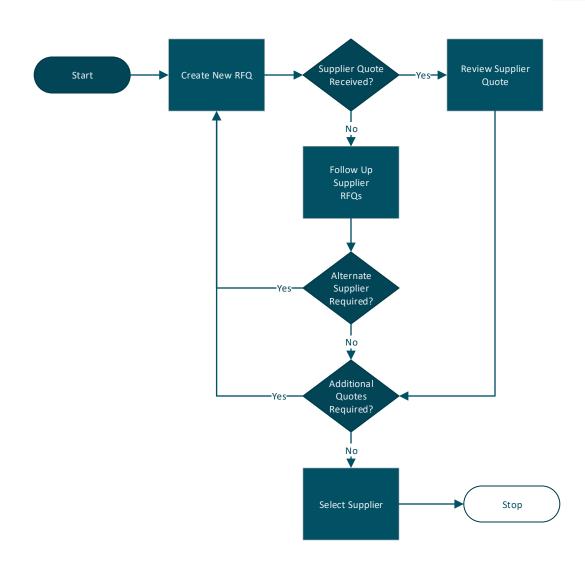
Landed Cost Entry

Create Buyer



FUNCTION MENU PROCESS: SUPPLIER QUOTES

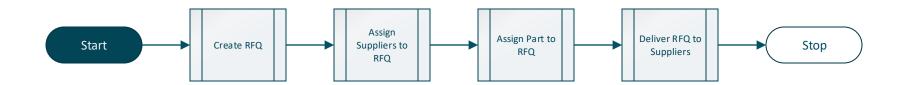
PROGRAM MANAGEMENT





FUNCTION MENU STAGE: Create New RFQ

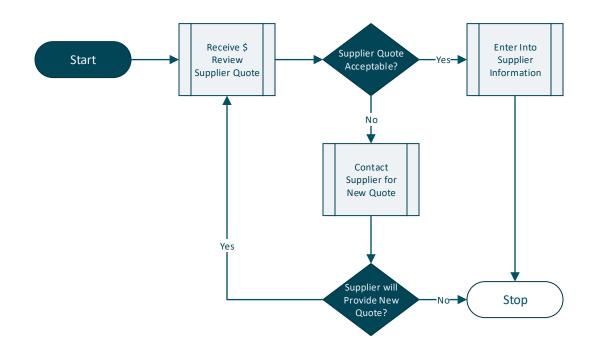
SUPPLIER QUOTES



FUNCTION MENU

STAGE: Review Supplier Quote

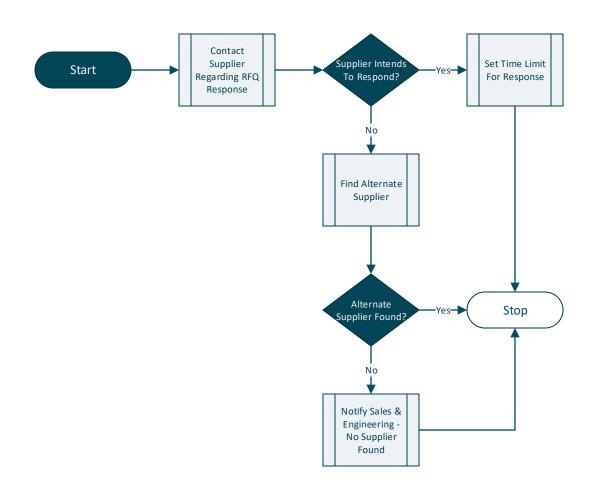
SUPPLIER QUOTES



FUNCTION MENU

STAGE: Follow-Up Suppliers RFQs

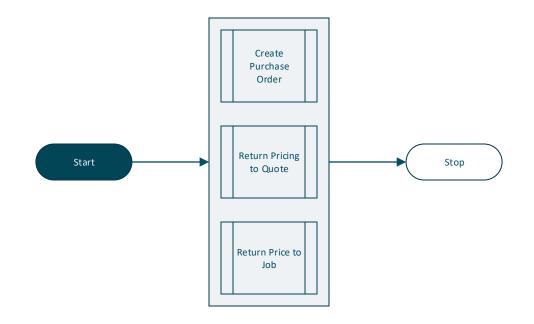
SUPPLIER QUOTES





STAGE: Select Supplier

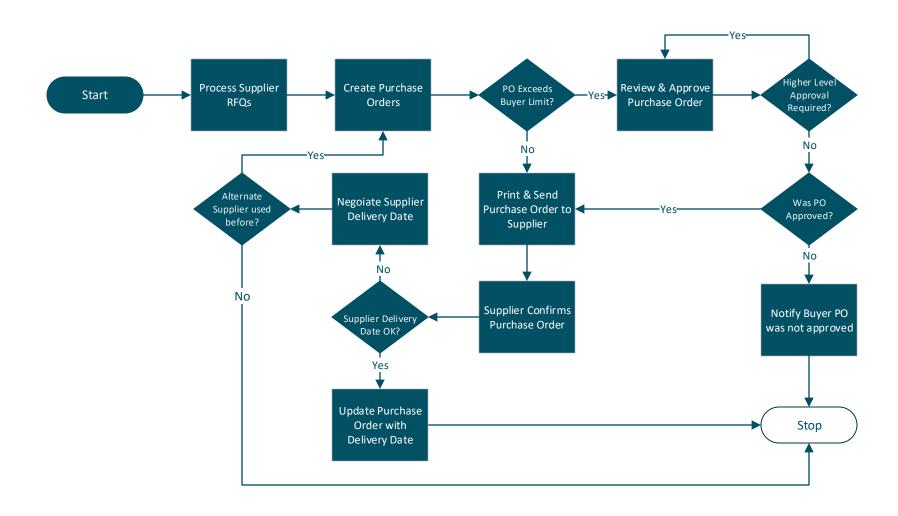
SUPPLIER QUOTES





PROCESS: Purchase Orders

SUPPLIER QUOTES



STAGE: Process Supplier RFQ's

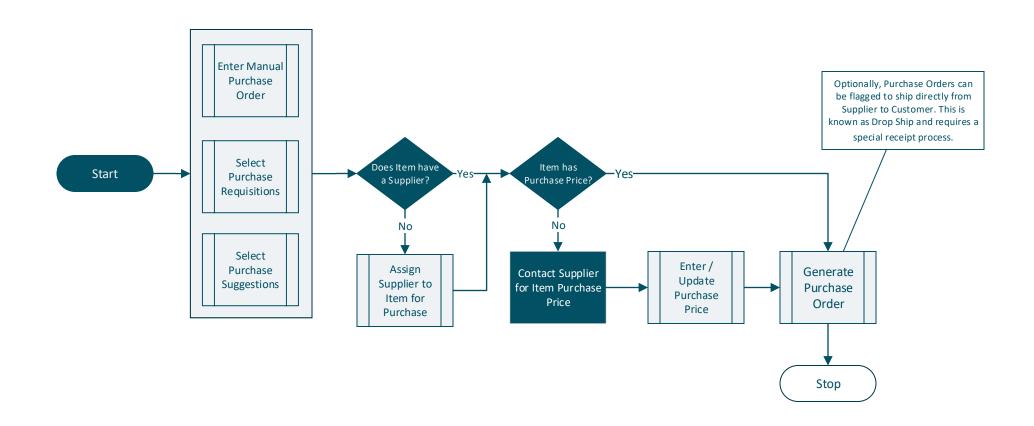
PURCHASE ORDERS





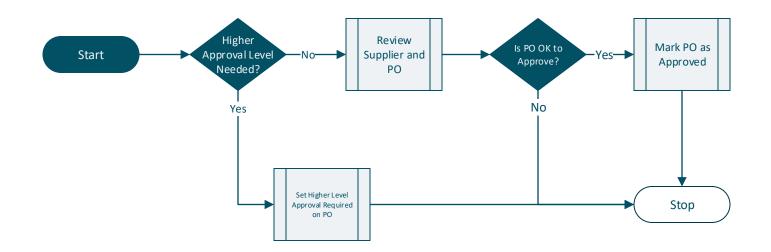
STAGE: Create Purchase Orders

PURCHASE ORDERS



STAGE: Review and Approve PO

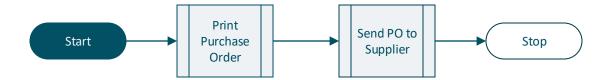
PURCHASE ORDERS





STAGE: Print and Send PO to Supplier

PURCHASE ORDERS



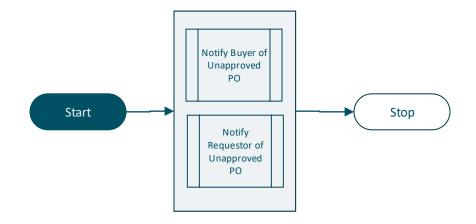
FUNCTION MENU STAGE: Supplier Confirms PO

PURCHASE ORDERS



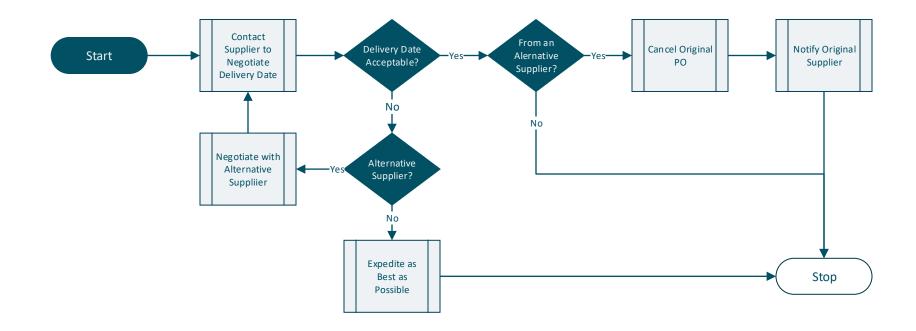
STAGE: Notify Buyer of Unapproved PO

PURCHASE ORDERS



STAGE: Negotiate Supplier Delivery Date

PURCHASE ORDERS





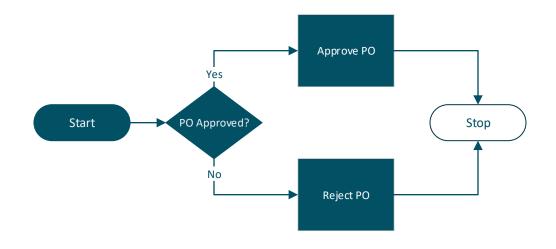
STAGE: Update PO with Delivery Date

PURCHASE ORDERS



PROCESS: PO Approval Process

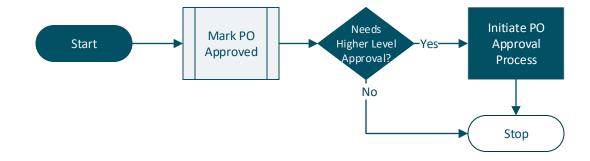
PURCHASE ORDERS





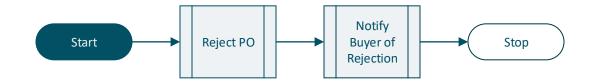
FUNCTION MENU STAGE: Approve PO

PO APPROVAL



STAGE: Reject PO

PO APPROVAL



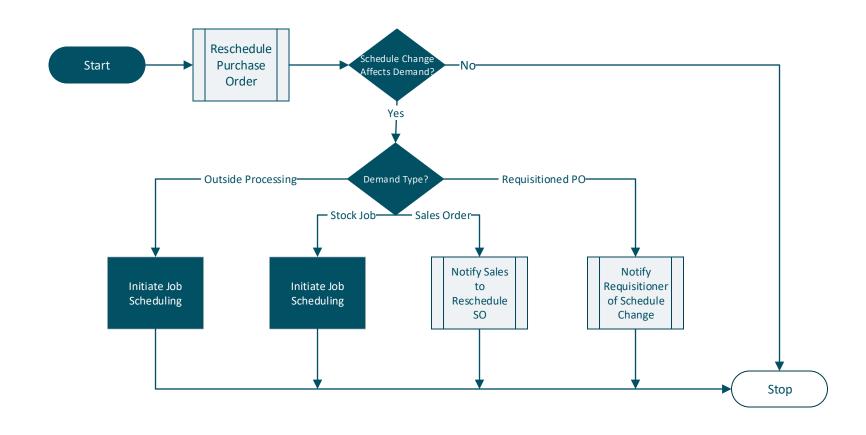
PROCESS: Reschedule Purchase Order

PO APPROVAL



STAGE: Reschedule Purchase Order

RESCHEDULE PO





PROCESS: Landed Cost and Container Tracking

RESCHEDULE PO

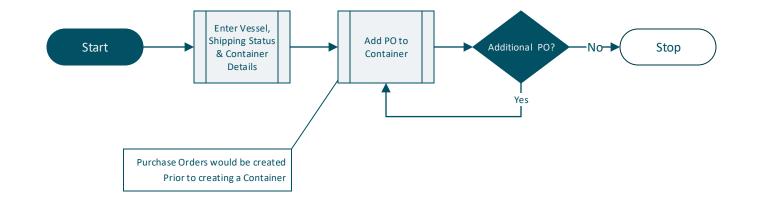




STAGE: Create Container

LANDED COST / CONTAINERS

PURCHASING MENU



License Requirements:: Landed Cost Management

Purchasing

FUNCTION MENU



LANDED COST / CONTAINERS

PURCHASING MENU

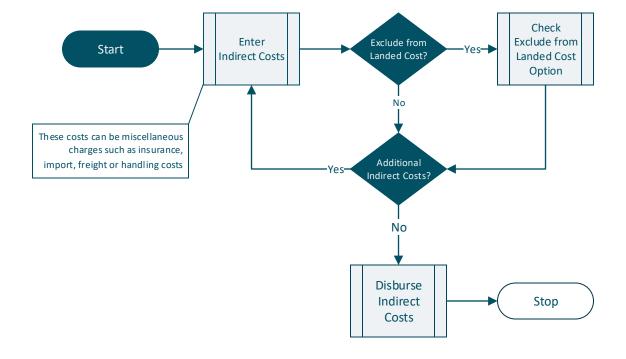
STAGE: Update Shipping Status



LANDED COST / CONTAINERS

PURCHASING MENU

STAGE: Process Landed Costs



Purchasing

CPICOR

LANDED COST / CONTAINERS

PURCHASING MENU

FUNCTION MENU

STAGE: Receive and Complete the Shipment





PROCESS: Notify of PO Schedule Change

LANDED COST /
CONTAINERS

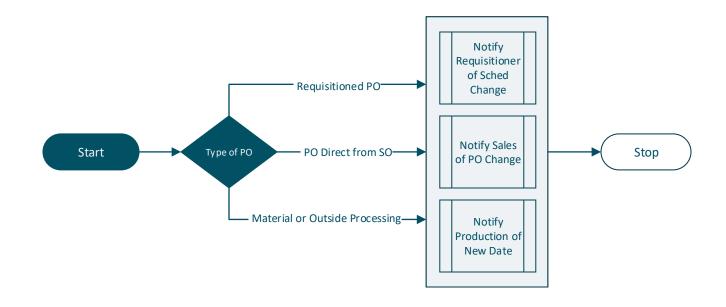


CPICOR

FUNCTION MENU

STAGE: Notify of PO Schedule Change

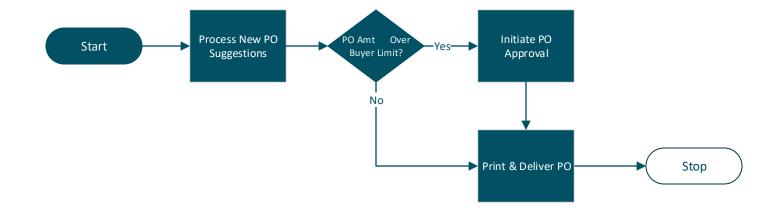
CREATE NOTIFICATION



CPICOR

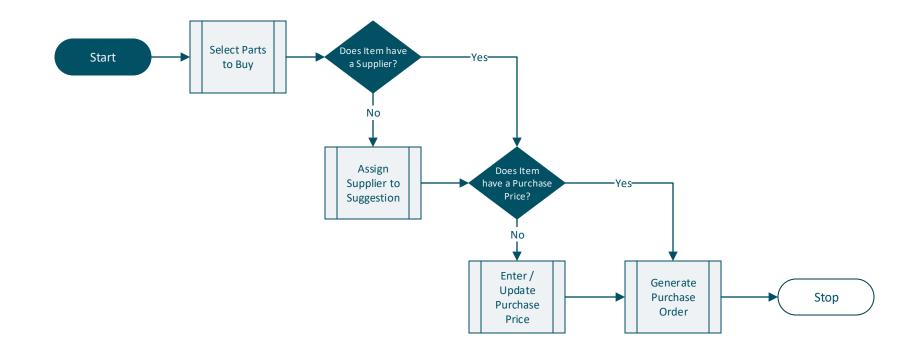
PROCESS: Process Purchasing Suggestions

CREATE NOTIFICATION



STAGE: Process New PO Suggestions

PURCHASE SUGGESTIONS





STAGE: Initiate PO Approval

PURCHASE SUGGESTIONS



STAGE: Print & Deliver PO

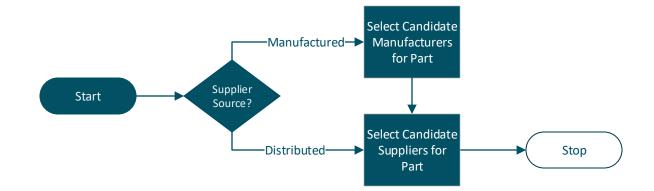
PURCHASE SUGGESTIONS





PROCESS: Supplier Qualification

PURCHASE SUGGESTIONS

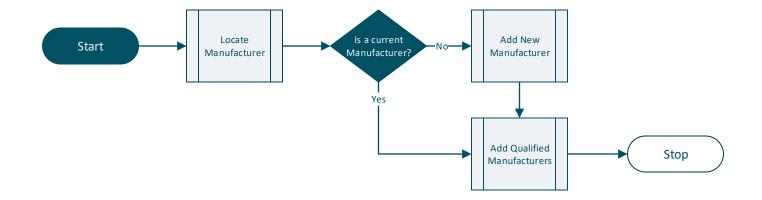


CPICOR

FUNCTION MENU

STAGE: Select Candidate Manufacturers for Part

SUPPLIER QUALIFICATIONS

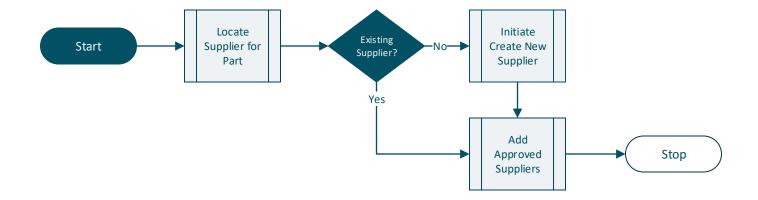


CPICOR

FUNCTION MENU

STAGE: Select Candidate Suppliers for Part

SUPPLIER QUALIFICATIONS





PROCESS: Purchase Requisitions

SUPPLIER QUALIFICATIONS

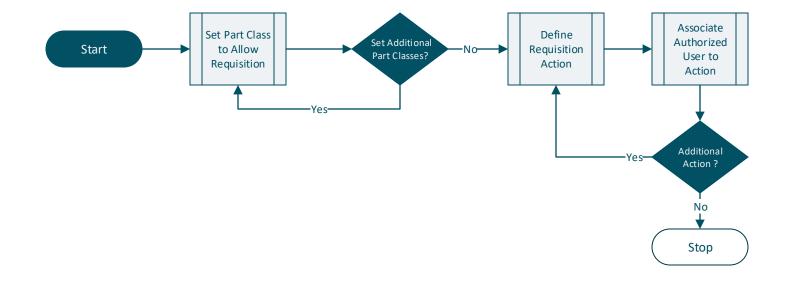
PURCHASING MENU



138

STAGE: One Time Setup

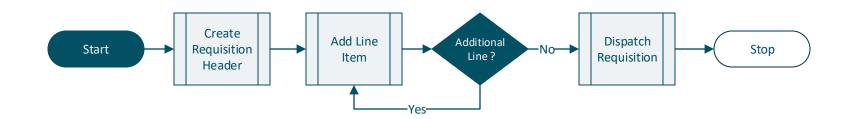
PURCHASE REQUISITIONS





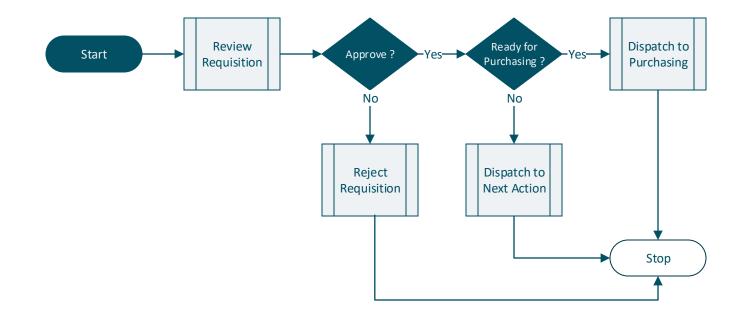
STAGE: Create Requisition

PURCHASE REQUISITIONS



STAGE: Approve Requisition Action

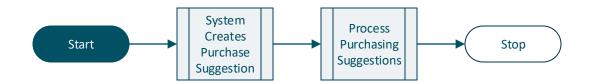
PURCHASE REQUISITIONS



CPICOR

STAGE: Purchasing Buys for Requisition

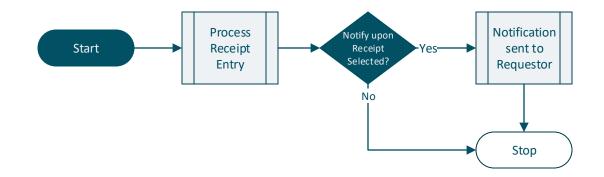
PURCHASE REQUISITIONS



CPICOR

STAGE: Receive Requisition

PURCHASE REQUISITIONS



CPICOR

PURCHASE REQUISITIONS

PURCHASING MENU

FUNCTION MENU

PROCESS: Purchasing Setup





FUNCTION MENU STAGE: Setup Buyer

PURCHASING SETUP

PURCHASING MENU



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

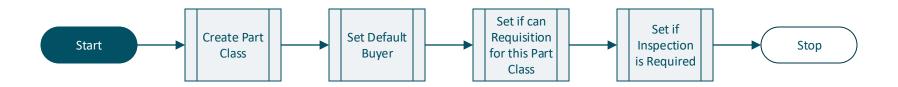
License Requirements:



STAGE: Setup Part Class

PURCHASING SETUP

PURCHASING MENU



- 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:



FUNCTION MENU STAGE: Add Supplier

PURCHASING SETUP





PROCESS: Create New Supplier

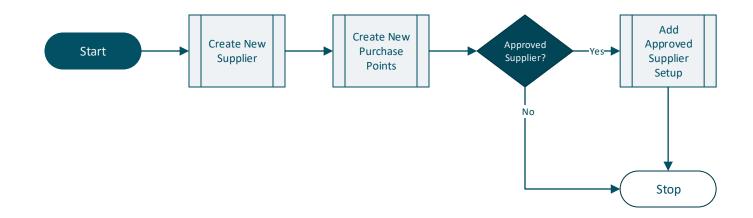
PURCHASING SETUP



CREATE NEW SUPPLIER

PURCHASING MENU

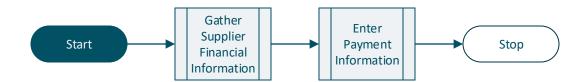
STAGE: Create New Supplier



CREATE NEW SUPPLIER

PURCHASING MENU

STAGE: Finance Setup



STAGE: Quality Review

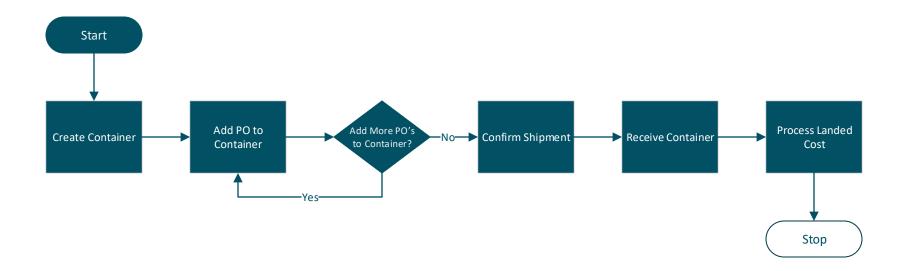
CREATE NEW SUPPLIER





PROCESS: Landed Cost Entry

CREATE NEW SUPPLIER





FUNCTION MENU STAGE: Create Container

LANDED COST ENTRY

PURCHASING MENU

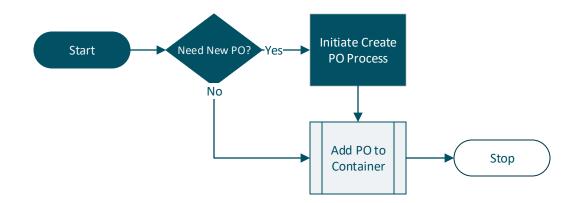


License Requirements:: Landed Cost Management



STAGE: Add PO to Container

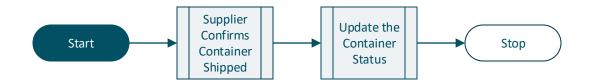
LANDED COST ENTRY





STAGE: Confirm Shipment

LANDED COST ENTRY





STAGE: Receive Container

LANDED COST ENTRY





FUNCTION MENU STAGE: Process Landed Cost

LANDED COST ENTRY



PROCESS: Create Buyer

LANDED COST ENTRY



FUNCTION MENU STAGE: Create User in Epicor

CREATE BUYER



STAGE: Create Buyer

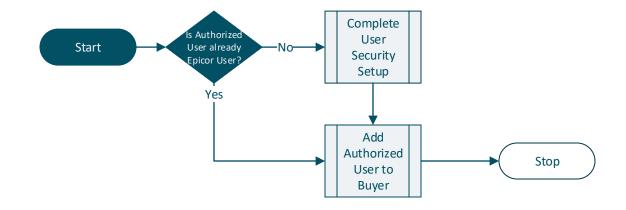
CREATE BUYER





STAGE: Add Authorized Users

CREATE BUYER





FUNCTION MENU PURCHASING

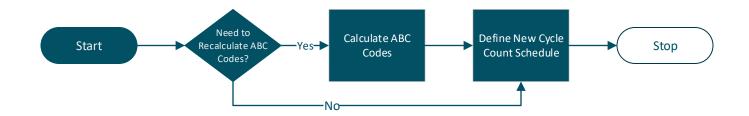
New Cycle Count Schedule Process Physical Counts

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

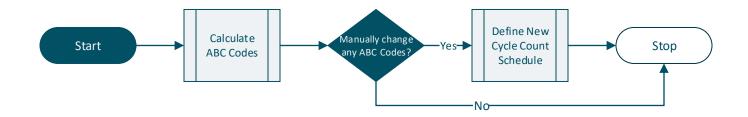
CREATE BUYER





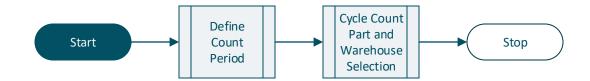
STAGE: Calculate ABC Codes

NEW CC SCHEDULE



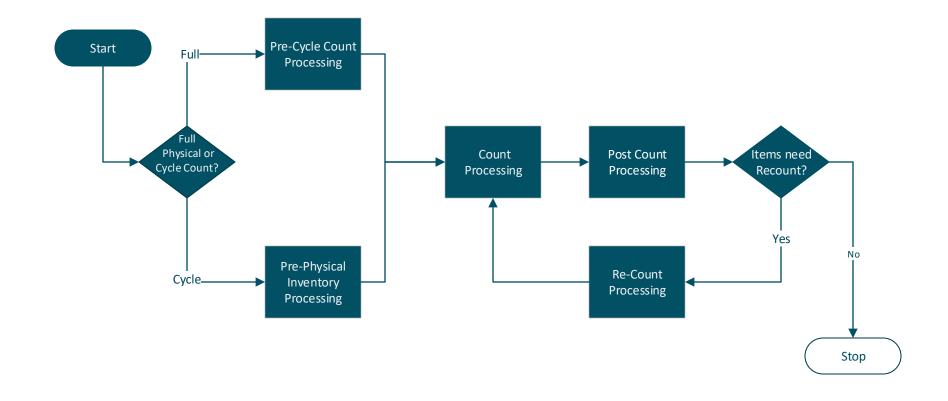
STAGE: Define Cycle Count Schedule

NEW CC SCHEDULE



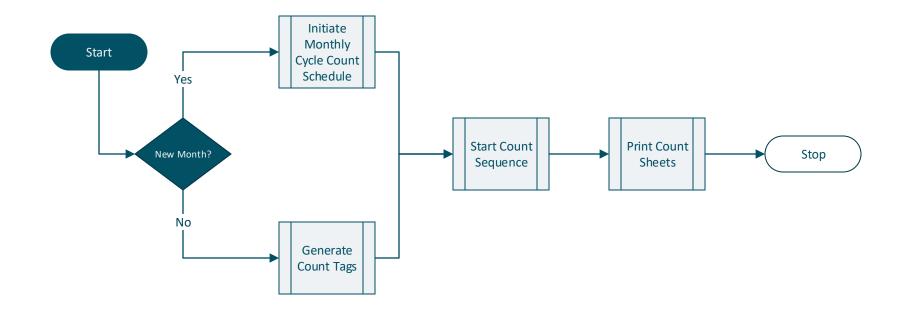
PROCESS: Process Physical Count (Cycle or Full)

NEW CC SCHEDULE



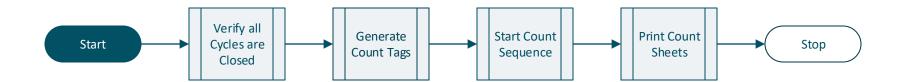
STAGE: Pre-Cycle Count Processing

PROCESS PHYSICAL COUNT



STAGE: Pre-Physical Inventory Processing

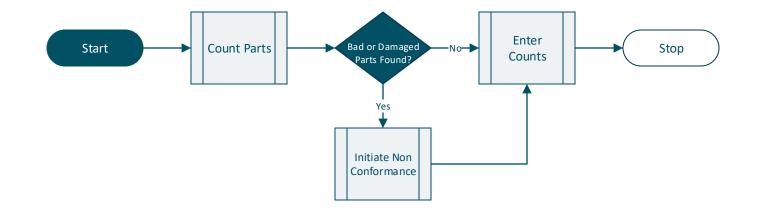
PROCESS PHYSICAL COUNT



CPICOR

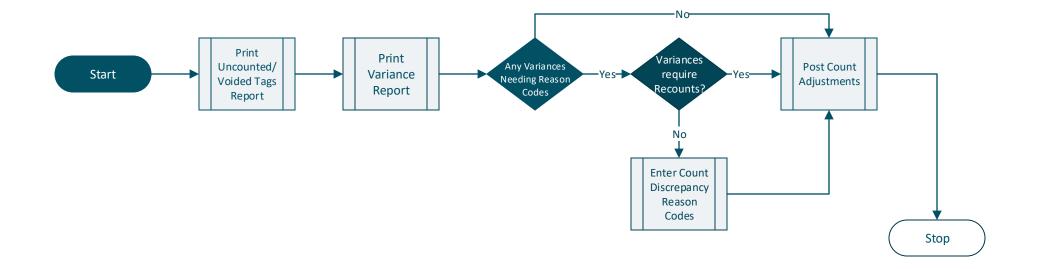
STAGE: Count Processing COUNT

PROCESS PHYSICAL



STAGE: Post-Count Processing

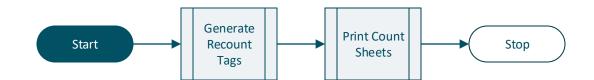
PROCESS PHYSICAL COUNT



CPICOR

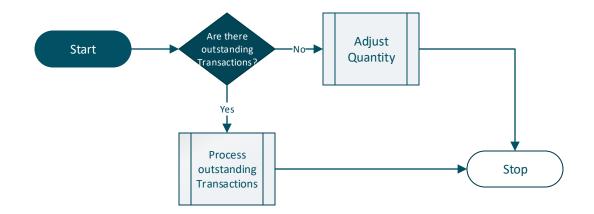
STAGE: Re-Count Processing

PROCESS PHYSICAL COUNT



PROCESS: Quantity Adjustment

PROCESS PHYSICAL COUNT

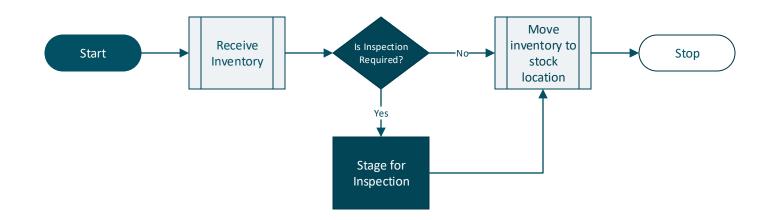


CPICOR

QUANTITY ADJUSTMENT

INVENTORY MENU

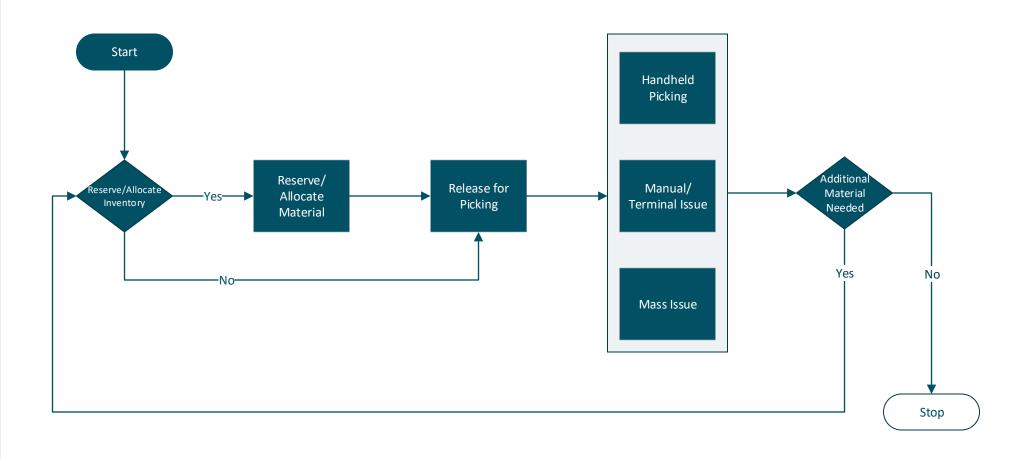
PROCESS: Receive Inventory into Stock



PROCESS: Issue Material to a Job

RECEIVE INVENTORY

INVENTORY MENU



- Inventory Control / Material Handlers

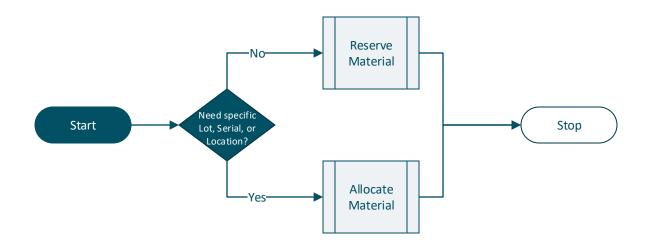
Notes:

-Cannot Mass Issue Serialized Inventory License Requirements:

STAGE: Reserve/Allocate Material

ISSUE MATERIAL TO JOBS

INVENTORY MENU



Role Assignment:

- Inventory Control / Material Handlers

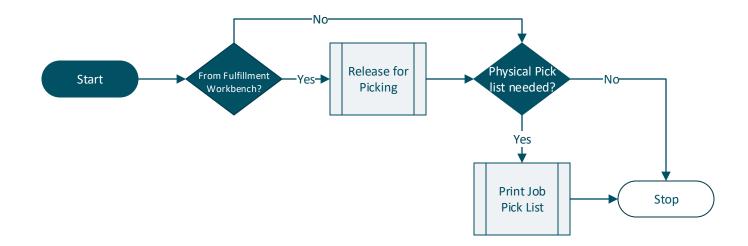
Motos

-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

ISSUE MATERIAL TO
JOBS

INVENTORY MENU



- Inventory Control / Material Handlers

Notes:

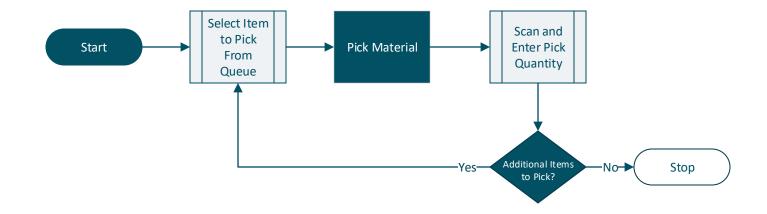
-Can print Pick List when Releasing for Picking

License Requirements:



Stage: Pick with Handheld

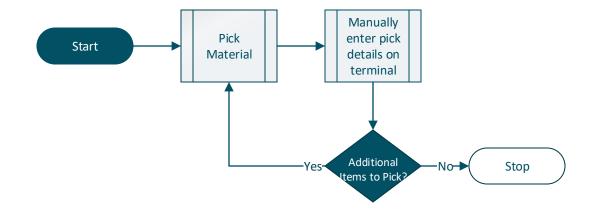
ISSUE MATERIAL TO JOBS





STAGE: Manual Issue

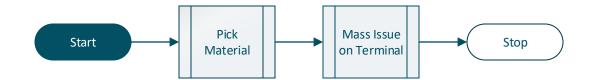
ISSUE MATERIAL TO JOBS





STAGE: Mass Issue

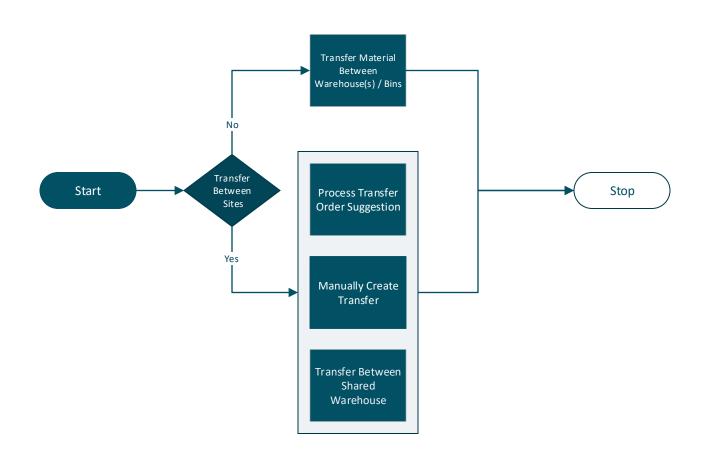
ISSUE MATERIAL TO JOBS



PROCESS: Create Transfer (Within or Across Sites)

ISSUE MATERIAL TO JOBS

INVENTORY MENU



Role Assignment:

- Inventory Control / Material Handlers

- Transfers between Sites require Multi-Site License

License Requirements:

FUNCTION MENU

STAGE: Transfer Material Between Warehouse(s) / Bins

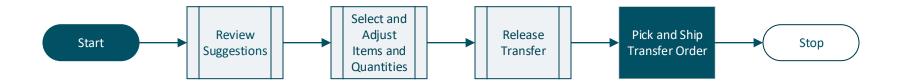
CREATE TRANSFERS



FUNCTION MENU

STAGE: Process Transfer Order Suggestions

CREATE TRANSFERS

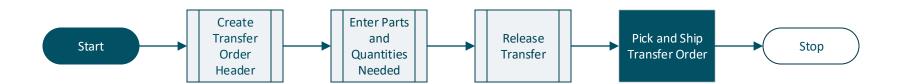


FUNCTION MENU

STAGE: Create Transfer Order Manually

CREATE TRANSFERS

INVENTORY MENU



Role Assignment:

- Inventory Control / Material Handlers

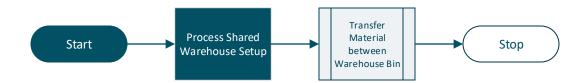
Notes

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

STAGE: Create Transfer Order Manually

CREATE TRANSFERS

INVENTORY MENU



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:

FUNCTION MENU

PROCESS: Setup Warehouse and Bin

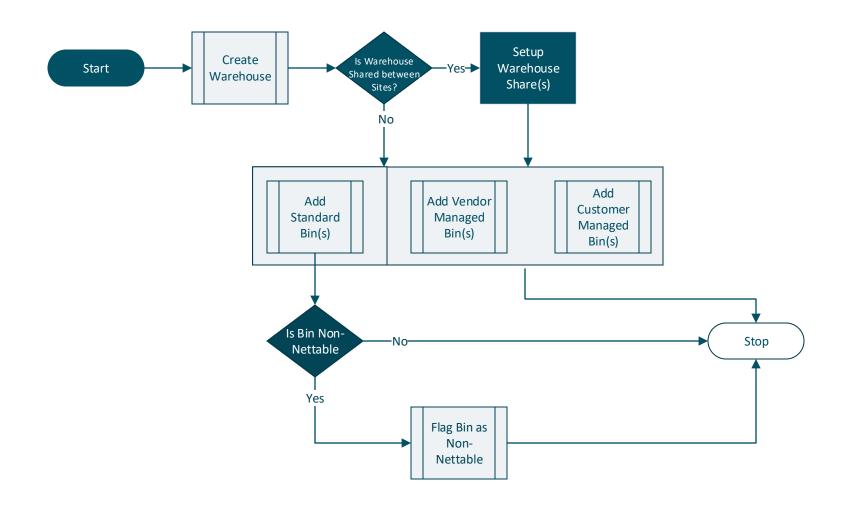
CREATE TRANSFERS



STAGE: Warehouse and Bin Setup

WAREHOUSE & BIN SETUP

INVENTORY MENU



Role Assignment:

- Inventory Control

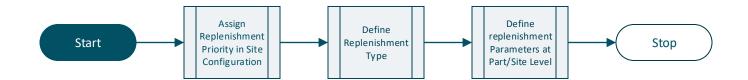
Notes

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

FUNCTION MENU

STAGE: Replenishment Setup

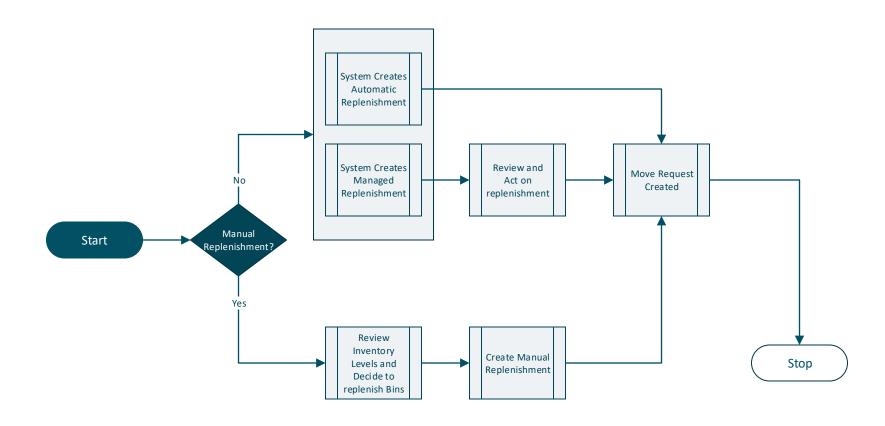
WAREHOUSE & BIN SETUP



STAGE: Process Bin Replenishment

WAREHOUSE & BIN SETUP

INVENTORY MENU



Role Assignment:

- Inventory Control

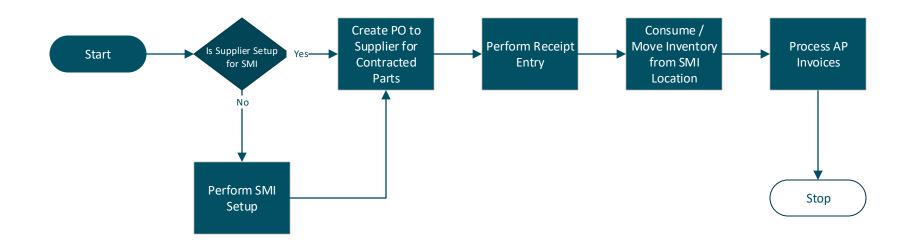
Notes:

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

PROCESS: Supplier Managed Inventory

WAREHOUSE & BIN SETUP

INVENTORY MENU



Role Assignment:

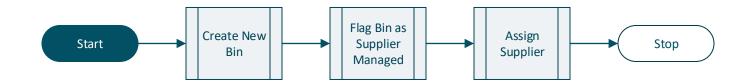
- Inventory Control

Notes

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

FUNCTION MENU STAGE: Supplier SMI Setup

SUPPLIER MANAGED INV



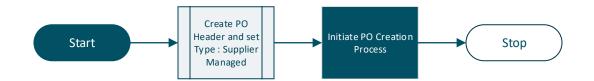
Inventory

CPICOR

FUNCTION MENU

STAGE: Create PO to Supplier for Contracted Parts

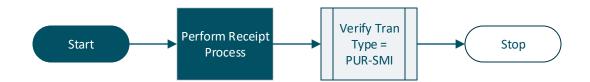
SUPPLIER MANAGED INV



FUNCTION MENU

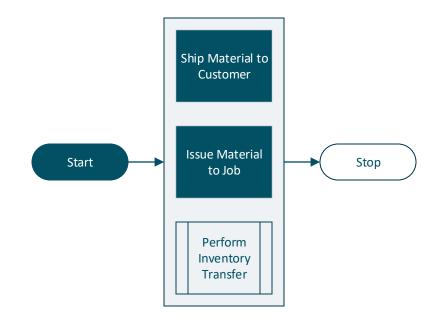
STAGE: Perform Receipt Entry

SUPPLIER MANAGED INV



STAGE: Consume Inventory from SMI Location

SUPPLIER MANAGED INV

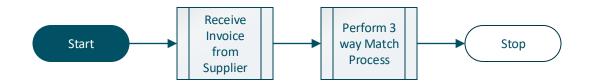


FUNCTION MENU

STAGE: Consume Inventory from SMI Location

SUPPLIER MANAGED INV

INVENTORY MENU



Role Assignment:

- Inventory Control

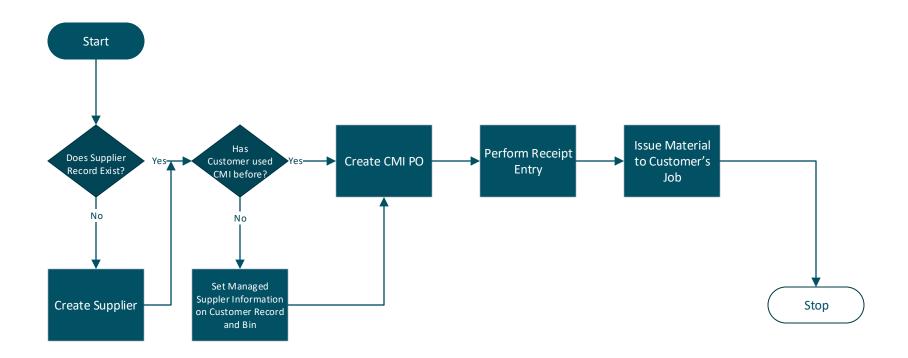
Note:

- 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

SUPPLIER MANAGED INV

INVENTORY MENU



Role Assignment:

- Inventory Control

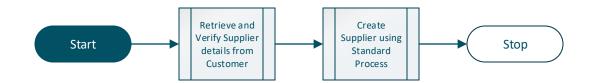
Notes:

- 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

CUSTOMER MANAGED INV

INVENTORY MENU



- Accounts Payable / Sales

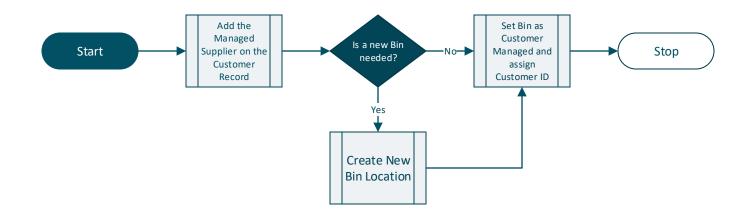
Notes

- 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:



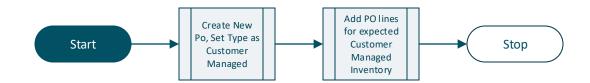
STAGE: Set Managed Supplier and Bin Location for Customer

CUSTOMER MANAGED INV



STAGE: Generate CMI PO

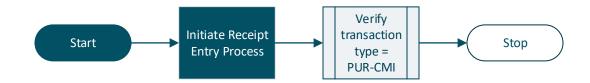
CUSTOMER MANAGED INV



CPICOR

STAGE: Generate CMI PO

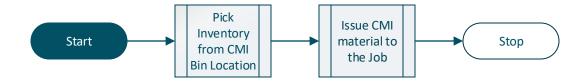
CUSTOMER MANAGED INV



FUNCTION MENU

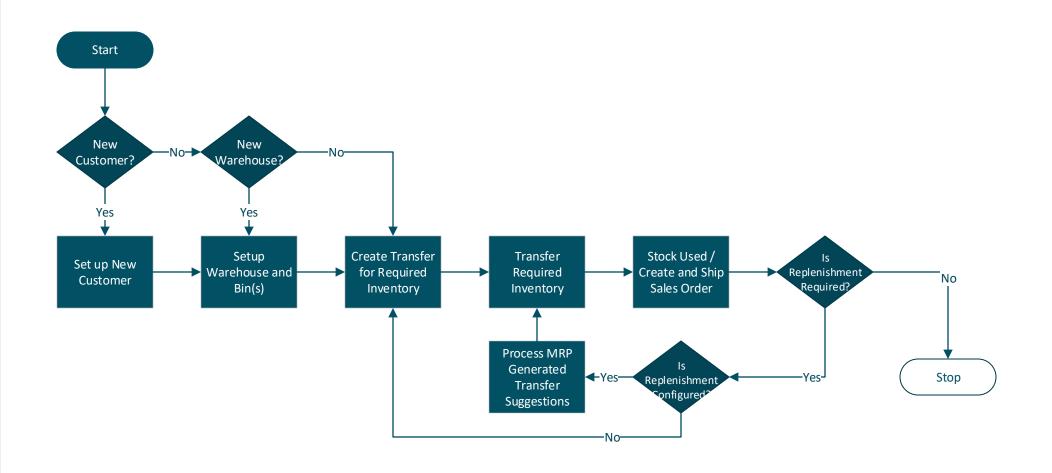
STAGE: Issue Material to the Customers Job

CUSTOMER MANAGED INV



PROCESS: Customer Site Stored Inventory

CUSTOMER MANAGED INV



STAGE: Setup New Customer

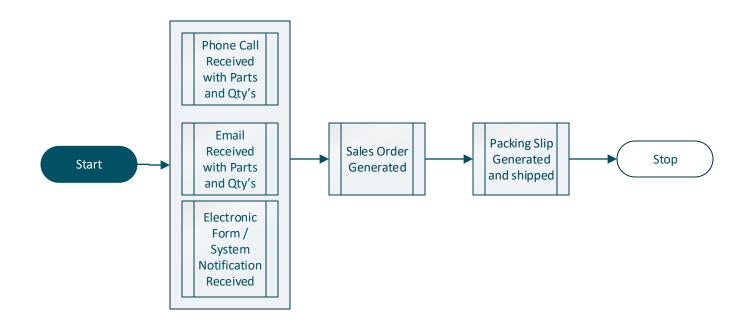
CONSIGNMENT INVENTORY



CONSIGNMENT INVENTORY

INVENTORY MENU

STAGE: Stock Used / Create and Ship Sales Order



Engineering



FUNCTION MENU

INVENTORY MENU

Engineering Change Order (ECO)

Engineer Part

Part Method of Manufacture

Parts MFG Across Sites **Engineer Quote**

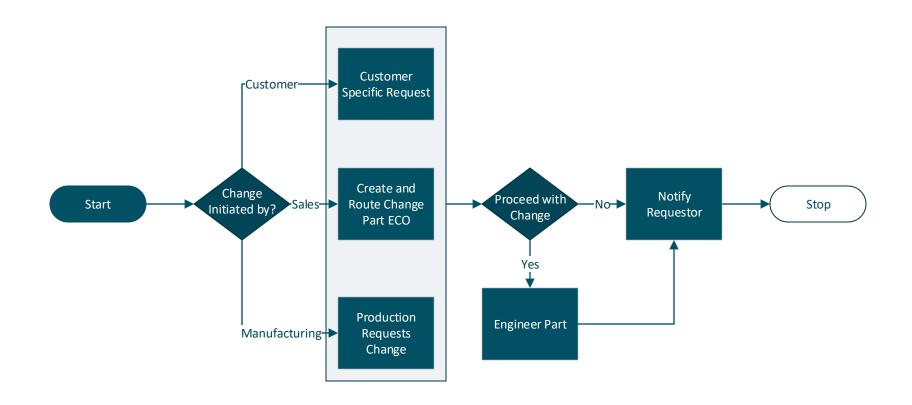
Reference Designators

RoHS Setup

RoHS Compliance

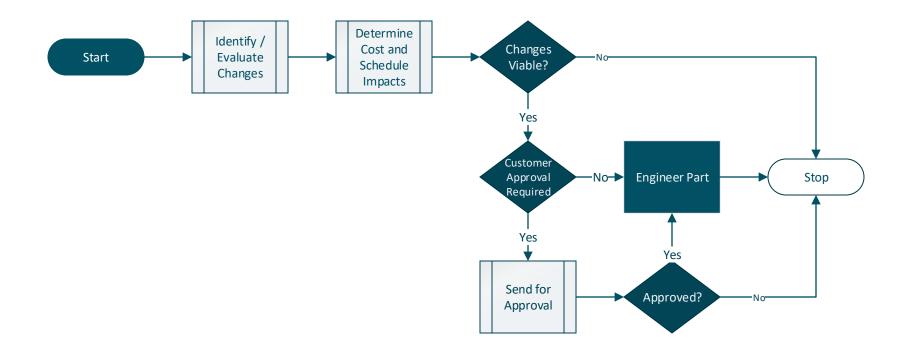
PROCESS: Engineering Change Order

CONSIGNMENT INVENTORY



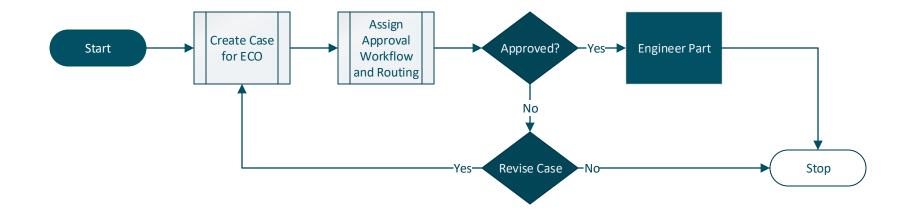
STAGE: Customer Change Request

ENGINEERING CHANGE ORDER



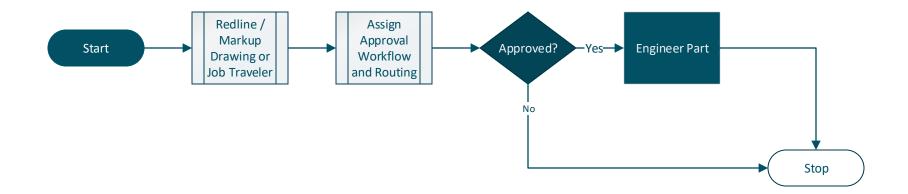
STAGE: Sales Create and Route Change Request

ENGINEERING CHANGE ORDER



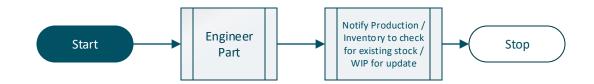
STAGE: Production Initiates Change Request

ENGINEERING CHANGE ORDER



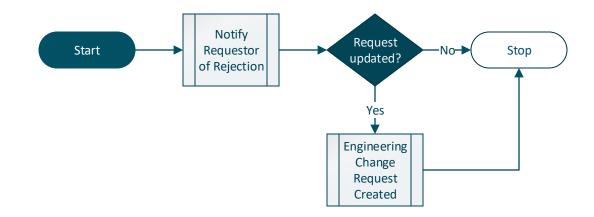
STAGE: Engineer Part

ENGINEERING CHANGE ORDER



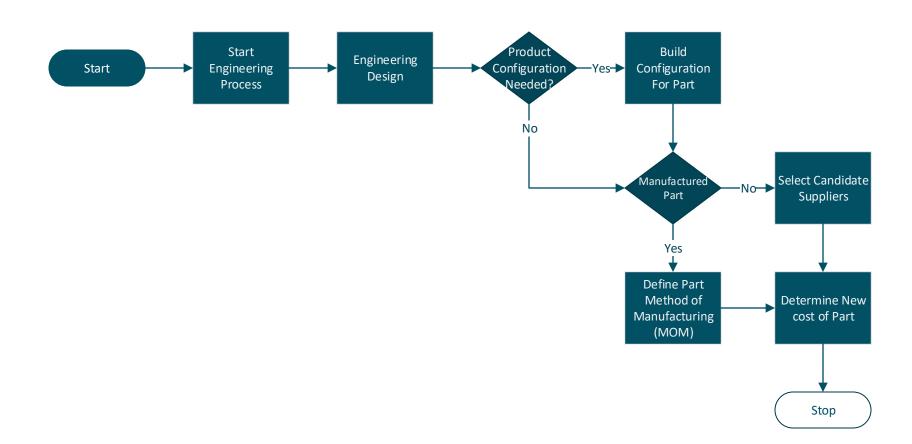
STAGE: Engineer Part

ENGINEERING CHANGE ORDER



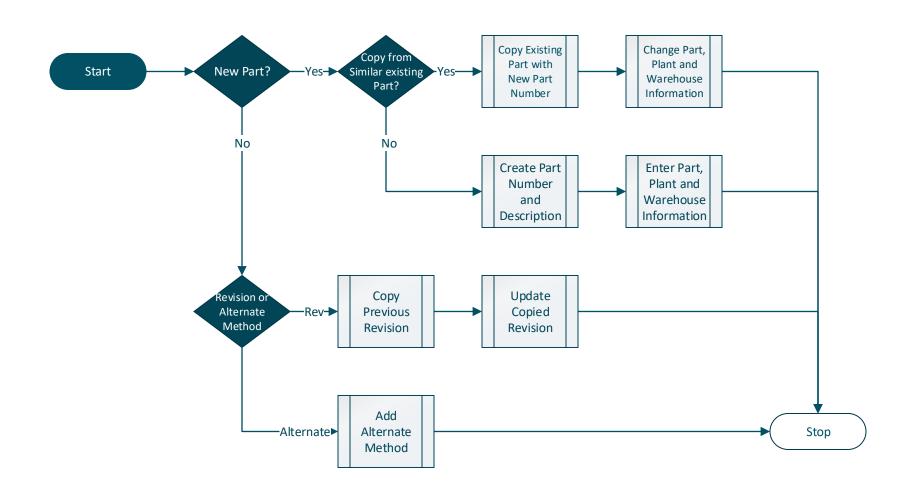
PROCESS: Engineer Part

ENGINEERING CHANGE ORDER



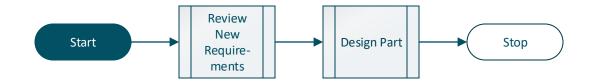
STAGE: Start Engineering Process

ENGINEER PART



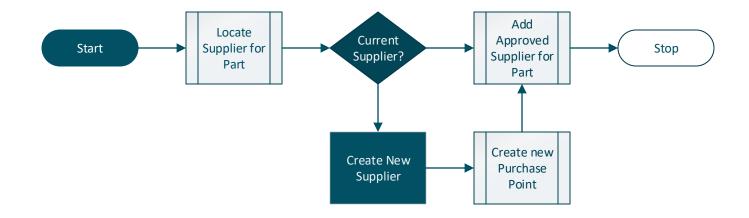
STAGE: Engineering Design

ENGINEER PART



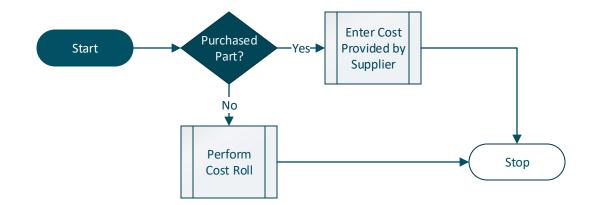
STAGE: Select Candidate Suppliers

ENGINEER PART



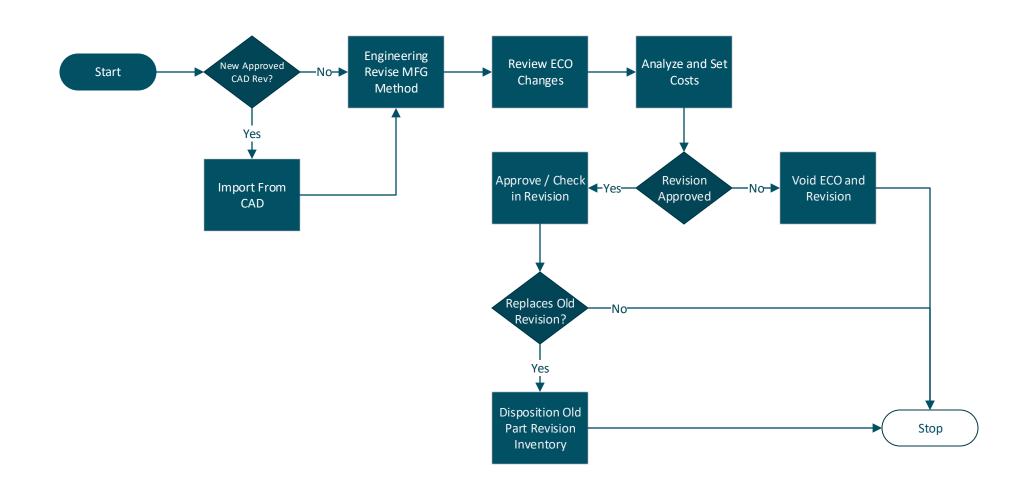
STAGE: Determine New Cost of Part

ENGINEER PART



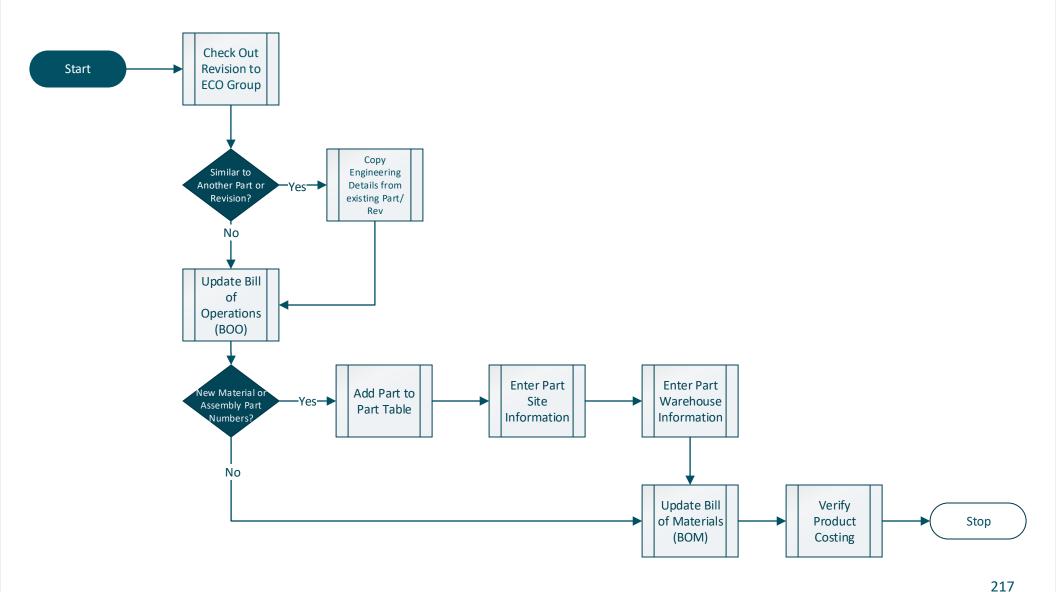
PROCESS: Part Method of Manufacture

ENGINEER PART



STAGE: Engineering Revise Method of Manufacture

METHOD OF MANUFACTURE

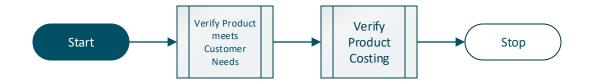


CPICOR

FUNCTION MENU

STAGE: Review ECO Changes

METHOD OF MANUFACTURE



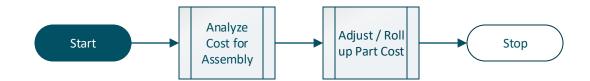
Engineering

FUNCTION MENU

CPICOR

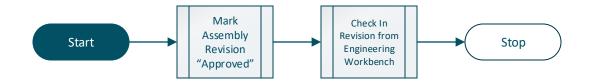
STAGE: Analyze and Set Costs

METHOD OF MANUFACTURE



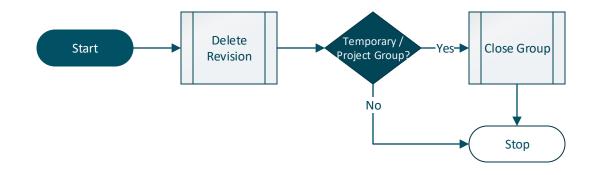
STAGE: Approve New Revision

METHOD OF MANUFACTURE



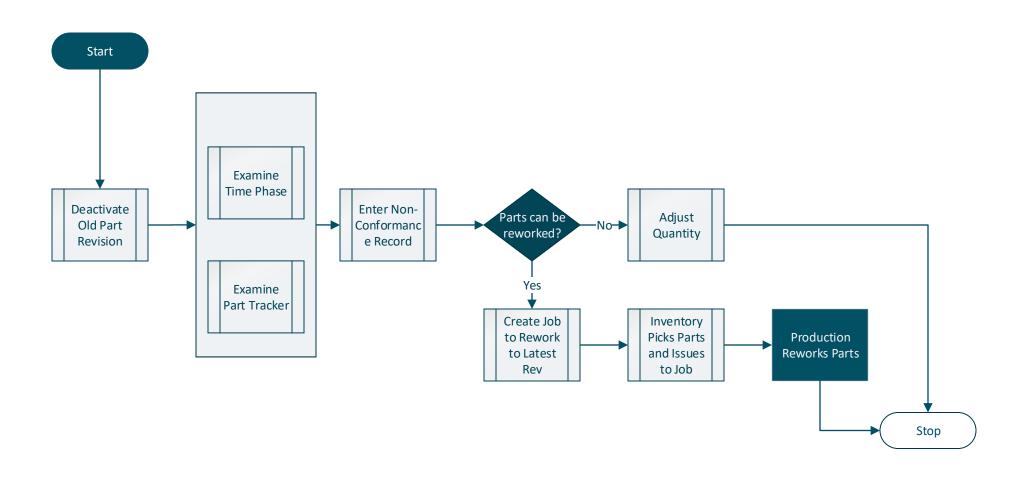
STAGE: Void ECO and Revision

METHOD OF MANUFACTURE



STAGE: Disposition Old Part Revision Inventory

METHOD OF MANUFACTURE



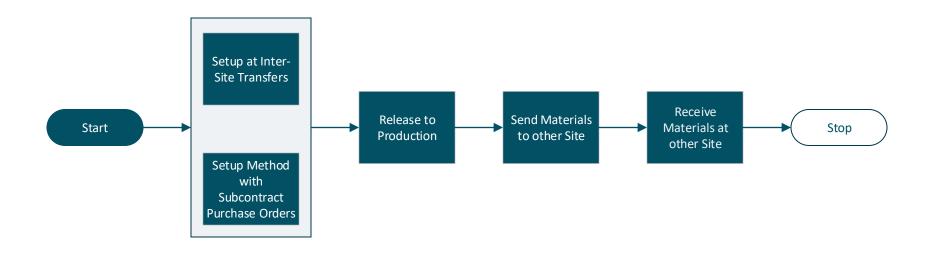
CPICOR

FUNCTION MENU

PROCESS: Parts Manufactured Across Sites

METHOD OF MANUFACTURE

ENGINEERING MENU



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

CPICOR

FUNCTION MENU

STAGE: Setup as Inter-Site Transfers

PARTS MFG ACROSS SITES



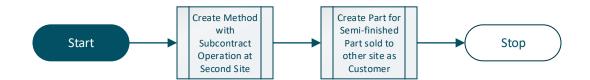
Engineering

CPICOR

FUNCTION MENU

STAGE: Setup Method with Subcontract Purchase Orders

PARTS MFG ACROSS SITES



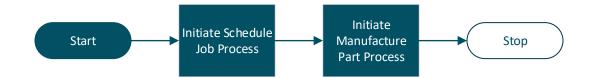
Engineering

FUNCTION MENU

CPICOR

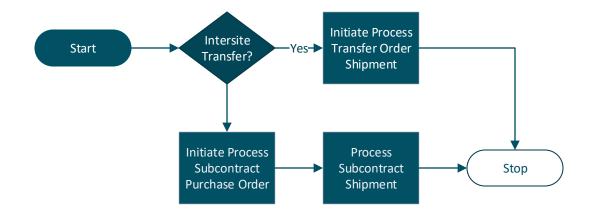
STAGE: Release to Production

PARTS MFG ACROSS SITES



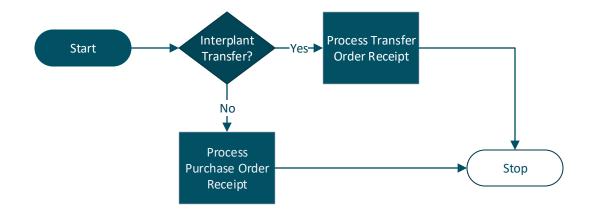
STAGE: Send Materials to other Site

PARTS MFG ACROSS SITES



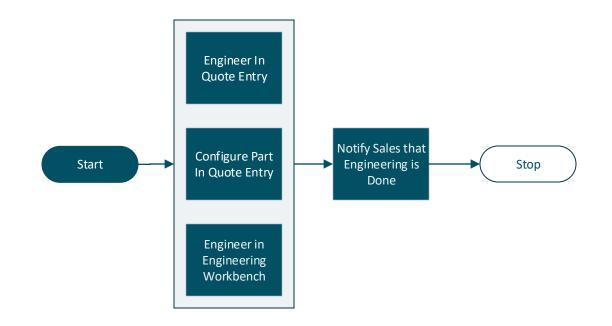
STAGE: Receive Materials from other Site

PARTS MFG ACROSS SITES



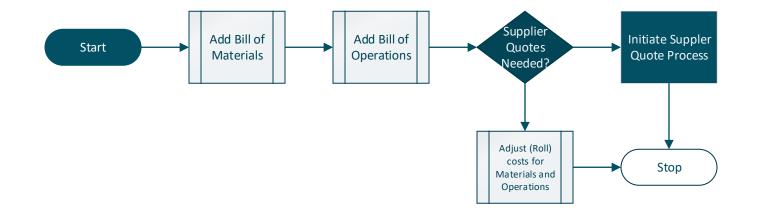
PROCESS: Engineer Quote

PARTS MFG ACROSS SITES



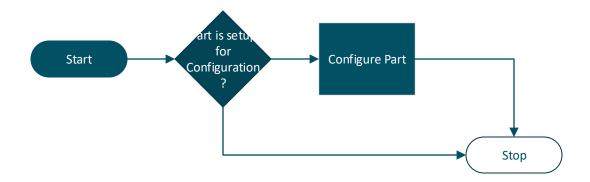
STAGE: Engineer in Quote Entry

ENGINEER QUOTE



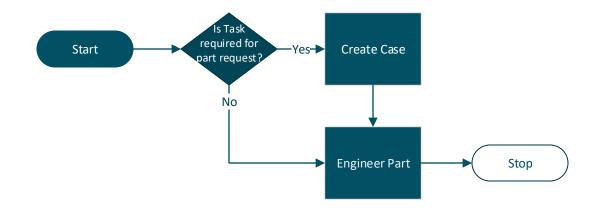
STAGE: Configure in Quote Entry

ENGINEER QUOTE



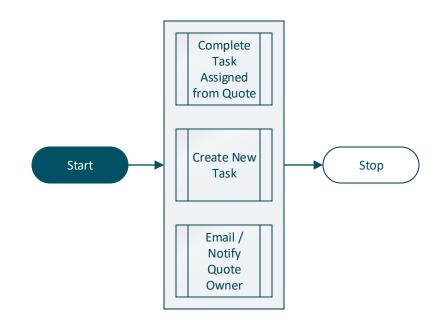
STAGE: Engineer in Engineering Workbench

ENGINEER QUOTE



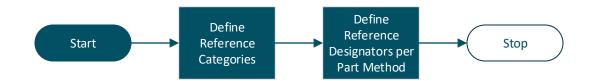
STAGE: Notify Sales that Engineering is Done

ENGINEER QUOTE



PROCESS: Reference Designators

ENGINEER QUOTE



CPICOR

FUNCTION MENU

STAGE: Define Reference Categories

REFERENCE DESIGNATORS



CPICOR

FUNCTION MENU

STAGE: Define Reference Designators per Part Method

REFERENCE DESIGNATORS



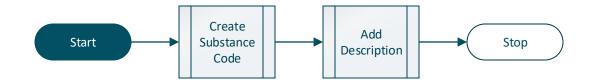
PROCESS: RoHS Setup

REFERENCE DESIGNATORS



STAGE: Define Restricted Substances

Rohs Setup



STAGE: Define Restriction Types

Rohs Setup



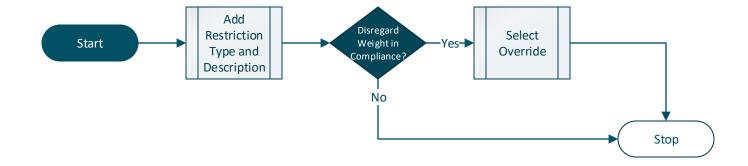
PROCESS: RoHS Compliance

Rohs Setup



STAGE: Add RoHS Restriction under Part Maintenance

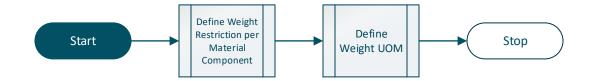
Rohs Compliance





STAGE: Add Restricted Substance Content

Rohs Compliance



STAGE: Run RoHS Compliance Process

Rohs Compliance



Configurator



FUNCTION MENU

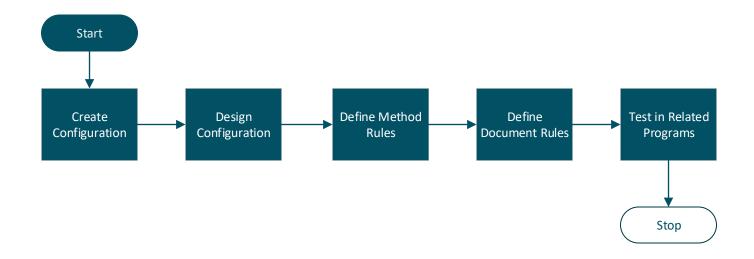
ENGINEERING MENU

Create Configuration

Configure Part

PROCESS: Create Configuration

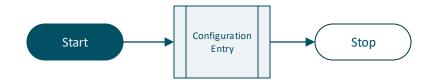
Rohs Compliance



CPICOR

STAGE: Create Configuration

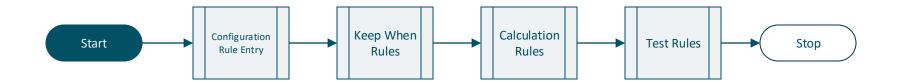
CREATE CONFIGURATION



CPICOR

STAGE: Define Method Rules

CREATE CONFIGURATION



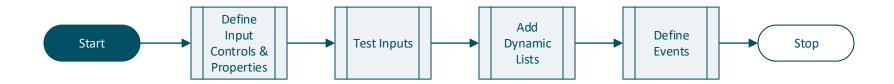
Configurator

CPICOR

CREATE CONFIGURATION

CONFIGURATOR MENU

FUNCTION MENU



STAGE: Design Configuration

CPICOR

STAGE: Define Document Rules

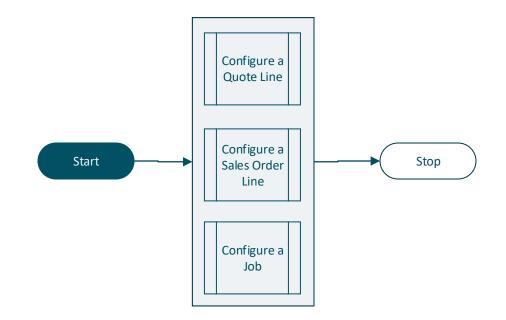
CREATE CONFIGURATION





STAGE: Test in Related Programs

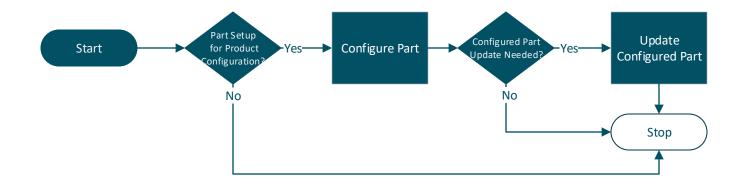
CREATE CONFIGURATION





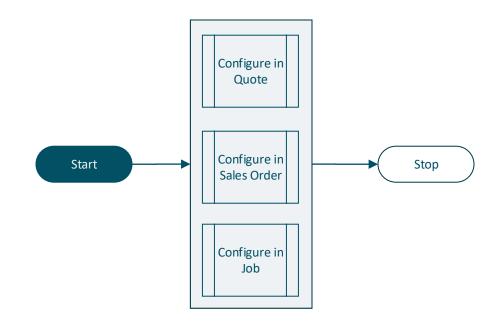
PROCESS: Configure Part

CREATE CONFIGURATION



STAGE: Configure Part

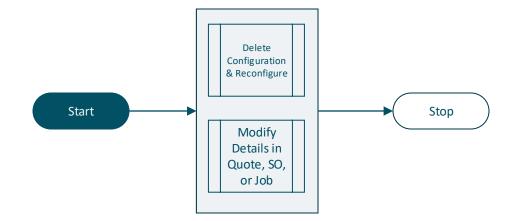
CONFIGURE PART



STAGE: Update Configured Part

CONFIGURE PART

CONFIGURATOR MENU



Planning

CPICOR

FUNCTION MENU

CONFIGURATOR MENU

MRP Overview Forecast Creation

Process MRP Suggestions

Production Demand to Close

Create Job



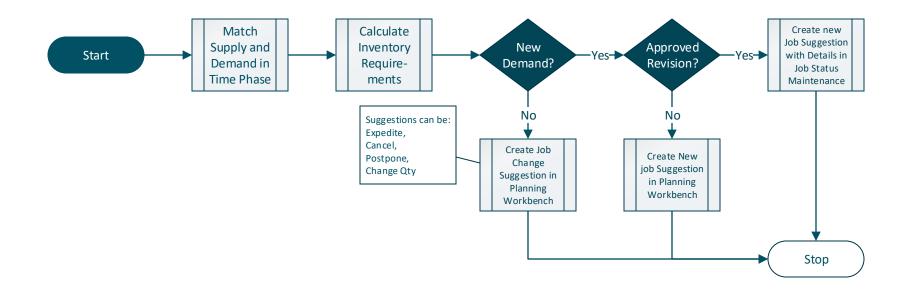
PROCESS: MRP Overview

CONFIGURE PART



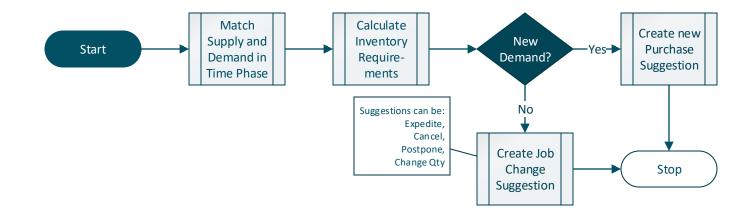
STAGE: Calculate Manufacturing Requirements

MRP



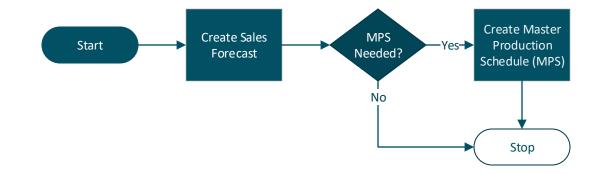
STAGE: Calculate Purchasing Requirements

MRP



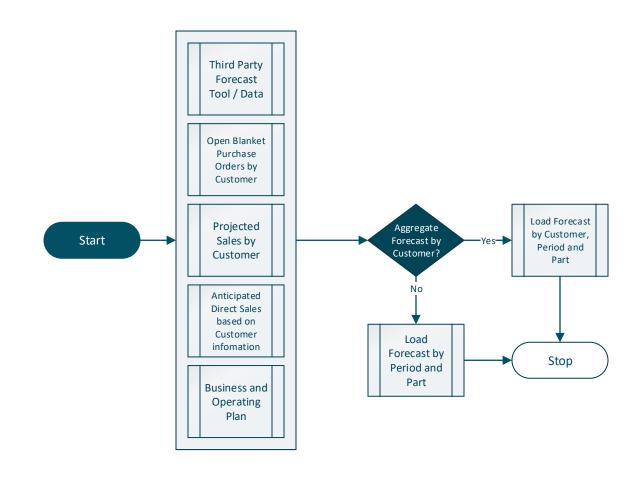
FUNCTION MENU PROCESS: Forecast Creation

MRP



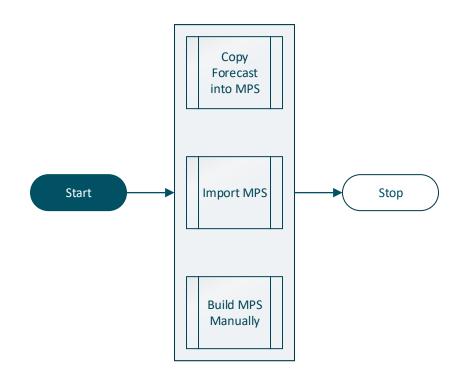
STAGE: Create Sales Forecast

FORECAST CREATION



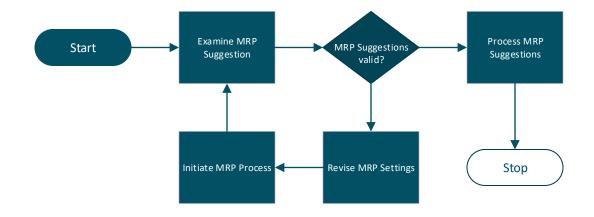
STAGE: Create Master Production Schedule (MPS)

FORECAST CREATION



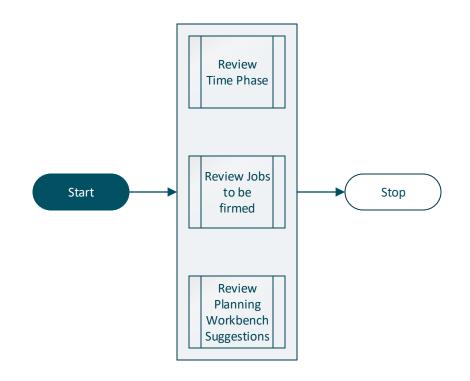
PROCESS: Process MRP Suggestions

FORECAST CREATION



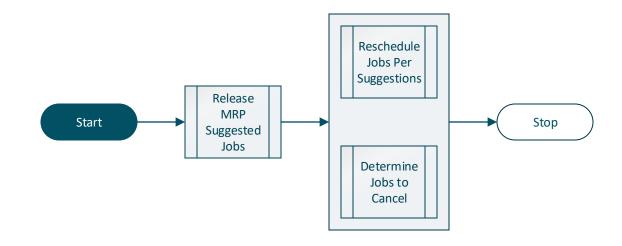
STAGE: Examine MRP Suggestions

PROCESS MRP SUGGESTION



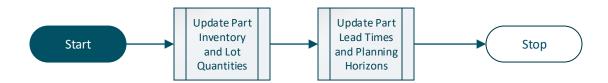
STAGE: Respond to Suggestions

PROCESS MRP SUGGESTION



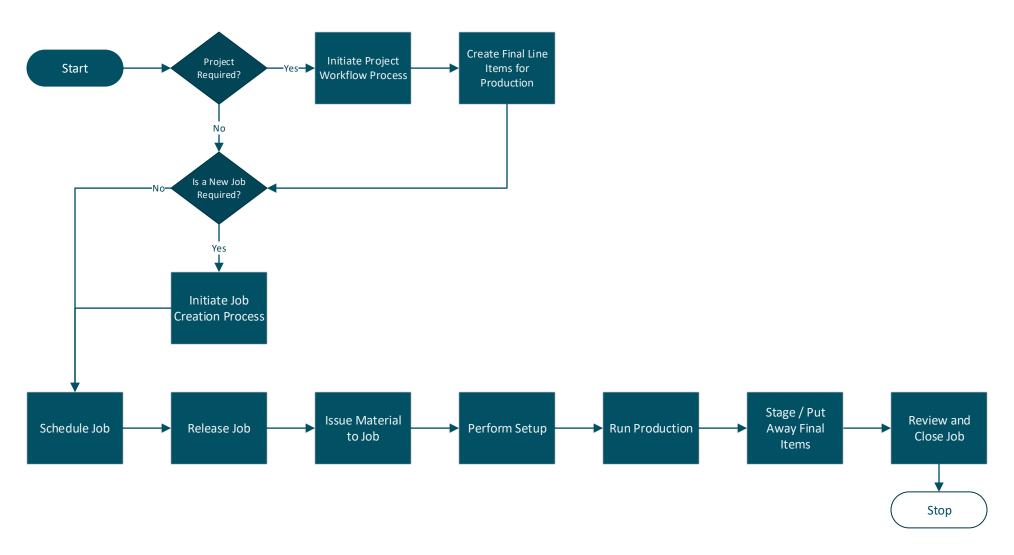
STAGE: Revise MRP Settings

PROCESS MRP SUGGESTION



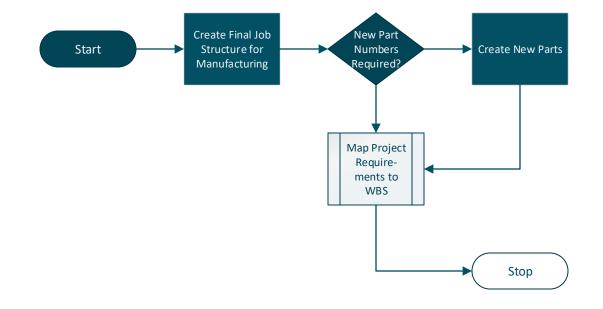
PROCESS: Production Demand to Close

PROCESS MRP SUGGESTION



STAGE: Create Final Line Items for Final Production

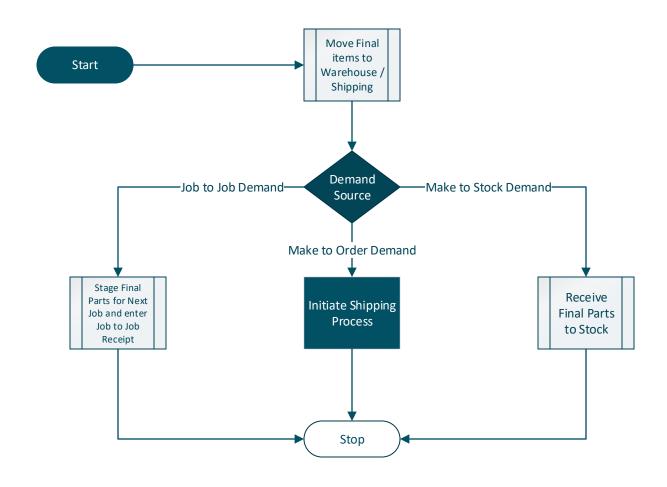
PRODUCTION DEMAND



PRODUCTION DEMAND

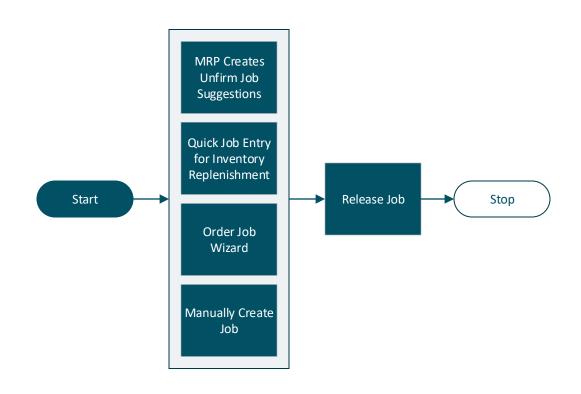
PLANNING MENU

STAGE: Stage / Put Away Final Items



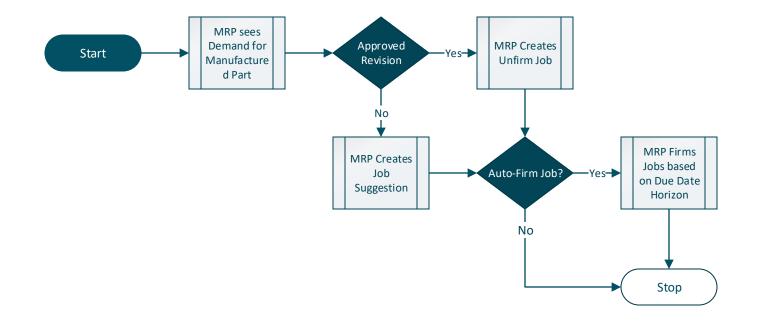
PROCESS: Create Job

PRODUCTION DEMAND



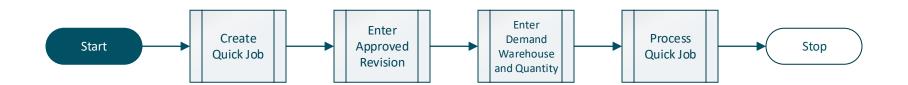
STAGE: MRP Creates Unfirm Job Suggestions

CREATE JOB



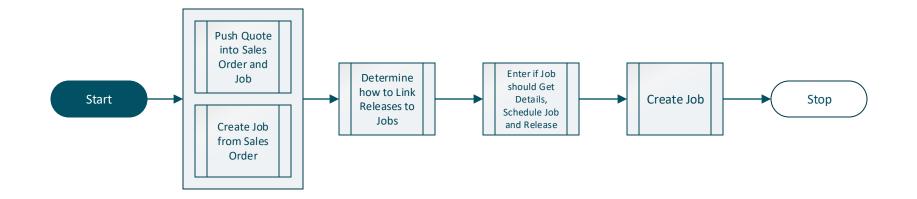
STAGE: Quick Job Entry for Inventory Replenishment

CREATE JOB



STAGE: Order Job Wizard

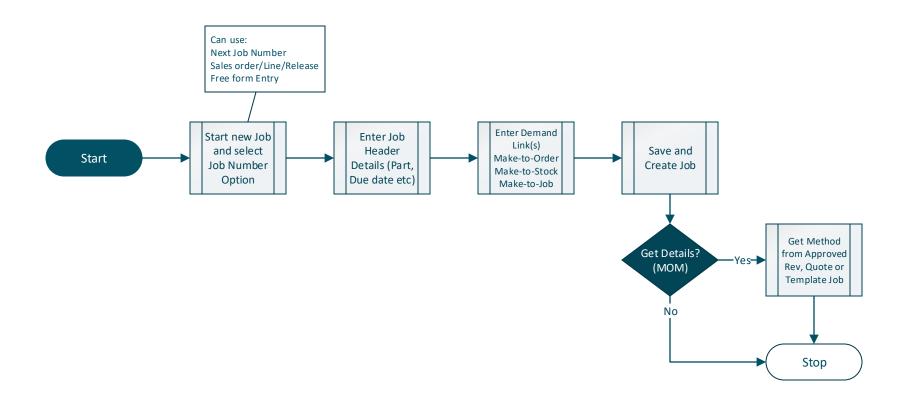
CREATE JOB





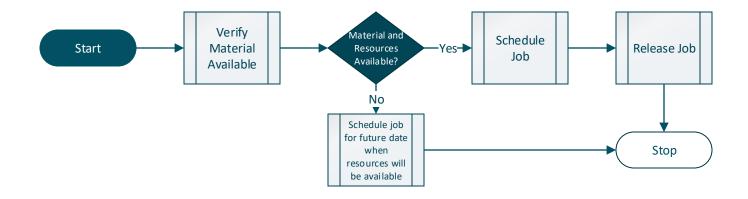
STAGE: Order Job Wizard

CREATE JOB



STAGE: Release Job

CREATE JOB





FUNCTION MENU

PLANNING MENU

AEP Quote and Estimate Entry Prepare Estimate Detail

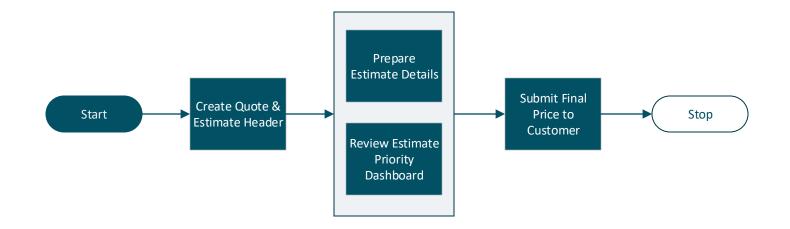
Convert Quote to Job



FUNCTION MENU

PROCESS: AEP Quote & Estimate Entry

CREATE JOB

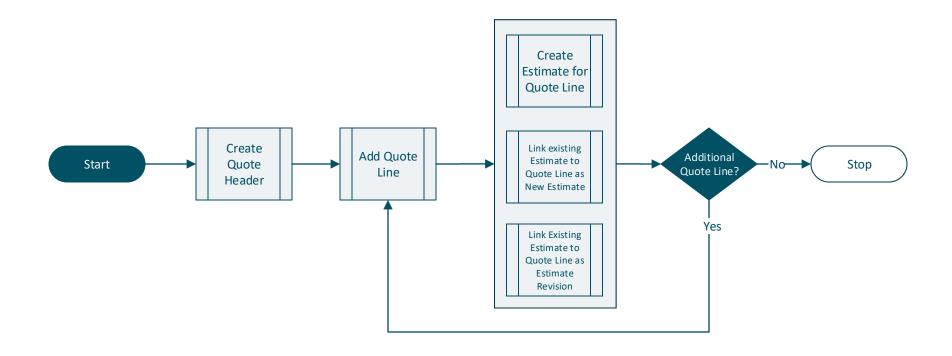




FUNCTION MENU

STAGE: Create Quote & Estimate

QUOTE AND ESTIMATE ENTRY





FUNCTION MENU

STAGE: Prepare Estimate Details

QUOTE AND ESTIMATE ENTRY

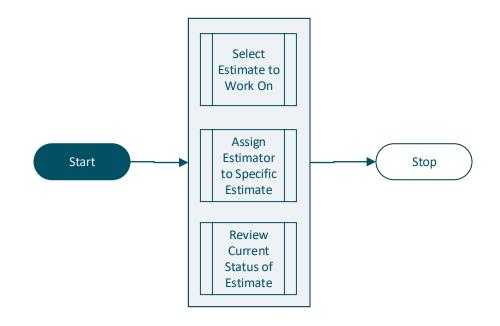




FUNCTION MENU

STAGE: Review Estimate Priority Dashboard

QUOTE AND ESTIMATE ENTRY

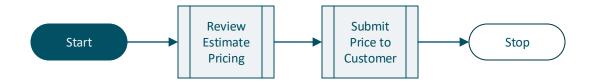




FUNCTION MENU

STAGE: Submit Final Price to Customer

QUOTE AND ESTIMATE ENTRY





QUOTE AND ESTIMATE ENTRY

ADV ESTIMATING PLANNING MENU

FUNCTION MENU

PROCESS: Prepare Estimate Detail

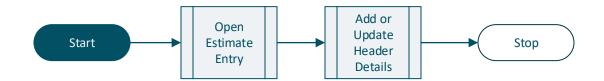




FUNCTION MENU

STAGE: Prepare Estimate Header

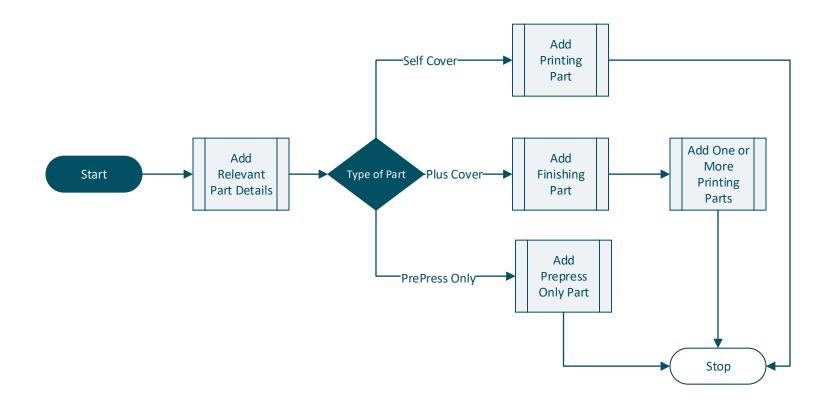
PREPARE ESTIMATE





FUNCTION MENU STAGE: Add Part Details

PREPARE ESTIMATE



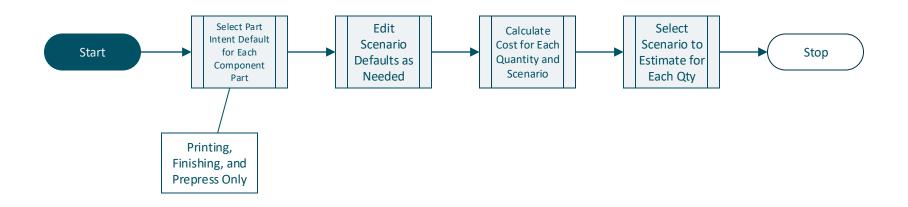


FUNCTION MENU

STAGE: Select Scenario for each Quote Quantity

PREPARE ESTIMATE

ADV ESTIMATING PLANNING MENU



Role Assignment:

- Estimating

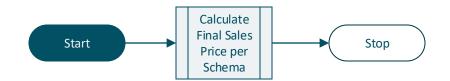
Note: Part Intent Defaults include details such as size, paper stock, inks and bind options: Scenario Defaults include the various Press, plating and binding equipment options Final Selection allows estimator to Quote a short run on Digital Press, medium run on sheetfed and long run on web press



FUNCTION MENU

STAGE: Determine Final Sales Price

PREPARE ESTIMATE





FUNCTION MENU

STAGE: Update Opportunity / Quote



ADV ESTIMATING PLANNING MENU



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:



FUNCTION MENU

PROCESS: Convert Quote with Estimate to Job

PREPARE ESTIMATE





FUNCTION MENU

STAGE: Create Sales Order from Quote

CONVERT QUOTE





FUNCTION MENU

STAGE: Create Job and Planning from Quote and Estimate Details

CONVERT QUOTE



Advanced Estimating and Planning

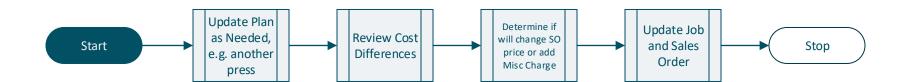


FUNCTION MENU

STAGE: Modify Plan as Needed

CONVERT QUOTE

ADV ESTIMATING PLANNING MENU



Manufacturing



FUNCTION MENU

ADV ESTIMATING PLANNING MENU

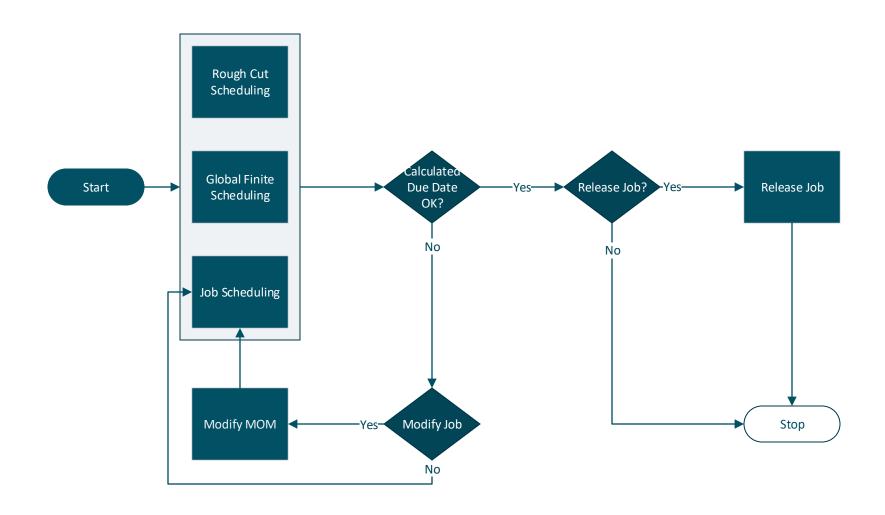
Job Scheduling Manufacture Part MES Clock In and Job Activity

Manual Time Entry Operations First Article Inspection

RMA Rework Request Non Conformance Entry

PROCESS: Job Scheduling

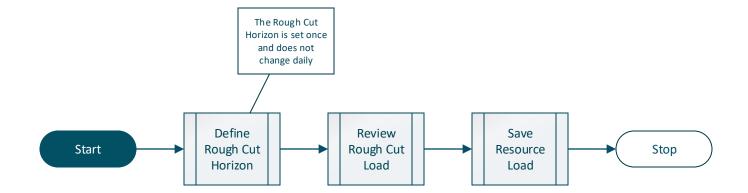
CONVERT QUOTE



STAGE: Rough Cut Scheduling

JOB SCHEDULING

MANUFACTURING MENU



Role Assignment:

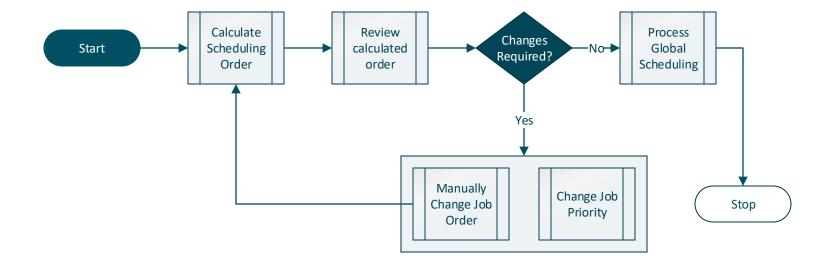
- Production Planner

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:

STAGE: Global Finite Scheduling

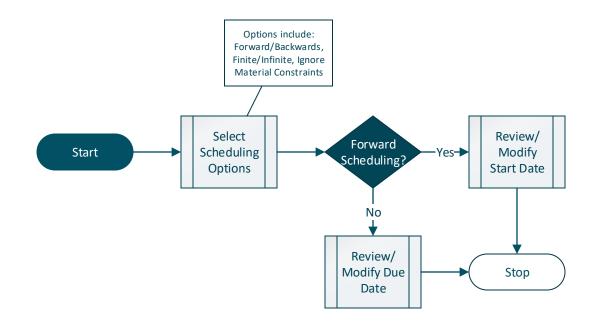
JOB SCHEDULING





STAGE: Job Scheduling

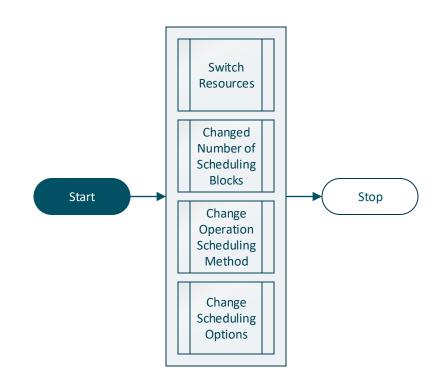
JOB SCHEDULING





STAGE: Modify MOM

JOB SCHEDULING





STAGE: Release Job

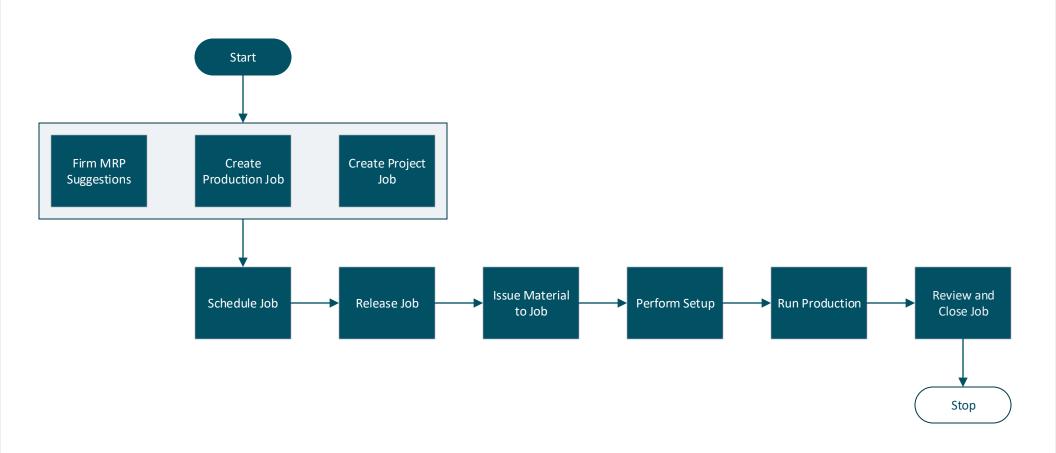
JOB SCHEDULING



CPICOR

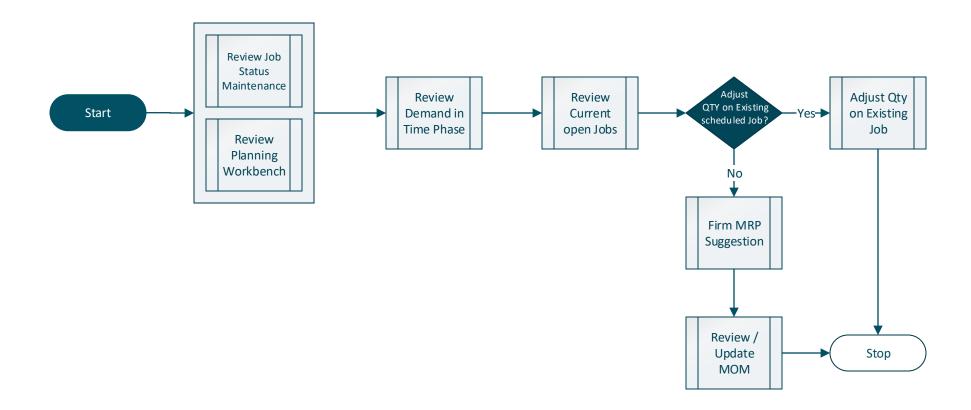
PROCESS: Manufacture Part

JOB SCHEDULING



STAGE: Firm MRP Suggestion

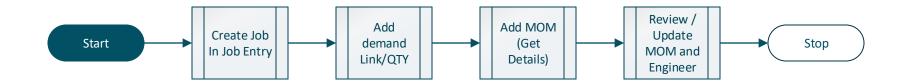
MANUFACTURE PART





STAGE: Create Production Job

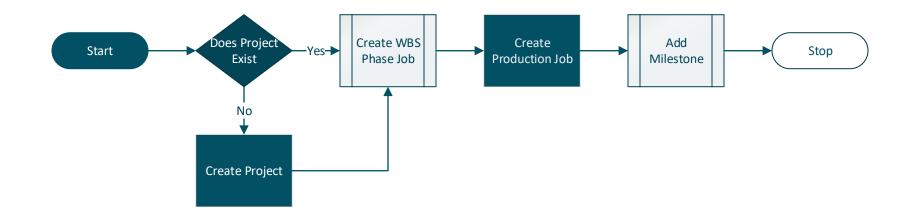
MANUFACTURE PART



CPICOR

STAGE: Create Project Job

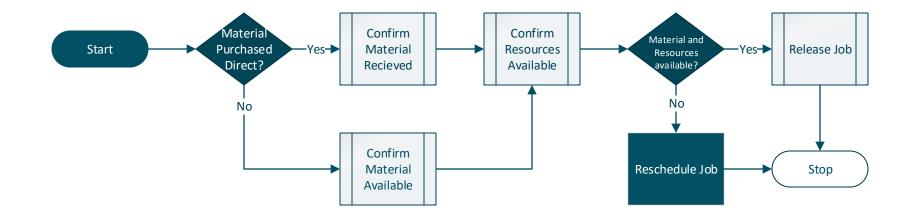
MANUFACTURE PART





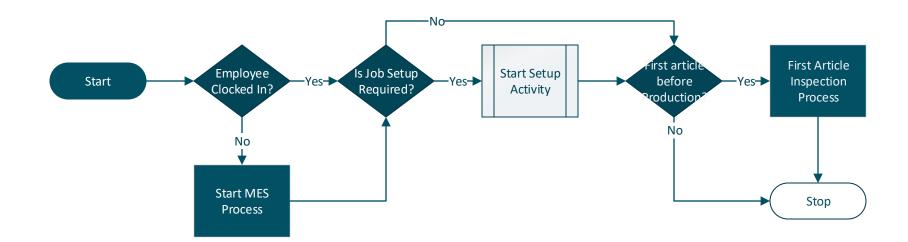
STAGE: Release Job

MANUFACTURE PART



STAGE: Perform Setup

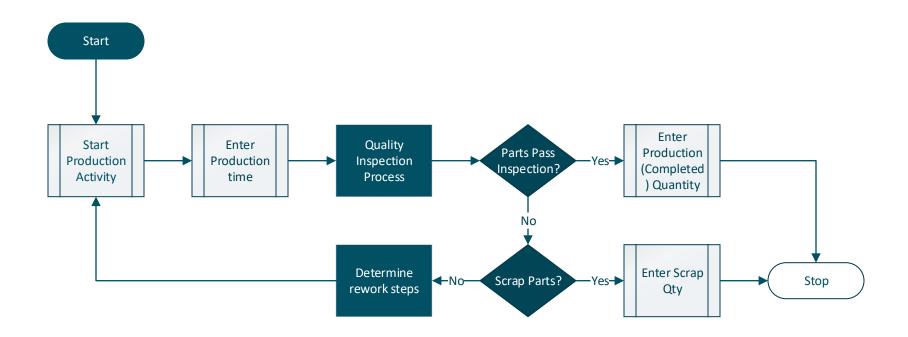
MANUFACTURE PART





STAGE: Run Production

MANUFACTURE PART



Manufacturing

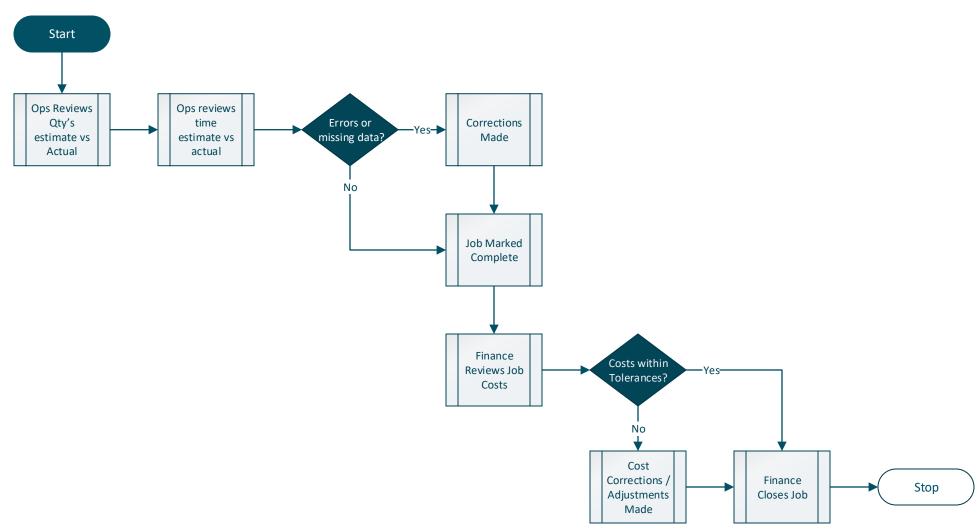
FUNCTION MENU



STAGE: Review and Close Job

MANUFACTURE PART

MANUFACTURING MENU



- Production Supervisor / Finance License Requirements:

CPICOR

FUNCTION MENU PROCESS: Clock In and Job Activity

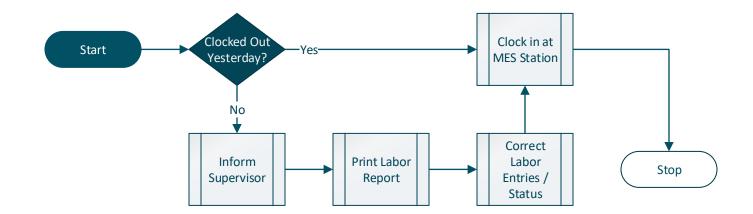
MANUFACTURE PART





STAGE: Clock In

CLOCK IN AND JOB ACTIVITY



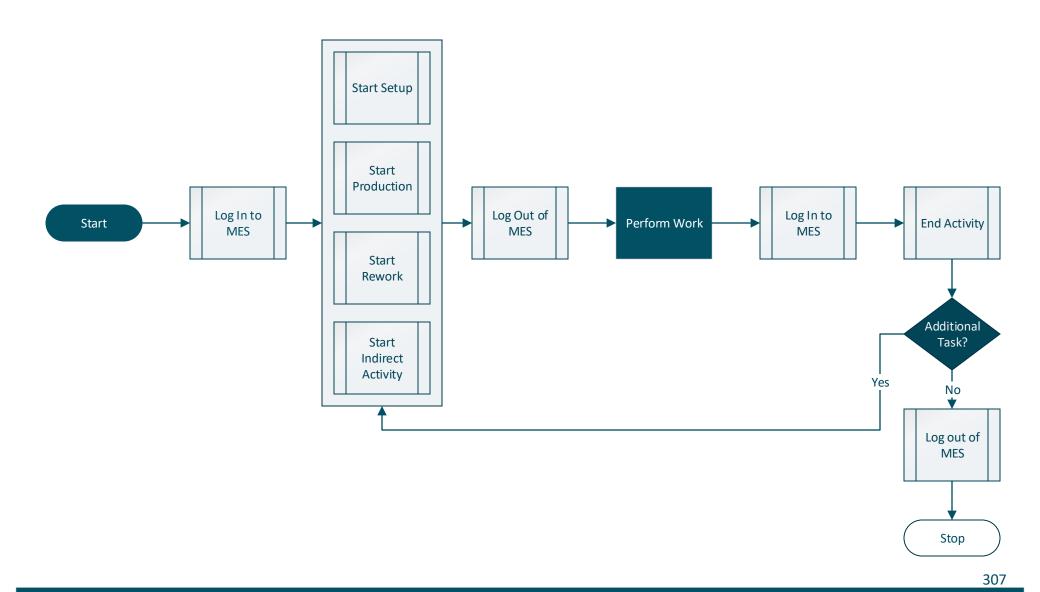
Manufacturing

CPICOR

CLOCK IN AND JOB ACTIVITY MANUFACTURING MENU

FUNCTION MENU

STAGE: Perform Daily Activities

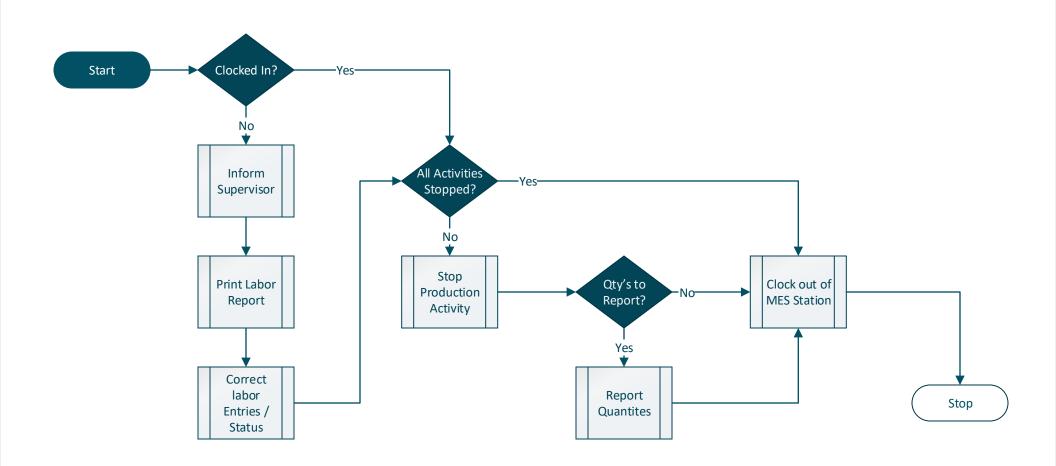


- Production Operator
License Requirements:



STAGE: Clock Out

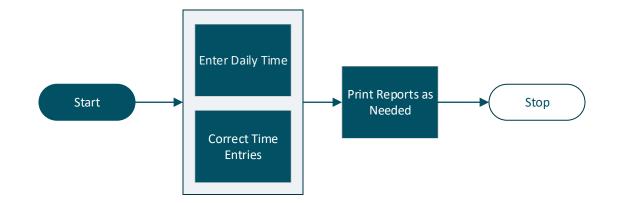
CLOCK IN AND JOB ACTIVITY





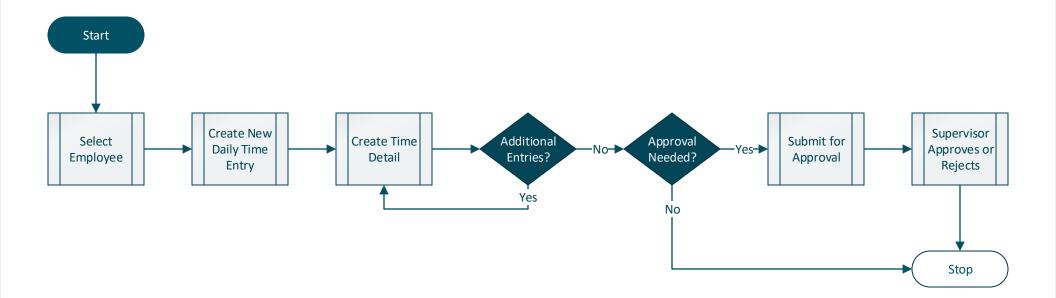
PROCESS: Manual Time Entry

CLOCK IN AND JOB ACTIVITY



FUNCTION MENU STAGE: Enter Daily Time

MANUAL TIME ENTRY

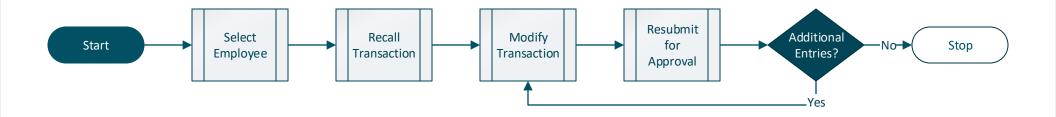


CPICOR

FUNCTION MENU

STAGE: Correct Time Entries

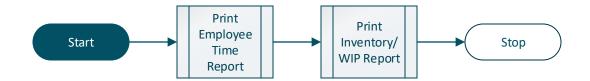
MANUAL TIME ENTRY





STAGE: Print Reports as Needed

MANUAL TIME ENTRY





PROCESS: Operation First Article Inspection

MANUAL TIME ENTRY



CPICOR

STAGE: Setup Job Operation for First Article

FIRST ARTICLE INSPECTION



FIRST ARTICLE INSPECTION

MANUFACTURING MENU

STAGE: Setup Job Operation for First Article



PROCESS: RMA Rework Request

FIRST ARTICLE INSPECTION



REQUEST

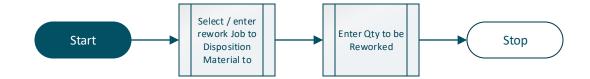
STAGE: Create Job to Rework Material





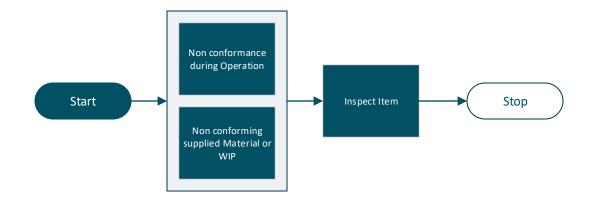
STAGE: Create Job to Rework Material





PROCESS: Nonconformance Entry

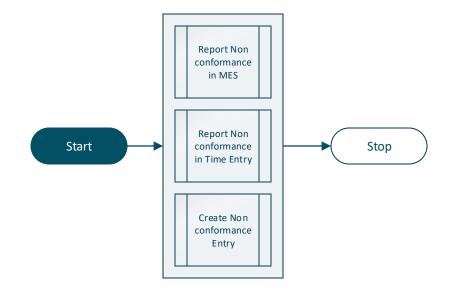






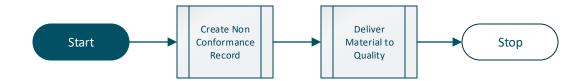
STAGE: Nonconformance During Production





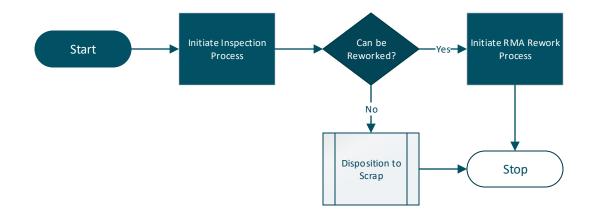
STAGE: Nonconforming Supplier Material or WIP





STAGE: Inspect Item





Quality Assurance



MANUFACTURING FUNCTION MENU

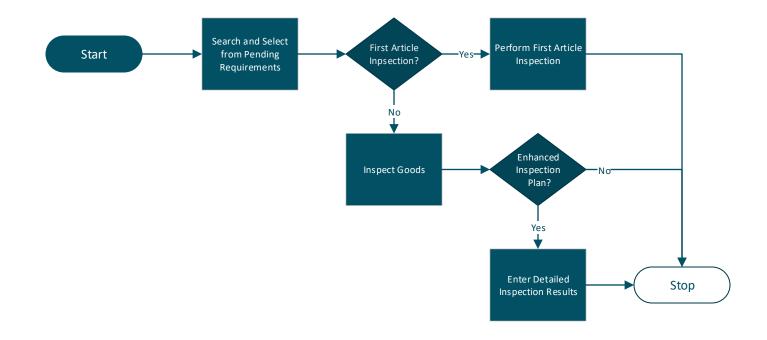
Inspection Processing

Process
Discrepant
Material
Request (DMR)

Corrective Action

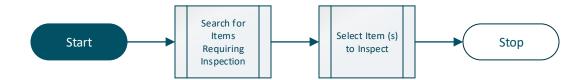
Supplier Review by Quality

PROCESS: Inspection Processing

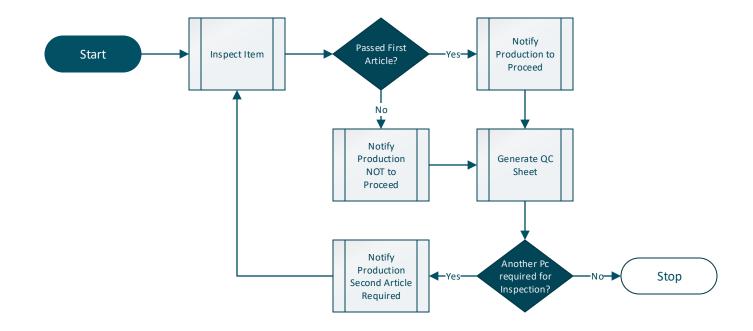


STAGE: Search and Select from Pending Requirements

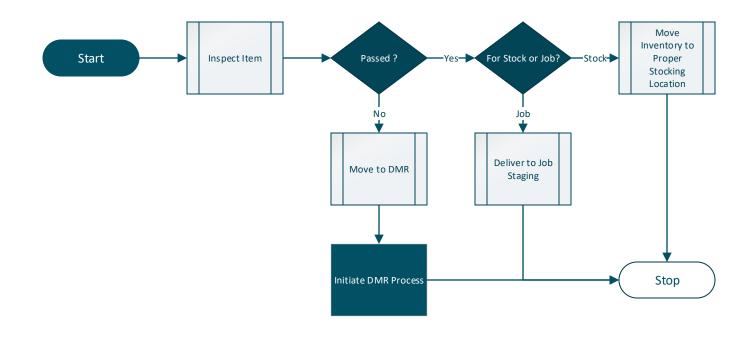




STAGE: Search and Select from Pending Requirements



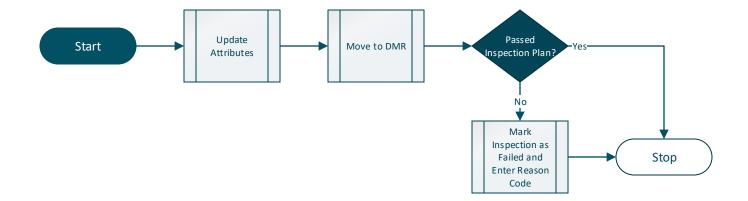
STAGE: Inspect Goods





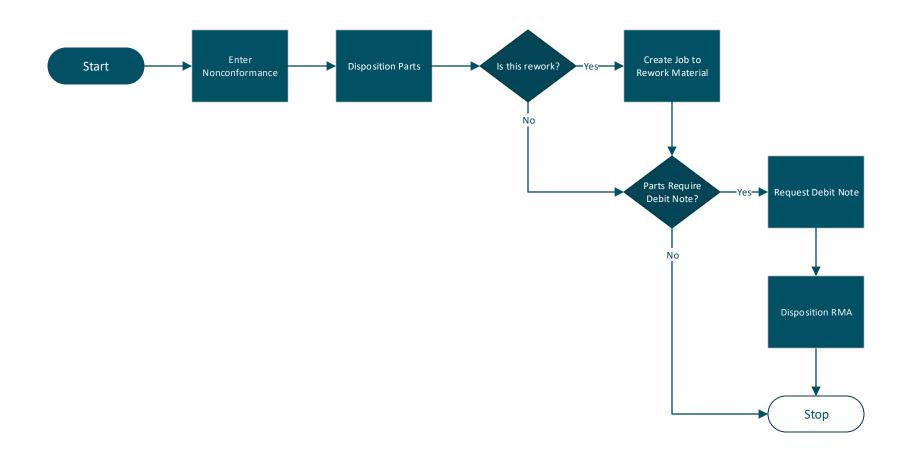
STAGE: Enter Detailed Inspection Results



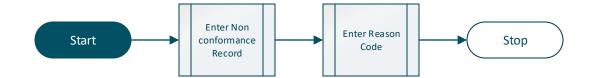


PROCESS: Process Discrepant Material Request (DMR)

INSPECTION PROCESSING QUALITY MENU FUNCTION MENU



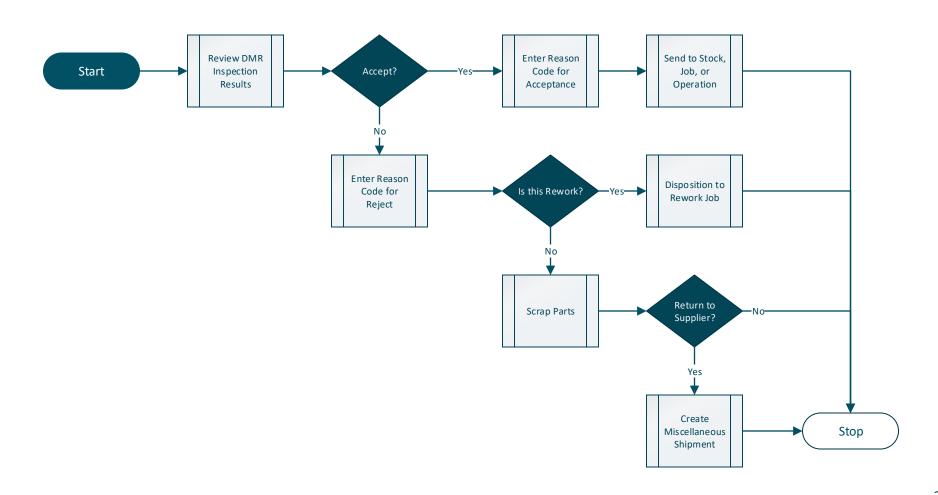
STAGE: Enter Non-Conformance



STAGE: Disposition Parts

PROCESS DMR QUALITY MENU FUNCTION MENU





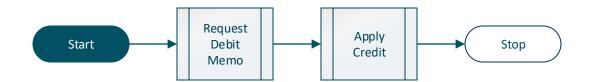
STAGE: Create Job to Rework Material

PROCESS DMR



STAGE: Request Debit Memo

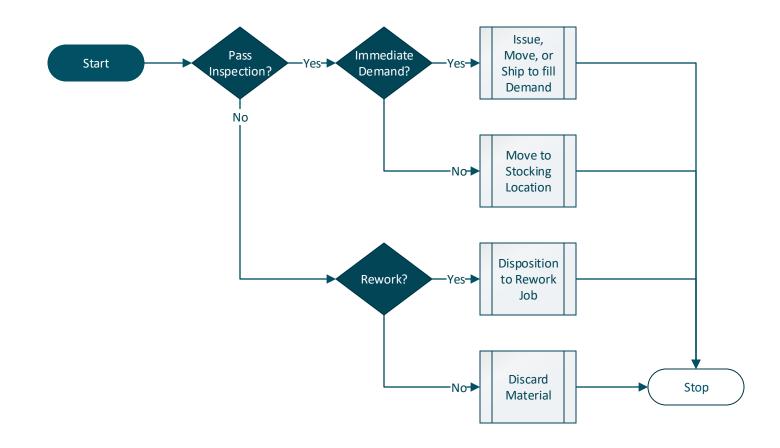
PROCESS DMR





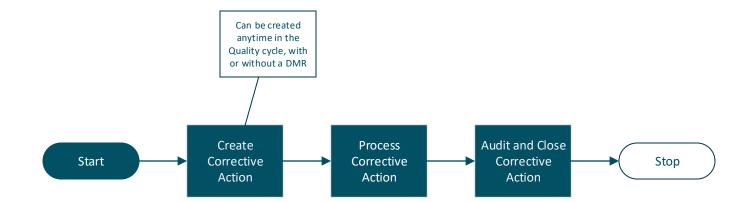
STAGE: Disposition RMA

PROCESS DMR



PROCESS: Corrective Action

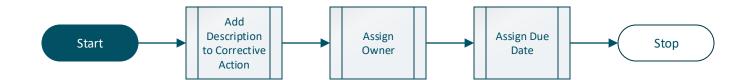
PROCESS DMR





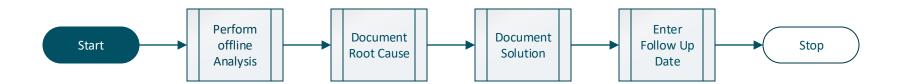
STAGE: Create Corrective Action

CORRECTIVE ACTION



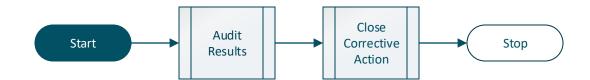
STAGE: Create Corrective Action

CORRECTIVE ACTION



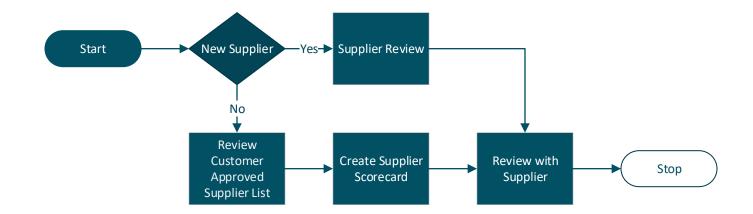
STAGE: Audit and Close Corrective Action

CORRECTIVE ACTION



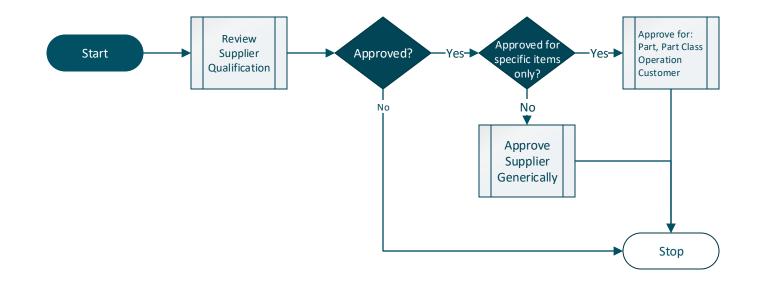
PROCESS: Supplier Review by Quality

CORRECTIVE ACTION



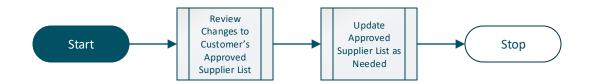
STAGE: Supplier Review

SUPPLIER REVIEW



STAGE: Review Customer Approved Supplier List

SUPPLIER REVIEW



Quality Assurance



FUNCTION MENU

STAGE: Create Supplier Score Card

SUPPLIER REVIEW



STAGE: Review with Supplier

SUPPLIER REVIEW





FUNCTION MENU

QUALITY MENU

Establish
Contracts and
Warranties

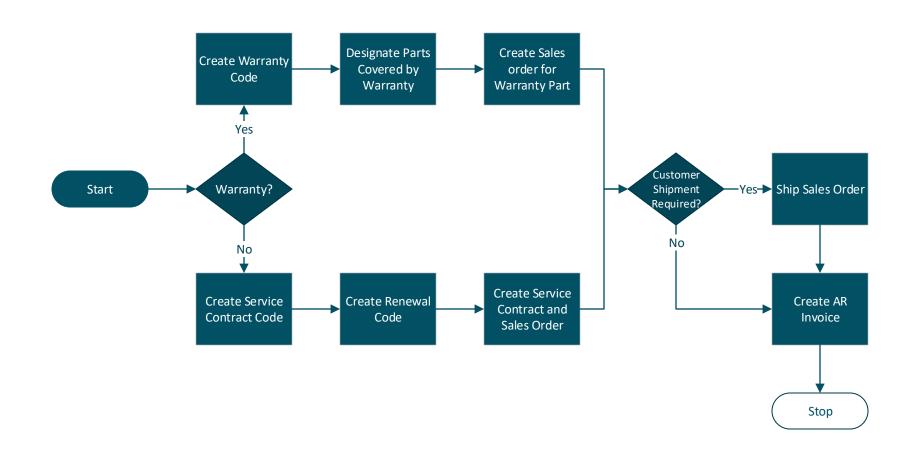
Call For Service

Service Job Processing



PROCESS: Establish Contracts and Warranties

SUPPLIER REVIEW





FUNCTION MENU

STAGE: Create Warranty Code

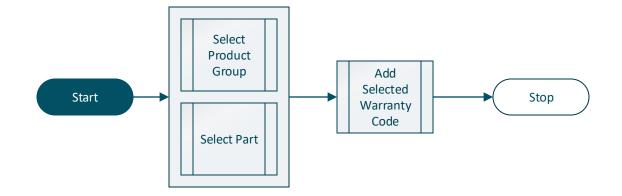
CONTRACTS AND WARRANTIES





STAGE: Designate Parts Covered by Warranty

CONTRACTS AND WARRANTIES

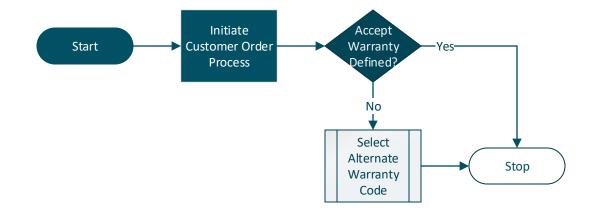


CPICOR

FUNCTION MENU

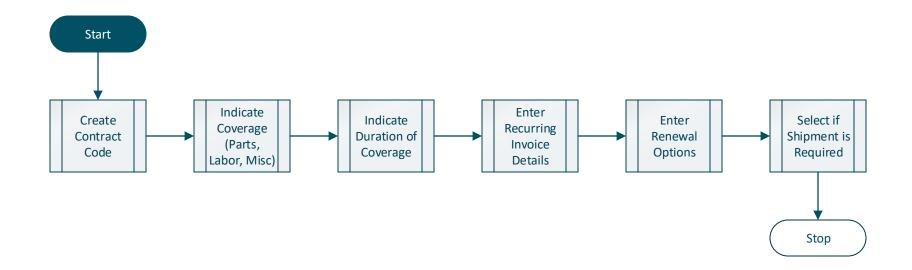
STAGE: Create Sales Order for Warranty Part

CONTRACTS AND WARRANTIES



STAGE: Create Service Contract Code

CONTRACTS AND WARRANTIES



CPICOR

FUNCTION MENU

STAGE: Create Renewal Code

CONTRACTS AND WARRANTIES





FUNCTION MENU

STAGE: Create Service Contract and Sales Order

CONTRACTS AND WARRANTIES



FUNCTION MENU



STAGE: Ship Sales Order

CONTRACTS AND WARRANTIES



FUNCTION MENU



STAGE: Process AR Invoice

CONTRACTS AND WARRANTIES



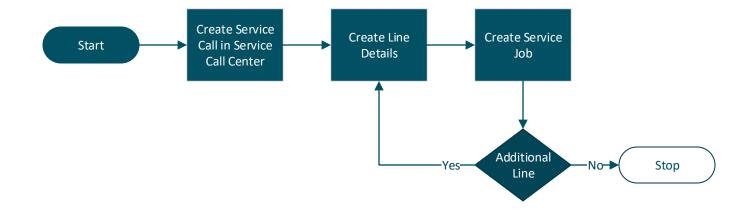
CPICOR

CONTRACTS AND WARRANTIES

FIELD SERVICE MENU

FUNCTION MENU

PROCESS: Call for Service





STAGE: Create Service Call

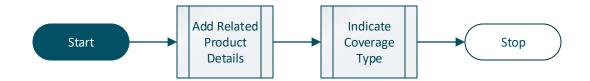
CALL FOR SERVICE





STAGE: Create Line Details

CALL FOR SERVICE

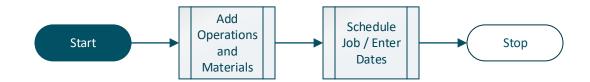


CPICOR

FUNCTION MENU

STAGE: Create Service Job

CALL FOR SERVICE





PROCESS: Service Job Processing

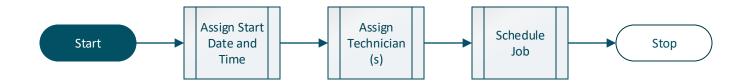
CALL FOR SERVICE





STAGE: Schedule Service Job

PROCESS SERVICE JOB FIELD SERVICE MENU





STAGE: Complete Work

PROCESS SERVICE JOB | FIELD SERVICE MENU



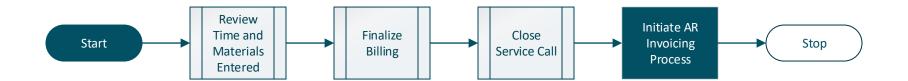
Field Service



FUNCTION MENU

STAGE: Close and Invoice Service Call

PROCESS SERVICE JOB | FIELD SERVICE MENU





FUNCTION MENU PROCESS: Maintenance PROCESS SERVICE JOB MAINTENANCE MENU





STAGE: Identify Equipment and Assets

MAINTENANCE

MAINTENANCE MENU



Maintenance

CPICOR

FUNCTION MENU

STAGE: Setup Maintenance Programs

MAINTENANCE

MAINTENANCE MENU

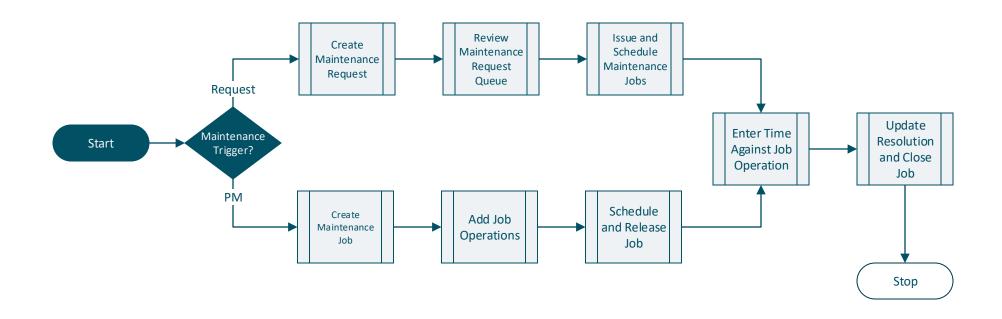




STAGE: Issue and Schedule Maintenance Jobs

MAINTENANCE

MAINTENANCE MENU





FUNCTION MENU

MAINTENANCE MENU

Pick and Ship Orders Pick and Ship Transfers Receive from Suppliers Receive Transfer Orders

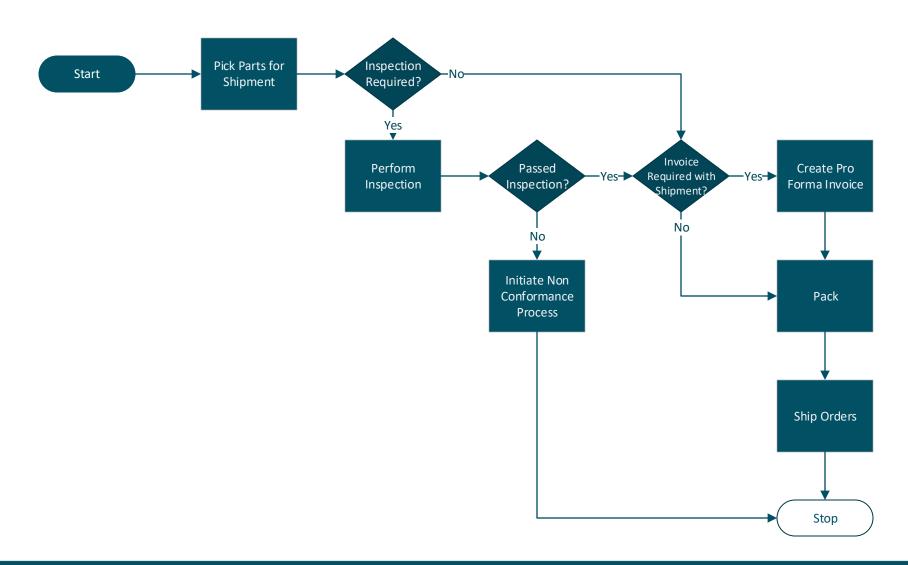
Subcontract Shipments Drop Shipment Receipts



FUNCTION MENU

PROCESS: Pick and Ship Orders

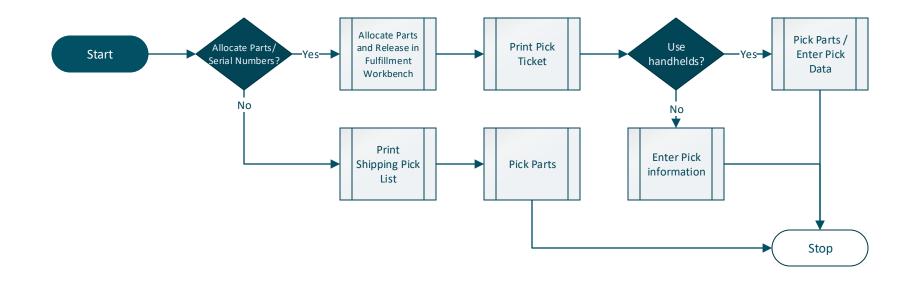
MAINTENANCE





STAGE: Pick Parts for Shipment

PICK AND SHIP ORDERS



FUNCTION MENU



STAGE: Perform Inspection

PICK AND SHIP ORDERS

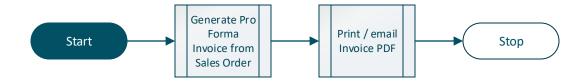




FUNCTION MENU

STAGE: Create Proforma Invoice

PICK AND SHIP ORDERS

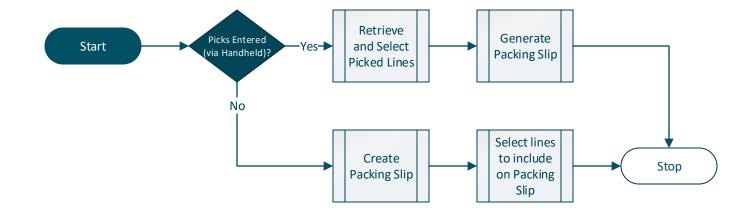


FUNCTION MENU



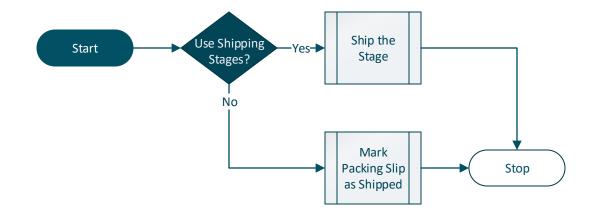
STAGE: Pack

PICK AND SHIP ORDERS



STAGE: Ship Order

PICK AND SHIP ORDERS

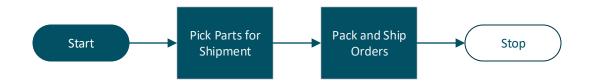




FUNCTION MENU

PROCESS: Pick and Ship Transfer Orders

PICK AND SHIP ORDERS





FUNCTION MENU

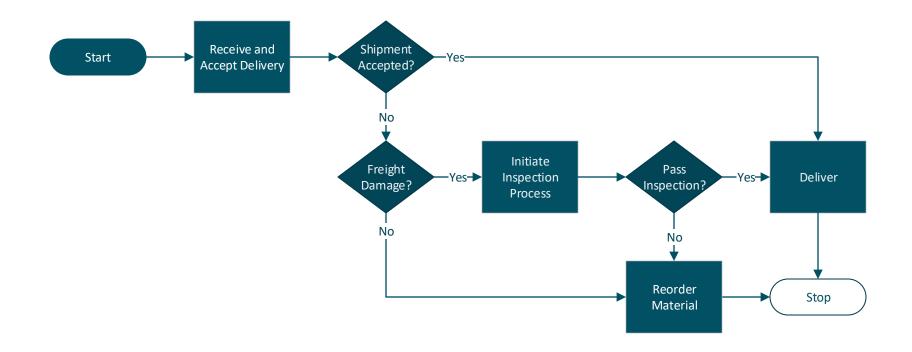
STAGE: Pack and Ship Order

PICK AND SHIP TRANSFERS



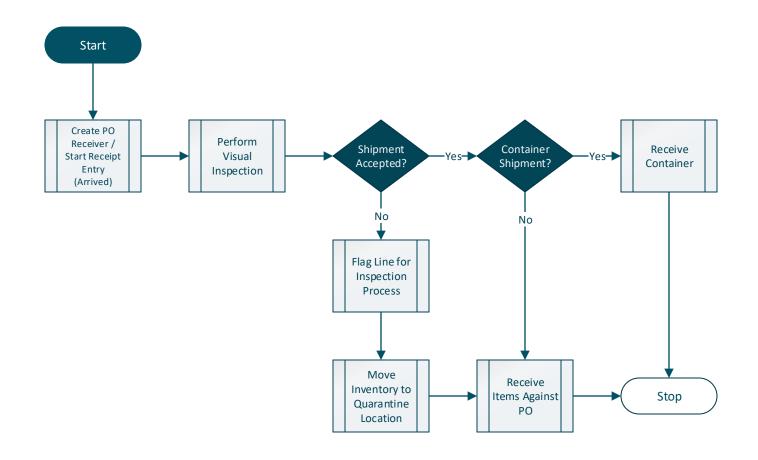
PROCESS: Receive from Suppliers

PICK AND SHIP TRANSFERS



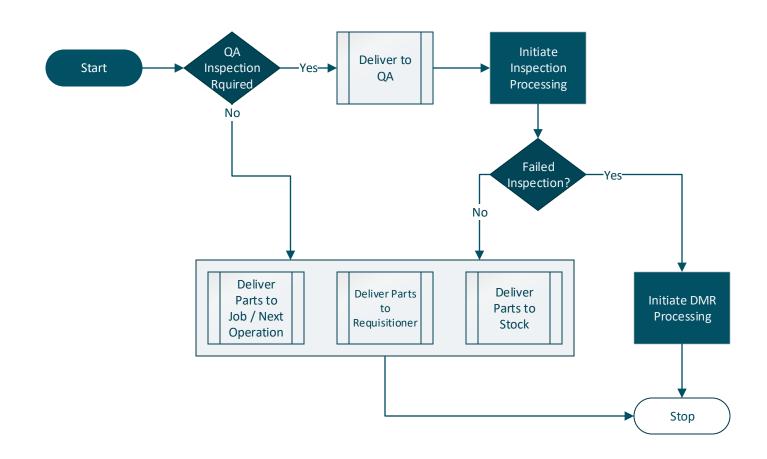
STAGE: Receive and Accept Delivery

RECEIVE FROM SUPPLIERS



STAGE: Deliver

RECEIVE FROM SUPPLIERS

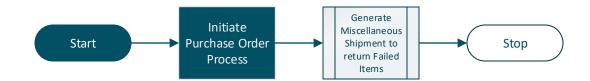


FUNCTION MENU



STAGE: Reorder Material

RECEIVE FROM SUPPLIERS



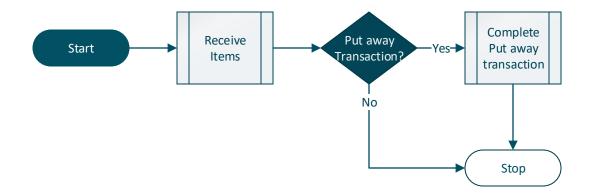
PROCESS: Receive Transfer

RECEIVE FROM SUPPLIERS



STAGE: Receive Transfer Order

RECEIVE TRANSFER ORDER

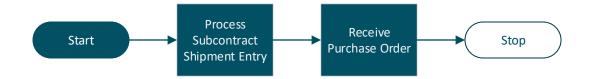




FUNCTION MENU

PROCESS: Subcontract Shipment

RECEIVE TRANSFER ORDER

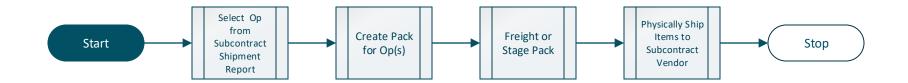




FUNCTION MENU

STAGE: Process Subcontract Shipment Entry

SUBCONTRACT SHIPMENT



FUNCTION MENU

CPICOR

PROCESS: Drop Shipment Receipt

SUBCONTRACT SHIPMENT



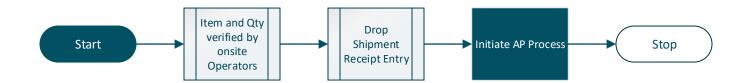
FUNCTION MENU

CPICOR

STAGE: Drop Shipment Receipt Entry

DROPSH
RECE

DROPSHIPMENT RECEIPT





FUNCTION MENU

SHIPPING AND RECEIVING MENU

New Customer Process

Invoice Customer **Customer Credit Check**

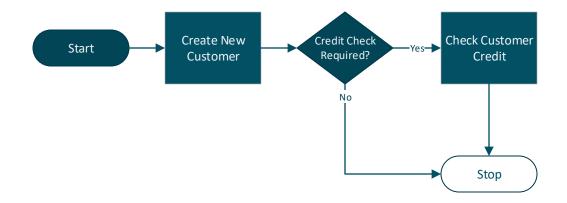
Sales Tax Setup Sales Tax Reporting

Customer Payments



Process: New Customer

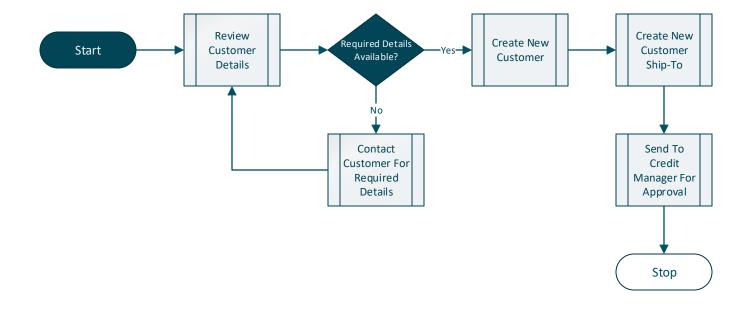
DROP SHIPMENT RECEIPT





Stage: Create New Customer

NEW CUSTOMER

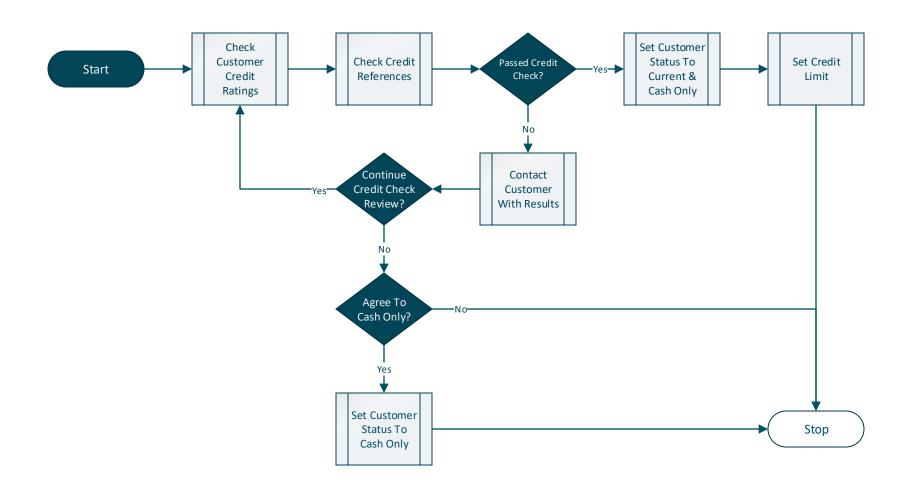


CPICOR

FUNCTION MENU

Stage: Check Customer Credit

NEW CUSTOMER



CPICOR

FUNCTION MENU PROCESS: Invoice Customer

NEW CUSTOMER





FUNCTION MENU STAGE: Create New AR Group

INVOICE CUSTOMER

AR MENU



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.

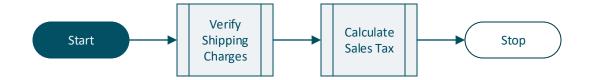
License Requirements:



FUNCTION MENU

STAGE: Process AR Invoices

INVOICE CUSTOMER

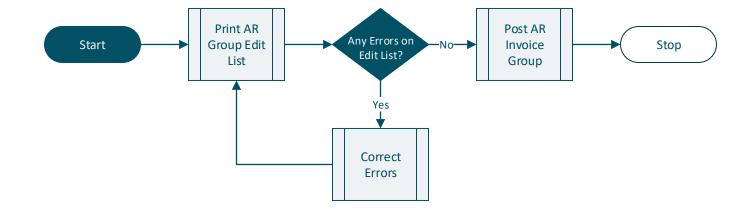




FUNCTION MENU

STAGE: Post AR Invoices

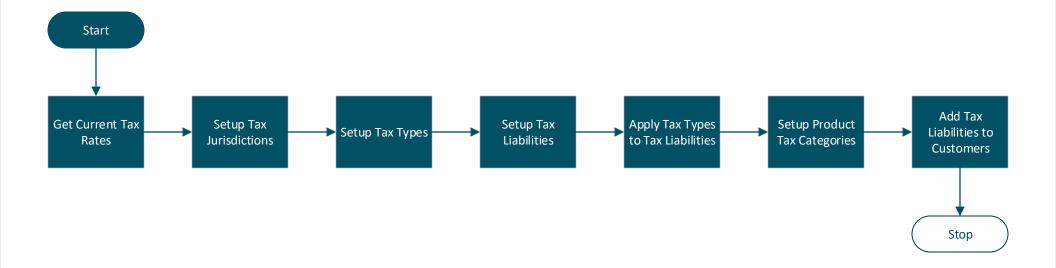
INVOICE CUSTOMER





FUNCTION MENU PROCESS: Sales Tax Setup

INVOICE CUSTOMER





FUNCTION MENU STAGE: Get Current Tax Rates

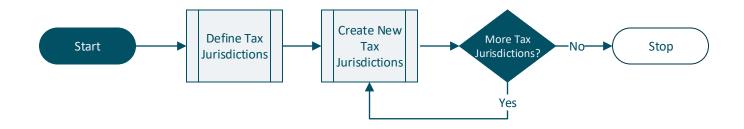
SALES TAX SETUP





STAGE: Setup Tax Jurisdictions

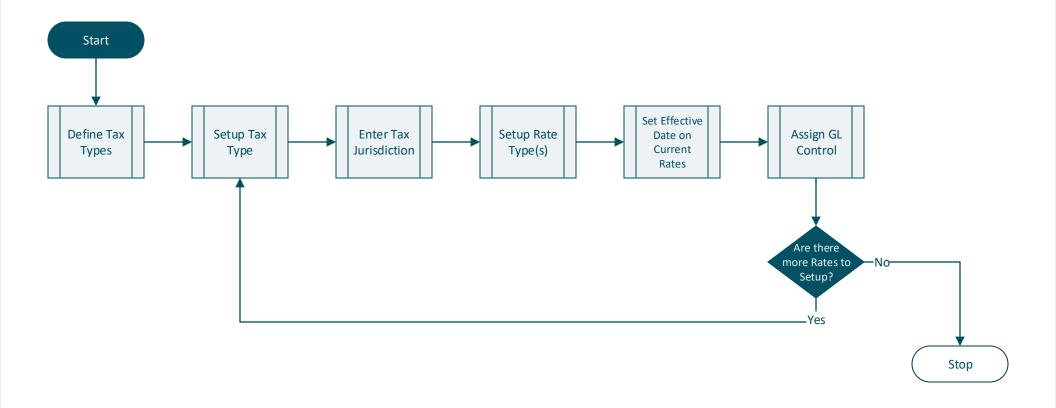
SALES TAX SETUP





STAGE: Setup Tax Types

SALES TAX SETUP



CPICOR

FUNCTION MENU

STAGE: Setup Tax Liabilities

SALES TAX SETUP

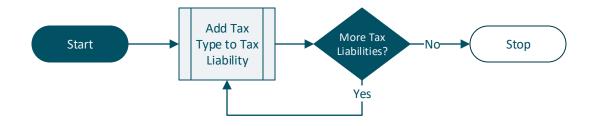


CPICOR

FUNCTION MENU

STAGE: Apply Tax Types to Tax Liabilities

SALES TAX SETUP

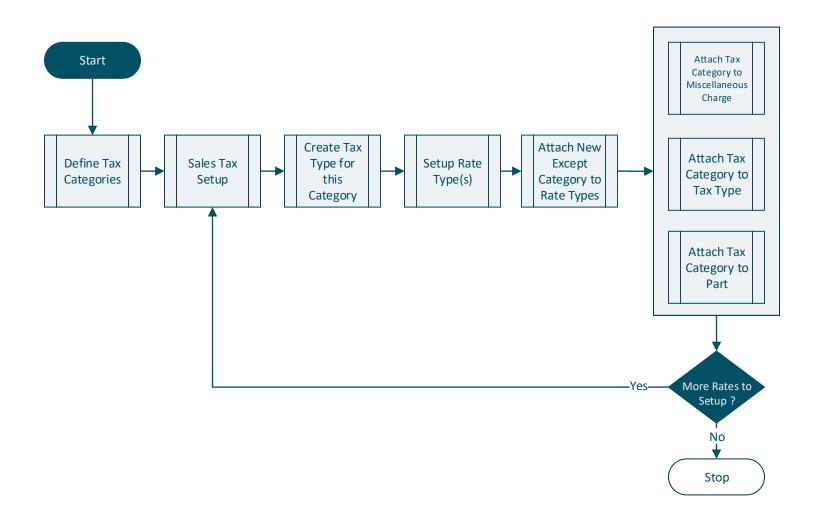


CPICOR

FUNCTION MENU

STAGE: Setup Product Tax Categories

SALES TAX SETUP





STAGE: Add Tax Liabilities to Customers

SALES TAX SETUP

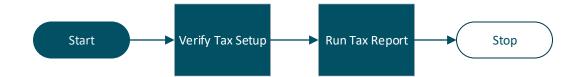


CPICOR

FUNCTION MENU

PROCESS: Sales Tax Reporting

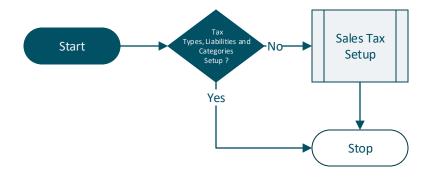
SALES TAX SETUP





STAGE: Verify Tax Setup

SALES TAX REPORTING



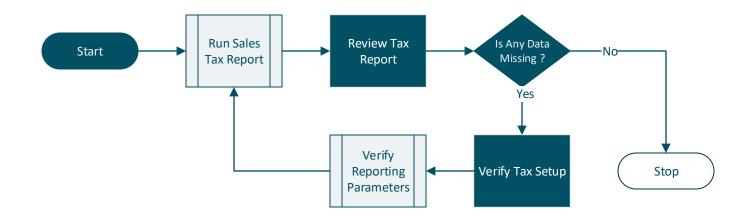
CPICOR

SALES TAX REPORTING

AR MENU

FUNCTION MENU

STAGE: Run Tax Report



CPICOR

FUNCTION MENU

PROCESS: Customer Payments

SALES TAX REPORTING

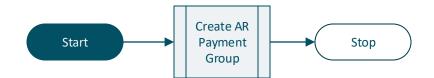


FUNCTION MENU

CPICOR

STAGE: Create Cash Receipts Group

CUSTOMER PAYMENTS

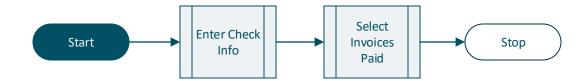


CPICOR

FUNCTION MENU

STAGE: Enter Checks and Match Invoices

CUSTOMER PAYMENTS

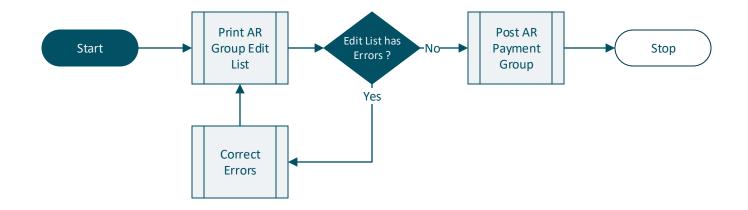


CPICOR

FUNCTION MENU

STAGE: Post AR Payment Group

CUSTOMER PAYMENTS



Accounts Payable



FUNCTION MENU

AR MENU

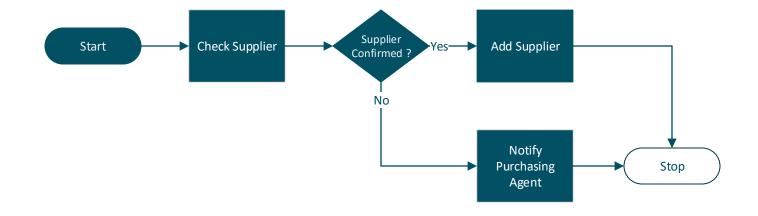
New Supplier Process Supplier Payments

Supplier Invoices

Process Landed Cost

PROCESS: New Supplier

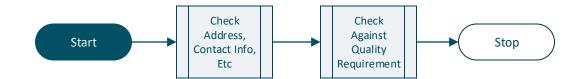
CUSTOMER PAYMENTS





FUNCTION MENU STAGE: Check Supplier

NEW SUPPLIER



STAGE: Add Supplier

NEW SUPPLIER





STAGE: Notify Purchasing Agent

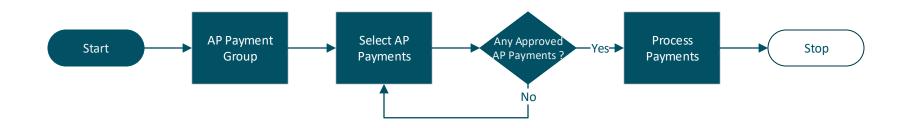
NEW SUPPLIER





PROCESS: Supplier Payments

NEW SUPPLIER





STAGE: AP Payment Group

SUPPLIER PAYMENTS

AP MENU

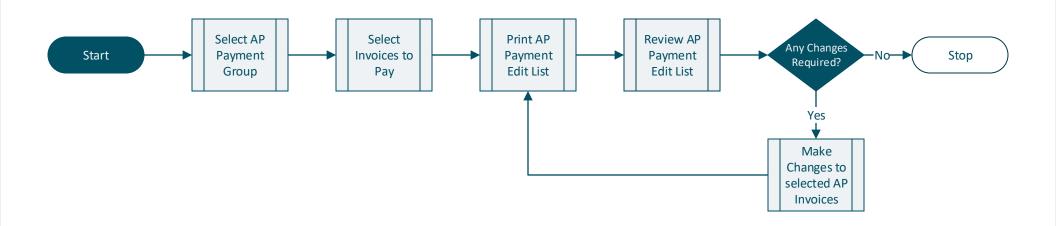


License Requirements:

SUPPLIER PAYMENTS

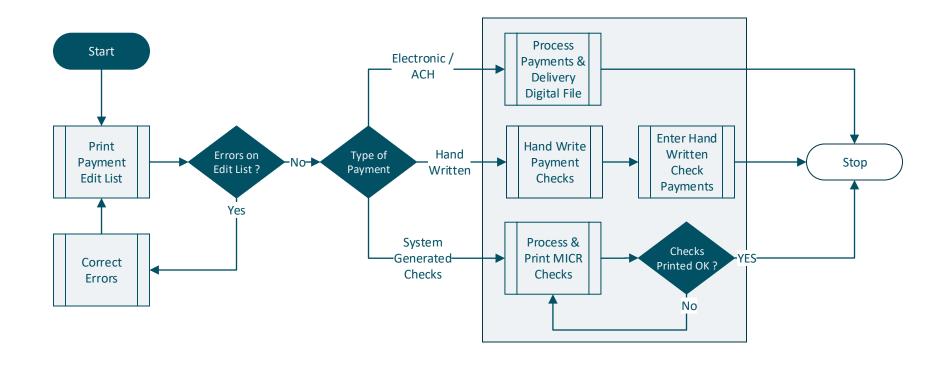
AP MENU

STAGE: Select Payments to Process



STAGE: Process AP Payments

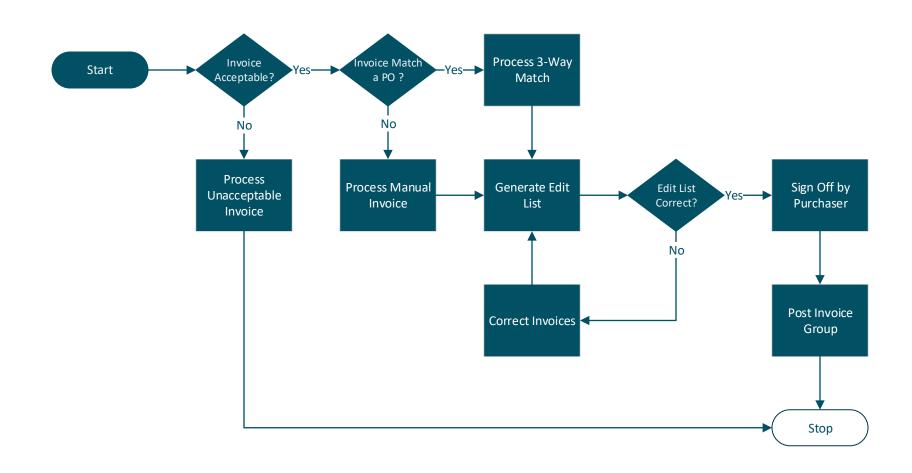
SUPPLIER PAYMENTS





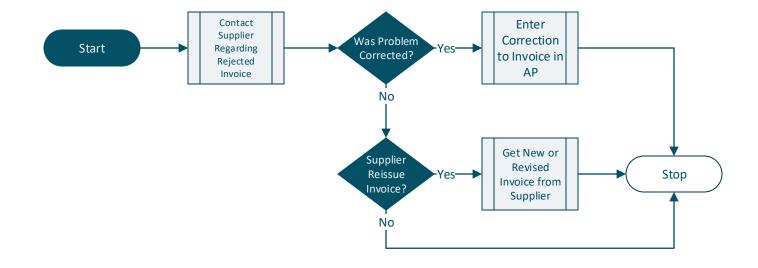
PROCESS: Supplier Invoices

SUPPLIER PAYMENTS



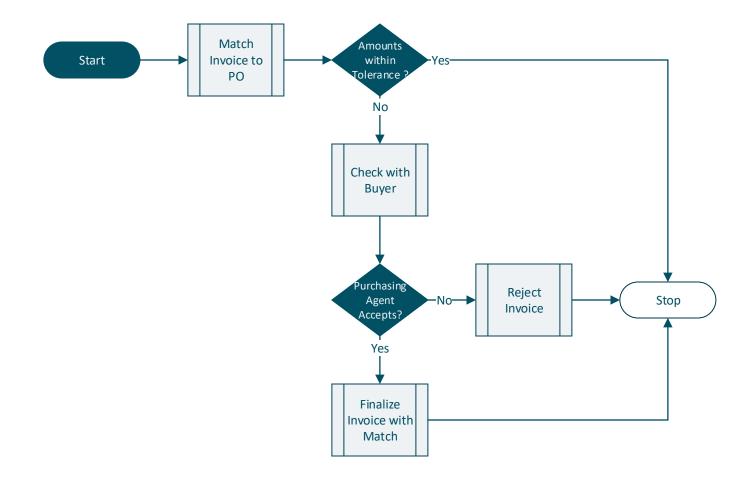
STAGE: Process Unacceptable Invoice

SUPPLIER INVOICES



STAGE: Process 3-Way Match

SUPPLIER INVOICES





STAGE: Process Manual Invoice

SUPPLIER INVOICES





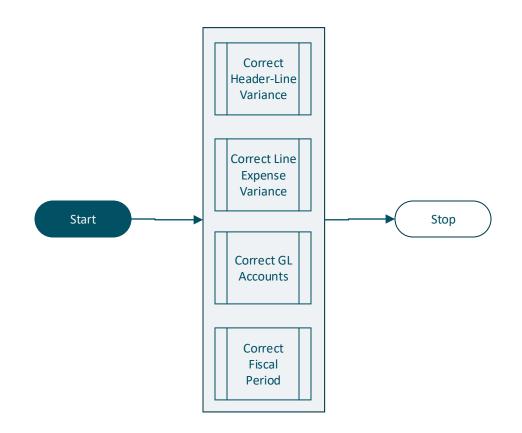
FUNCTION MENU STAGE: Generate Edit List SUPPLIER INVOICES AP MENU





FUNCTION MENU STAGE: Correct Invoices

SUPPLIER INVOICES





STAGE: Sign Off by Purchaser

SUPPLIER INVOICES



STAGE: Post Invoice Group

SUPPLIER INVOICES



PROCESS: Process Landed Cost

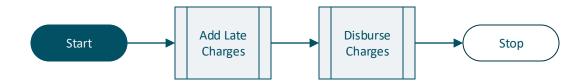
SUPPLIER INVOICES





STAGE: Process Landed Cost Late Charges

LANDED COST PROCESSING



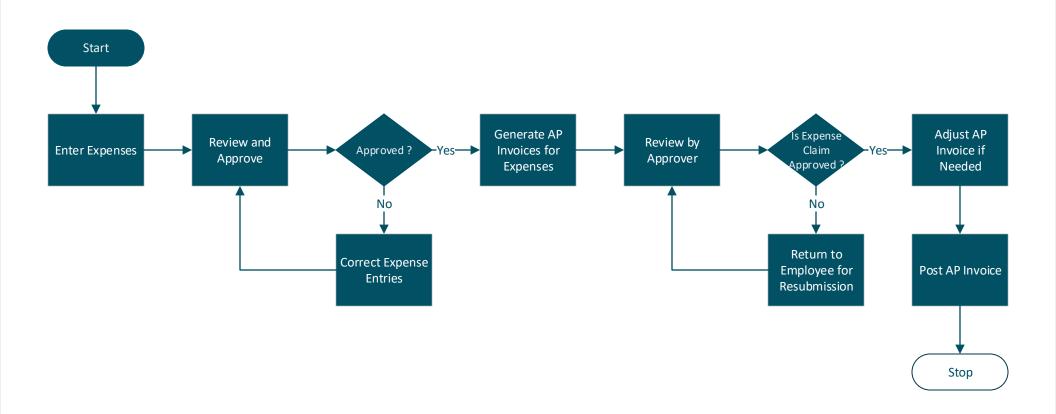
Expense Management

CPICOR

FUNCTION MENU

PROCESS: Employee Expenses

LANDED COST PROCESSING



Expense Management



FUNCTION MENU STAGE: Enter Expenses

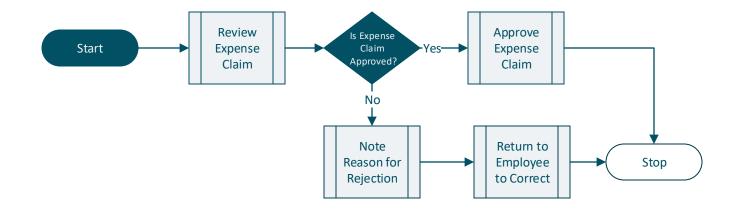
EMPLOYEE EXPENSES





STAGE: Review and Approve

EMPLOYEE EXPENSES



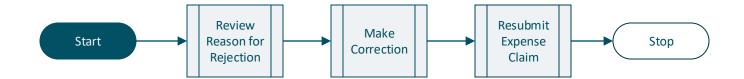
Expense Management



FUNCTION MENU

STAGE: Correct Expense Items

EMPLOYEE EXPENSES





STAGE: Generate AP Invoices for Expenses

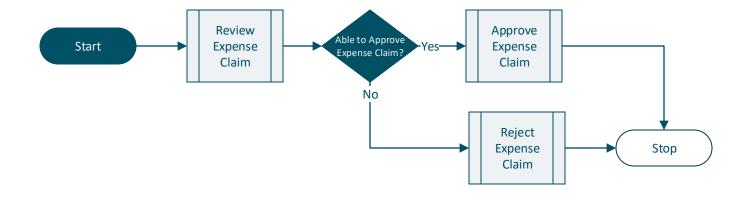
EMPLOYEE EXPENSES





STAGE: Review by Approver

EMPLOYEE EXPENSES





STAGE: Return to Employee for Resubmission

EMPLOYEE EXPENSES

EXPENSE MGMT





STAGE: Adjust AP Invoice if Needed

EMPLOYEE EXPENSES

EXPENSE MGMT

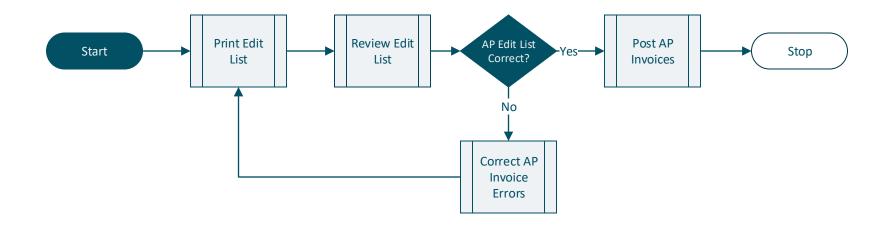




FUNCTION MENU STAGE: Post AP Invoice

EMPLOYEE EXPENSES

EXPENSE MGMT



Asset Management



EXPENSE MGMT

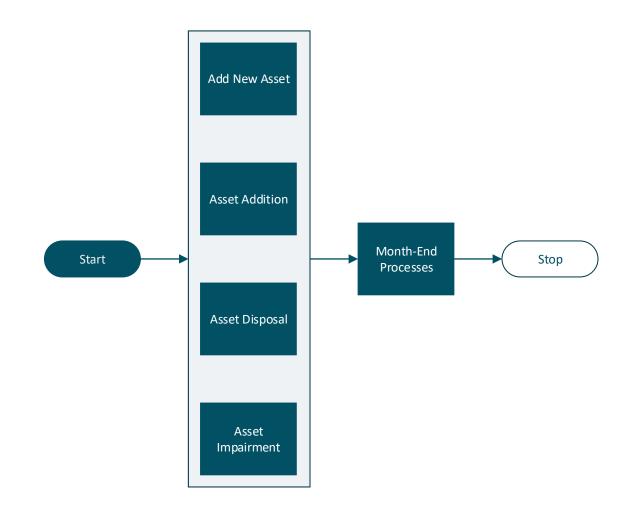
FUNCTION MENU

Maintain Assets

Periodic Asset Processes

PROCESS: Maintain Assets

EMPLOYEE EXPENSES | ASSETS MGMT MENU



Asset Management



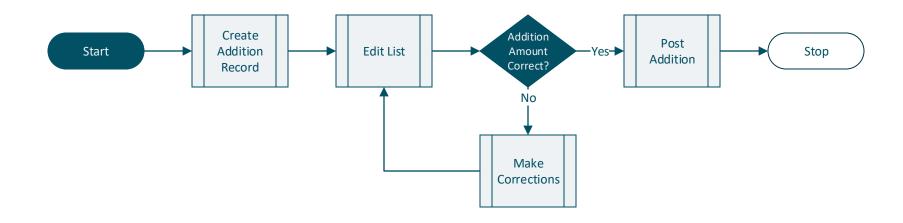
FUNCTION MENU STAGE: Add New Asset

MAINTAIN ASSETS



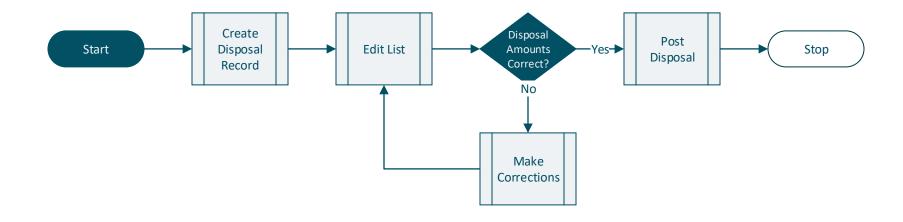
FUNCTION MENU STAGE: Asset Addition

MAINTAIN ASSETS



FUNCTION MENU STAGE: Asset Disposal

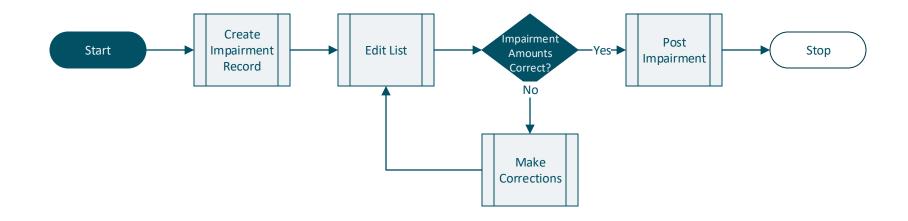
MAINTAIN ASSETS





STAGE: Asset Impairment

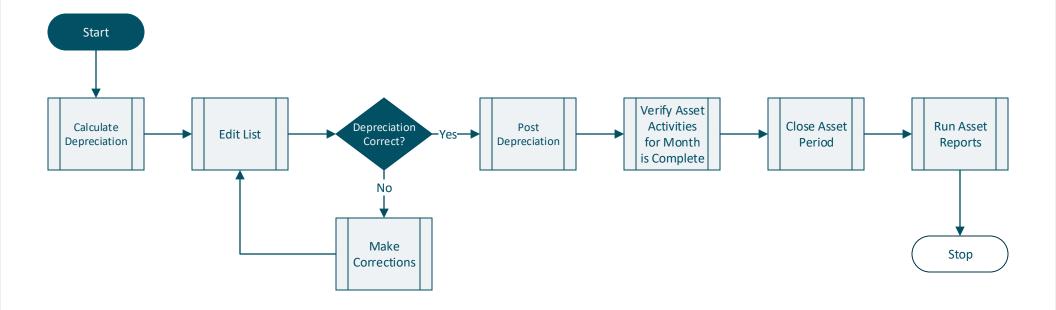
MAINTAIN ASSETS





STAGE: Month-End Processes

MAINTAIN ASSETS



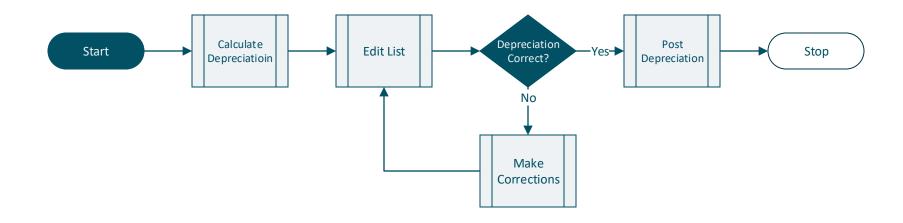
PROCESS: Periodic Asset Processes

MAINTAIN ASSETS



STAGE: Depreciation

PERIODIC ASSET PROCESSES



Asset Management

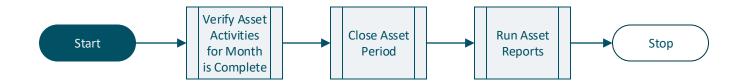
FUNCTION MENU



PERIODIC ASSET PROCESSES

ASSETS MGMT MENU

STAGE: Period-End Processes



General Ledger



FUNCTION MENU

ASSETS MGMT MENU

End of Period Processing

Bank Reconciliation

Budgeting

Financial Reporting

Create New GL Accounts

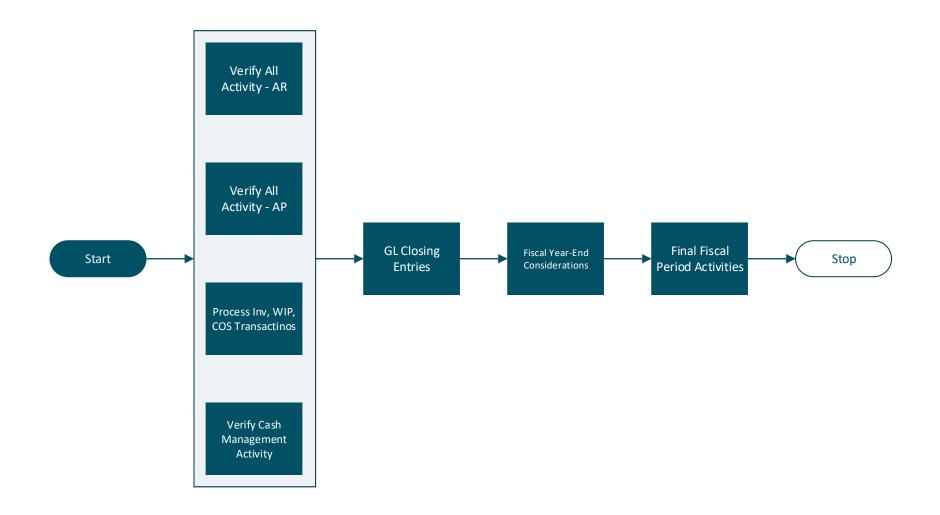
Journal Entries

CPICOR

FUNCTION MENU

PROCESS: End of Period Processing

PERIODIC ASSET PROCESSES

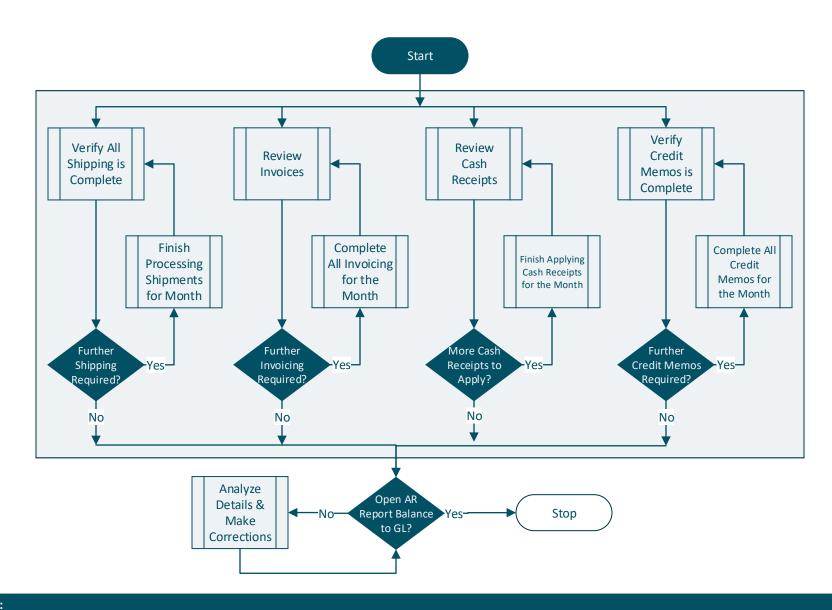


CPICOR

FUNCTION MENU

PROCESS: Verify All Activity - AR

END OF PERIOD PROCESSING



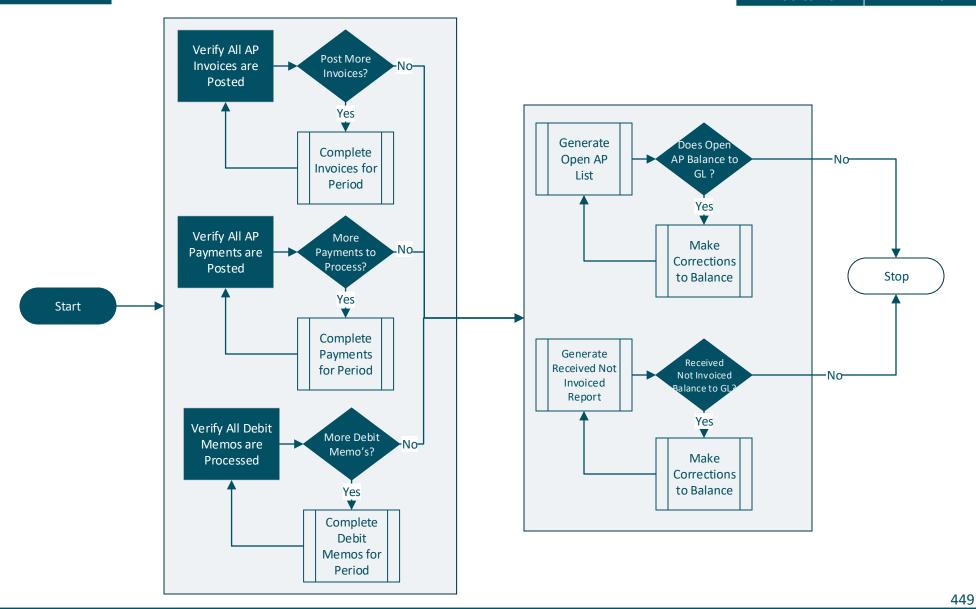
General Ledger



FUNCTION MENU STAGE: Verify All Activity - AP

END OF PERIOD PROCESSING

GENERAL LEDGER
MENU



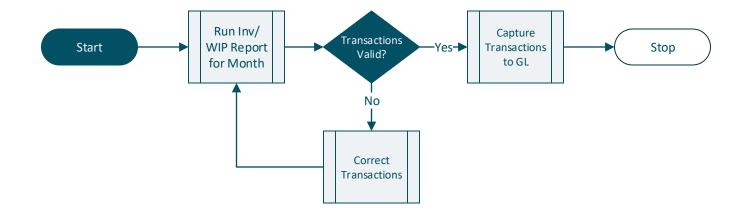
- Accounting Manager
License Requirements:

END OF PERIOD PROCESSING

GENERAL LEDGER MENU

FUNCTION MENU

STAGE: Process Inv, WIP, COS Transactions



CPICOR

FUNCTION MENU

STAGE: Verify Cash Management Activity

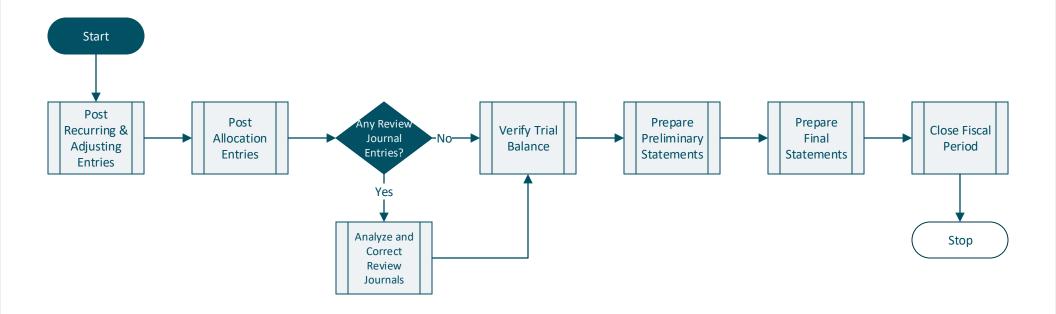
END OF PERIOD PROCESSING



CPICOR

STAGE: GL Closing Entries

END OF PERIOD PROCESSING



General Ledger

CPICOR

FUNCTION MENU

STAGE: Fiscal Year-End Considerations

END OF PERIOD PROCESSING

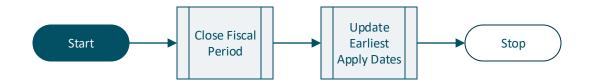


CPICOR

FUNCTION MENU

STAGE: Final Fiscal Period Activities

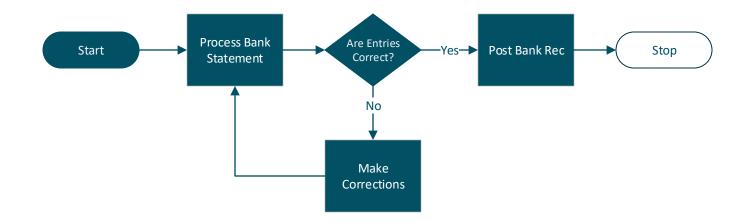
END OF PERIOD PROCESSING



CPICOR

PROCESS: Bank Reconciliation

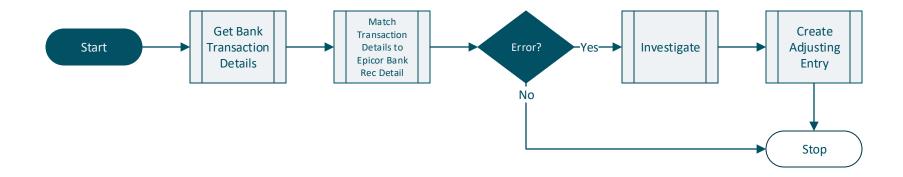
END OF PERIOD PROCESSING



CPICOR

STAGE: Process Bank Statement

BANK RECONCILIATION





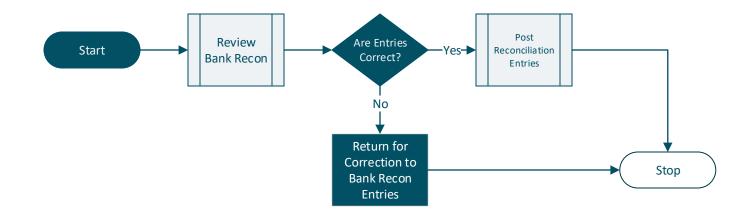
STAGE: Make Corrections

BANK RECONCILIATION



STAGE: Post Bank Rec

BANK RECONCILIATION



General Ledger

FUNCTION MENU



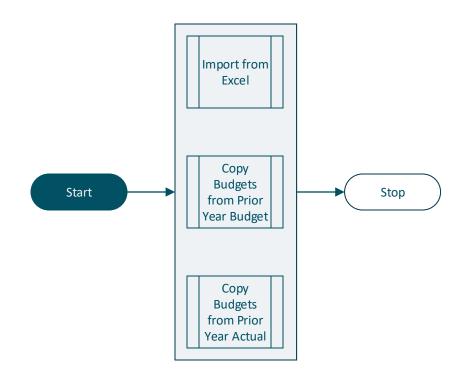
PROCESS: Budgeting

BANK RECONCILIATION



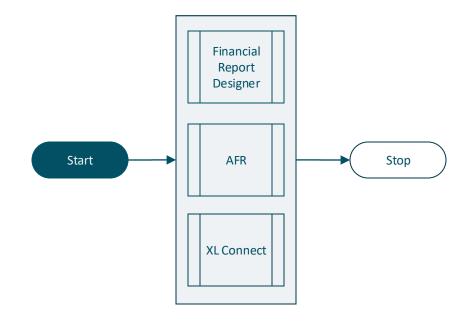
STAGE: Load GL Budgets for Fiscal Year

BUDGETING



STAGE: Perform Financial Reporting with Budgets

BUDGETING



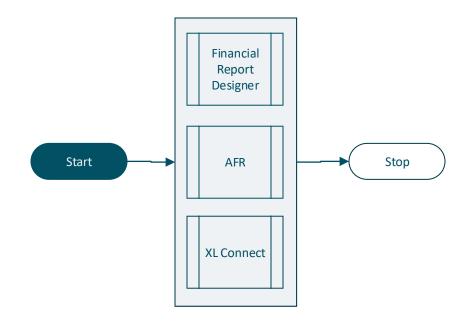
PROCESS: Financial Reporting

BUDGETING



STAGE: Choose Financial Reporting Tool

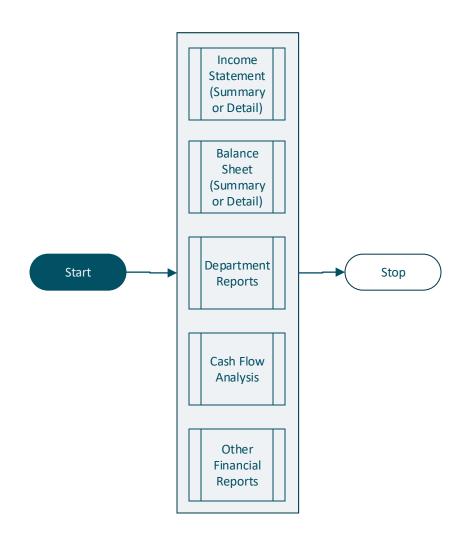
FINANCIAL REPORTING



CPICOR

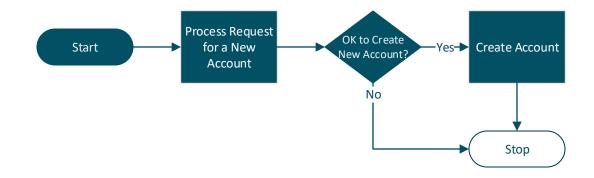
STAGE: Choose Financial Reporting Tool

FINANCIAL REPORTING



PROCESS: Create New GL Account

FINANCIAL REPORTING

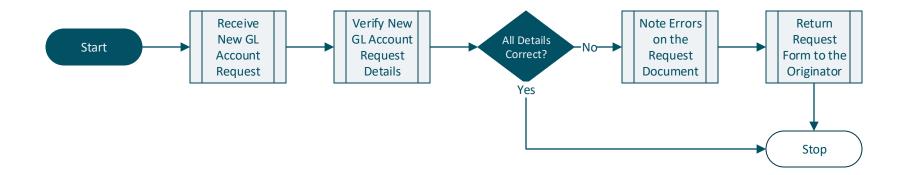


CPICOR

FUNCTION MENU

STAGE: Process Request for a New Account

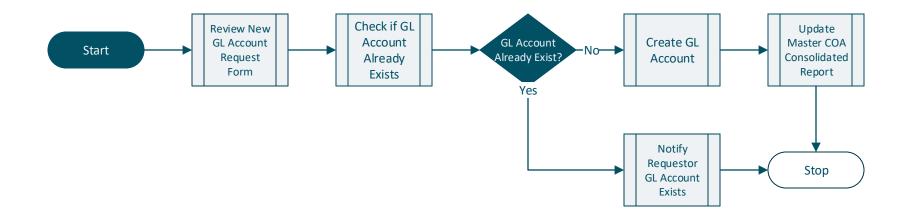
CREATE NEW GL ACCOUNT



CPICOR

STAGE: Create Account

CREATE NEW GL ACCOUNT



FUNCTION MENU PROCESS: Journal Entries

CREATE NEW GL ACCOUNT



STAGE: Create Journal Entry Group

JOURNAL ENTRIES

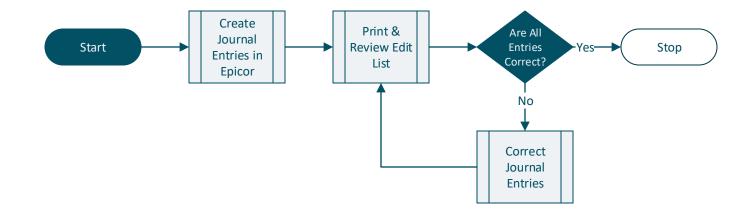
GENERAL LEDGER MENU



STAGE: Create Journal Entries

JOURNAL ENTRIES

GENERAL LEDGER MENU

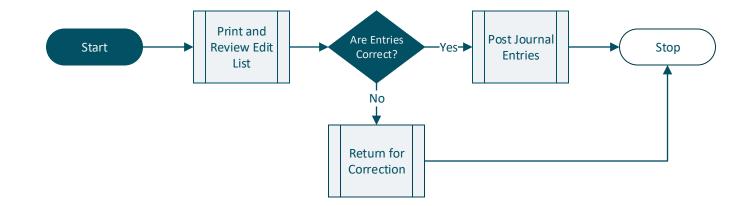


CPICOR

FUNCTION MENU STAGE: Post Journal Entries

JOURNAL ENTRIES

GENERAL LEDGER MENU



Cost Accounting

CPICOR

FUNCTION MENU

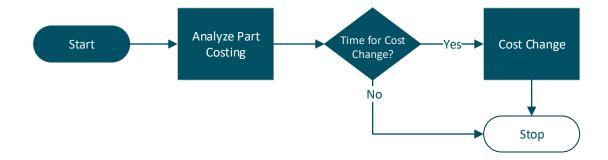
GENERAL LEDGER MENU

Part Cost Maintenance Costing Periodic Processes

CPICOR

FUNCTION MENU PROCESS: Part Cost Maintenance

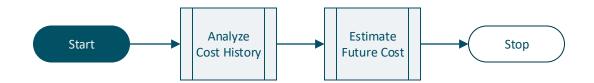
JOURNAL ENTRIES



CPICOR

PART COST MAINTENANCE COST ACCOUNT MENU

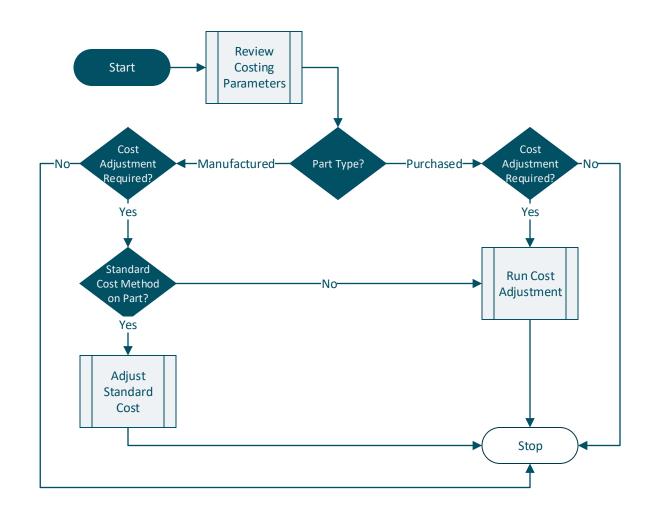
FUNCTION MENU STAGE: Analyze Part Costing



CPICOR

STAGE: Cost Change

PART COST MAINTENANCE



CPICOR

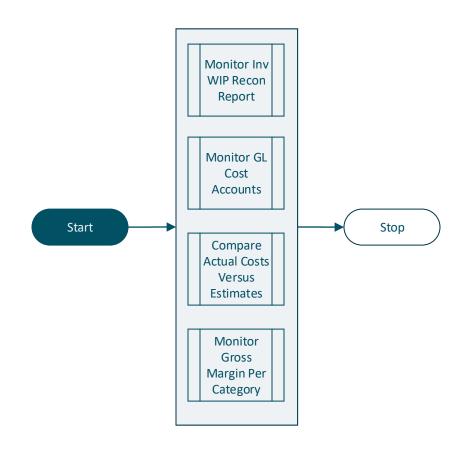
PART COST MAINTENANCE COST ACCOUNT
MENU

PROCESS: Costing Periodic Processes



STAGE: Monitor Transactions

PERIODIC PROCESSES

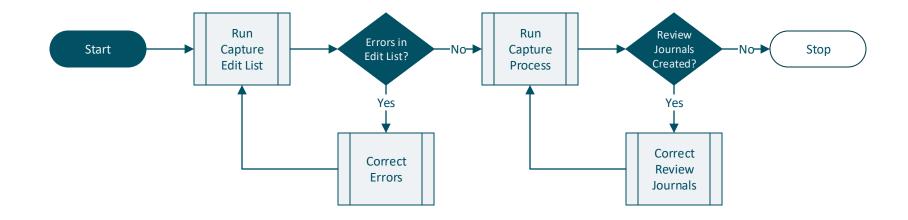


CPICOR

FUNCTION MENU

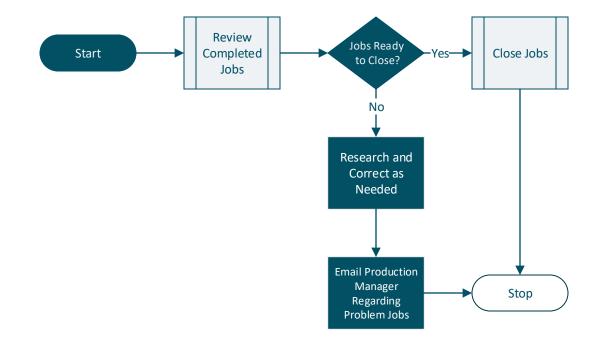
STAGE: Run Capture Process

PERIODIC PROCESSES



STAGE: Close Jobs

PERIODIC PROCESSES



Multi-Company



FUNCTION MENU

COST ACCOUNT MENU

Consolidate to Parent

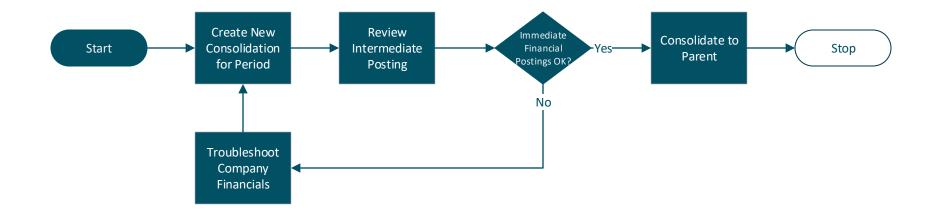
Inter Company Trading Multi Company AP and GL

Global Rate Types / Currency Codes

Centralized AP Payments

PROCESS: Consolidate to Parent

PERIODIC PROCESSES



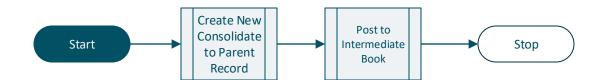
Multi-Company

FUNCTION MENU

CPICOR

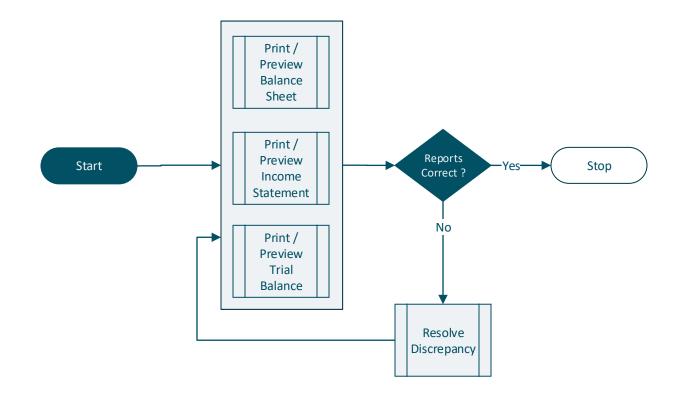
STAGE: Create New Consolidation for the Period

CONSOLIDATE TO PARENT



STAGE: Review Intermediate Posting

CONSOLIDATE TO PARENT



Multi-Company

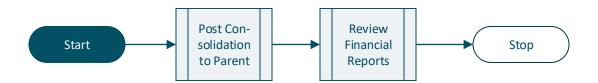
FUNCTION MENU

CPICOR

CONSOLIDATE TO PARENT

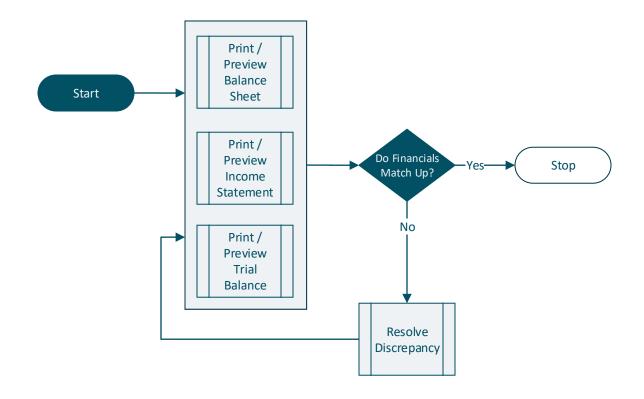
MULTI COMPANY MENU

STAGE: Consolidate to Parent



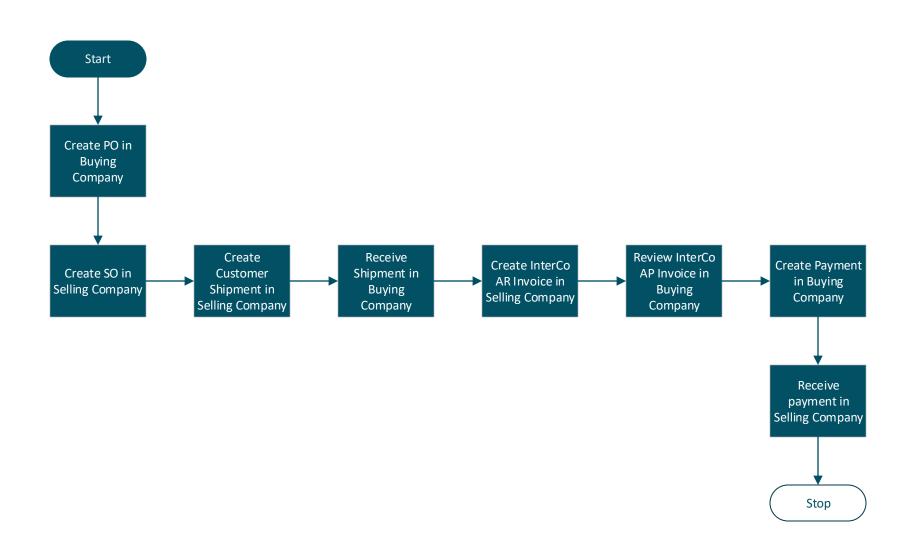
STAGE: Troubleshoot Company Financials

CONSOLIDATE TO PARENT



PROCESS: InterCompany Trading

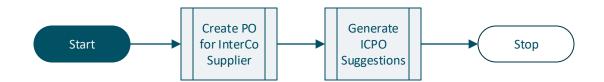
CONSOLIDATE TO PARENT





PROCESS: Create PO in Buying Company

INTER COMPANY TRADING



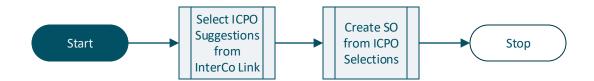
Multi-Company

FUNCTION MENU

CPICOR

STAGE: Create SO In Selling Company

INTER COMPANY TRADING



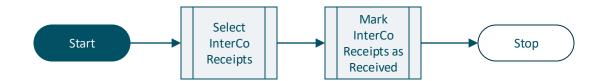
STAGE: Create Customer Shipment in Selling Company

INTER COMPANY TRADING



STAGE: Receive Shipment in Buying Company

INTER COMPANY TRADING



Multi-Company



FUNCTION MENU

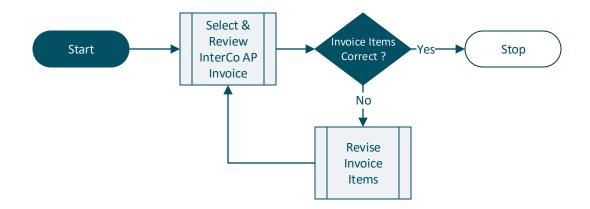
STAGE: Create InterCompany AR Invoice in Selling Company

INTER COMPANY TRADING



STAGE: Review InterCompany AP Invoice in Buying Company

INTER COMPANY TRADING



STAGE: Create Payment in Buying Company

INTER COMPANY TRADING



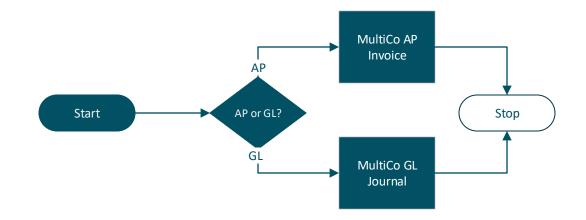
STAGE: Receive Payment in Selling Company

INTER COMPANY TRADING



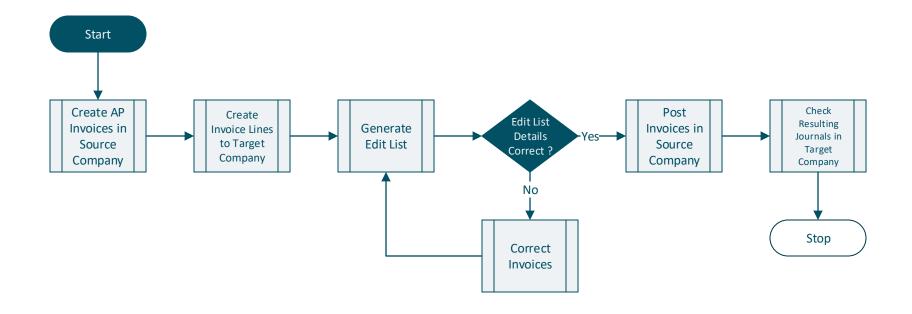
PROCESS: Multi-Company AP & GL

INTER COMPANY TRADING



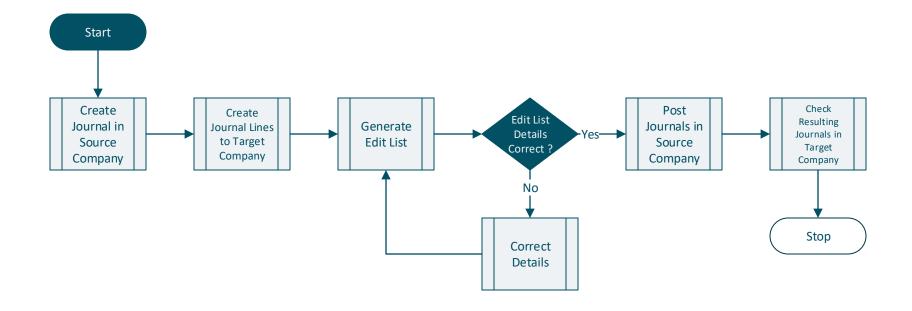
STAGE: Multi-Company AP Invoice

MULTI COMPANY AP



STAGE: Multi-Company GL Journal

MULTI COMPANY AP



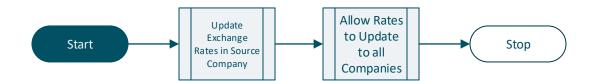
PROCESS: Global Rate Types and Currency Codes

MULTI COMPANY AP



STAGE: Update All Currency Exchange Rates

GLOBAL RATE TYPE / CURRENCY



STAGE: Verify Exchange Rates Updated in All Companies

GLOBAL RATE TYPE /
CURRENCY



PROCESS: Centralized AP Payments

GLOBAL RATE TYPE /
CURRENCY



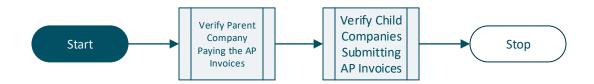
Multi-Company

CPICOR

CENTRALIZED AP PAYMENTS MULTI COMPANY MENU

FUNCTION MENU

STAGE: Determine AP Payment Links



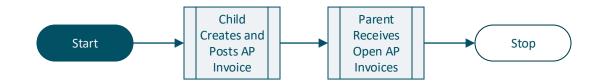
Multi-Company

FUNCTION MENU

CPICOR

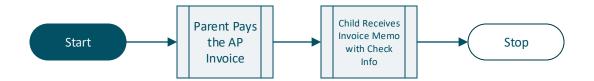
STAGE: Child Company Creates AP Invoice

CENTRALIZED AP PAYMENTS



STAGE: Parent Company Pays the AP Invoice

CENTRALIZED AP PAYMENTS



Currency



FUNCTION MENU

MULTI COMPANY MENU

Update Exchange Rates Month-End Currency Processes

CPICOR

FUNCTION MENU

PROCESS: Update Exchange Rates

CENTRALIZED AP PAYMENTS





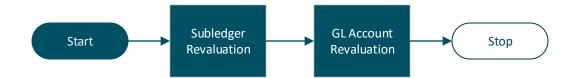
STAGE: Update Exchange Rates

UPDATE EXCHANGE RATES



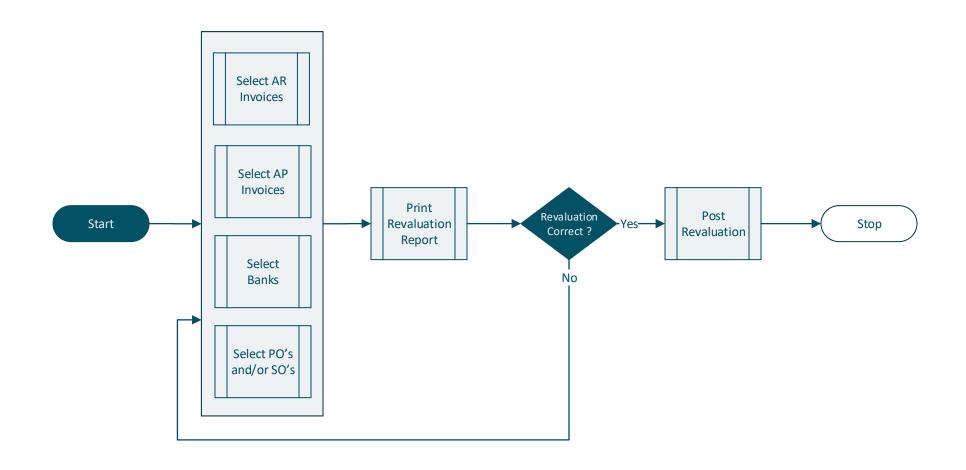
PROCESS: Month-End Currency Processes

UPDATE EXCHANGE RATES



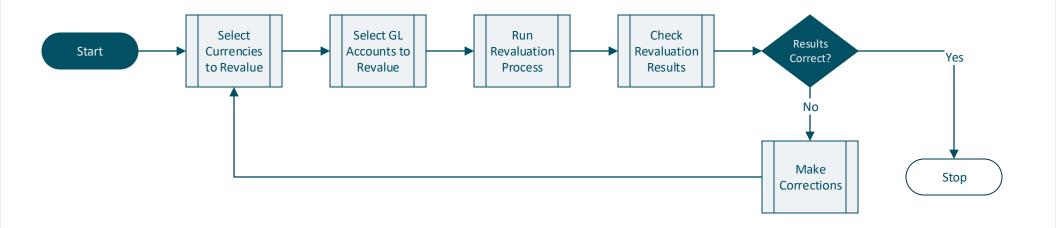
STAGE: Subledger Revaluation

MONTH END CURRENCY



STAGE: GL Account Revaluation

MONTH END CURRENCY



Credit Card Processing



FUNCTION MENU

CURRENCY MENU

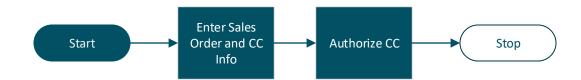
Authorize CC on SO

Ship a CC Sales Order Process a CC Payment

Process a CC Refund

PROCESS: Authorize CC on SO

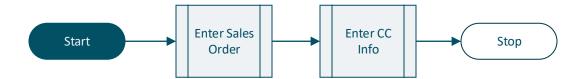
MONTH END CURRENCY





STAGE: Enter Sales Order and CC Info

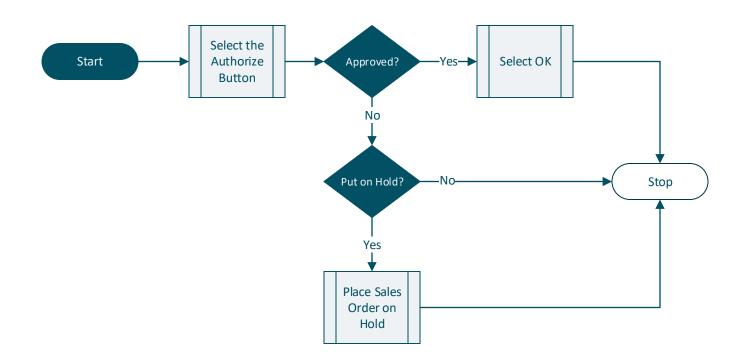
AUTHORIZE CC ON SO





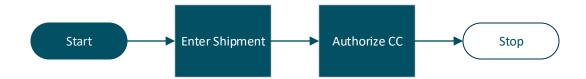
STAGE: Authorize CC

AUTHORIZE CC ON SO



PROCESS: Ship a CC Sales Order

AUTHORIZE CC ON SO



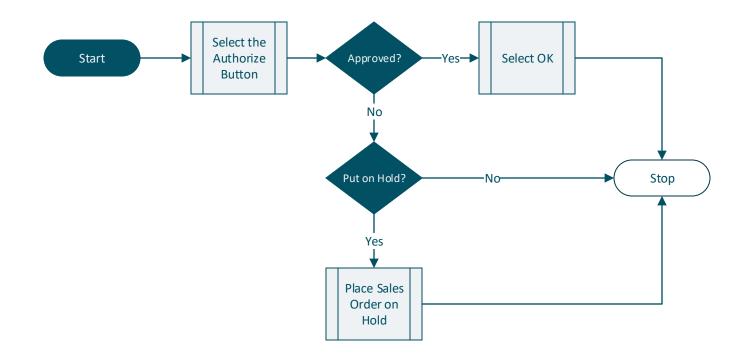
STAGE: Enter Shipment

SHIP A CC ORDER



STAGE: Authorize CC

SHIP A CC ORDER



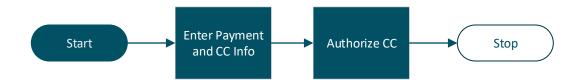
Credit Card Processing



FUNCTION MENU

PROCESS: Credit Card Payment

SHIP A CC ORDER



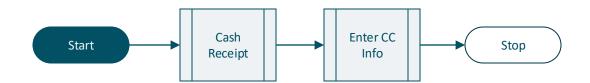
Credit Card Processing



FUNCTION MENU

STAGE: Enter Payment and CC Info

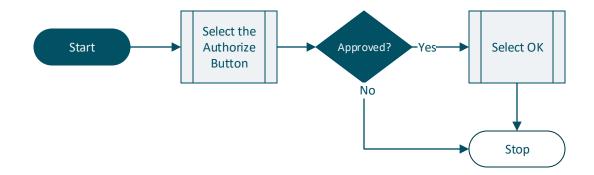
CREDIT CARD PAYMENT





STAGE: Authorize CC

CREDIT CARD PAYMENT



Credit Card Processing

FUNCTION MENU



PROCESS: Credit Card Refund

CREDIT CARD PAYMENT



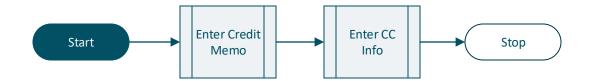
Credit Card Processing



FUNCTION MENU

STAGE: Create Credit Memo and Enter CC Info

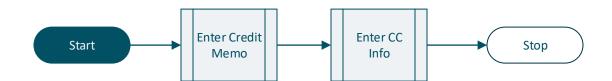
CREDIT CARD REFUND





FUNCTION MENU STAGE: Authorize CC

CREDIT CARD REFUND



Rebates



CREDIT CARD

PROCESS MENU

FUNCTION MENU

Rebate Contract Rebate Processing



PROCESS: Rebate Contract

CREDIT CARD REFUND





STAGE: Create Rebate Contract

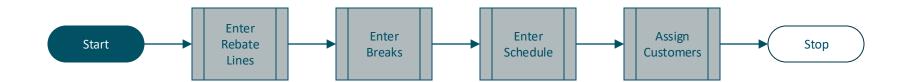
REBATE CONTRACT





STAGE: Add Rebate Contract Details

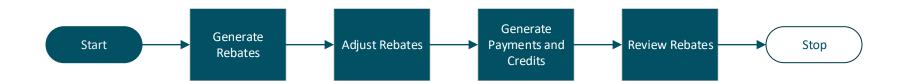
REBATE CONTRACT





PROCESS: Rebate Processing

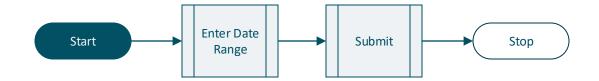
REBATE CONTRACT





STAGE: Generate Rebates

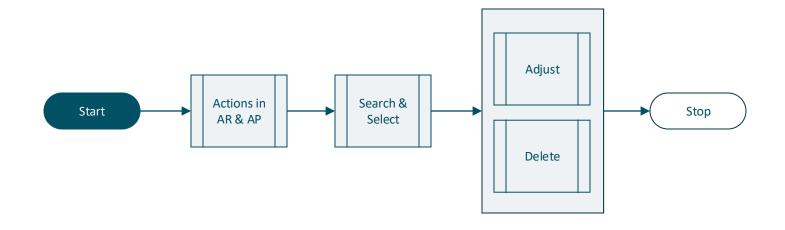
REBATE PROCESSING





STAGE: Adjust Rebates

REBATE PROCESSING





STAGE: Generate Payment and Credits

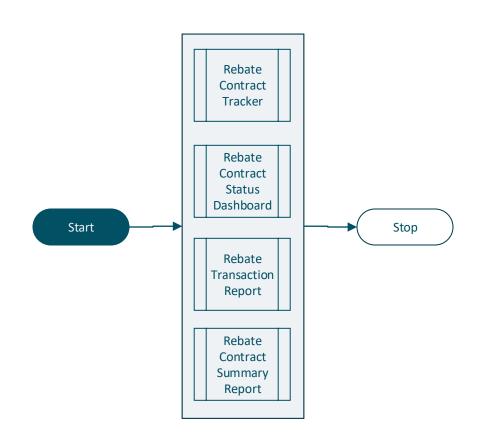
REBATE PROCESSING





FUNCTION MENU STAGE: Review Rebates

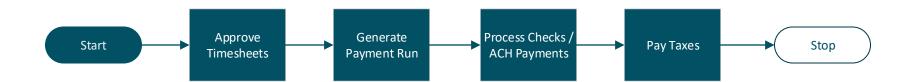
REBATE PROCESSING





PROCESS: Create Payroll Checks

REBATE PROCESSING

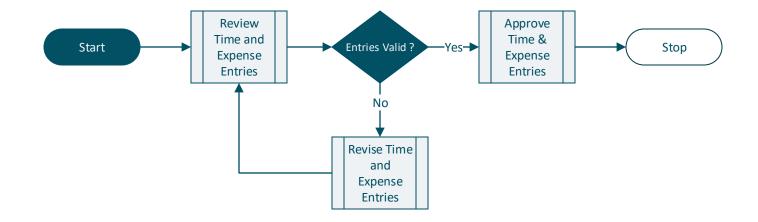


CPICOR

FUNCTION MENU

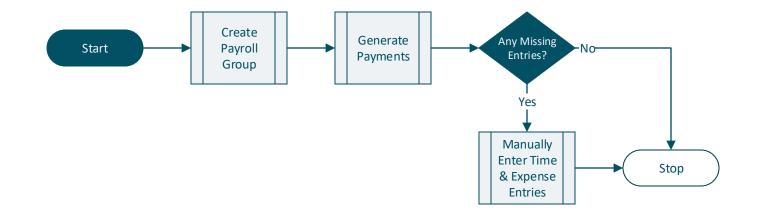
STAGE: Approve Timesheets

CREATE PAYROLL CHECKS



STAGE: Generate Payment Run

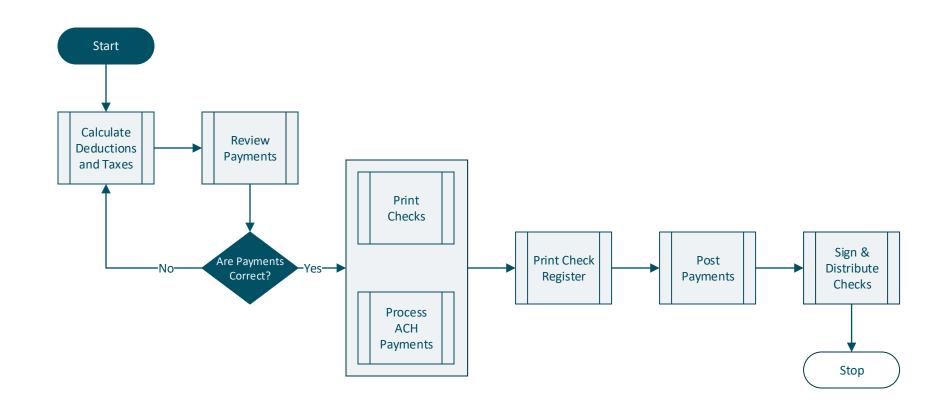
CREATE PAYROLL
CHECKS



CPICOR

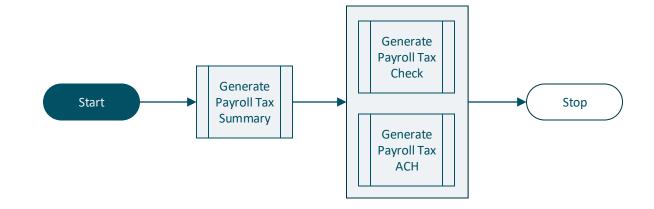
STAGE: Process Checks / ACH Payments

CREATE PAYROLL
CHECKS



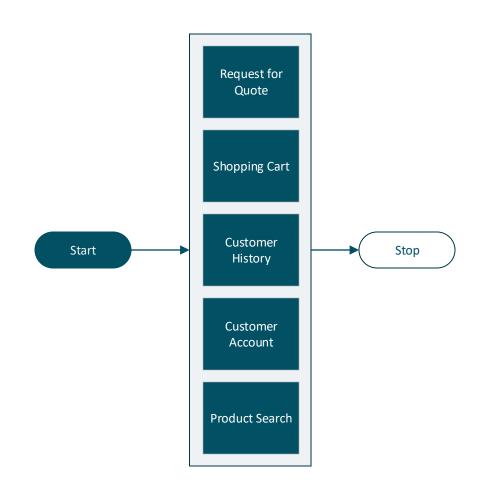
STAGE: Pay Taxes

CREATE PAYROLL
CHECKS



PROCESS: Customer Connect

CREATE PAYROLL
CHECKS



Commerce Connect



FUNCTION MENU STAGE: Request for Quote

CUSTOMER CONNECT



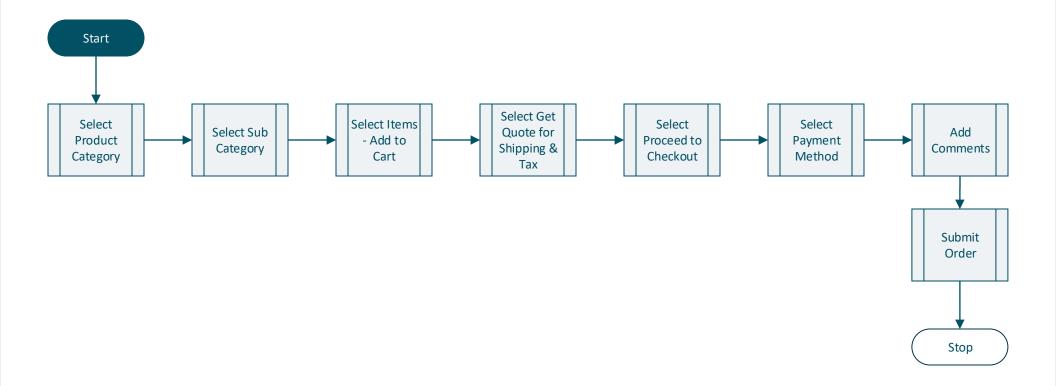
Commerce Connect

FUNCTION MENU



STAGE: Shopping Cart

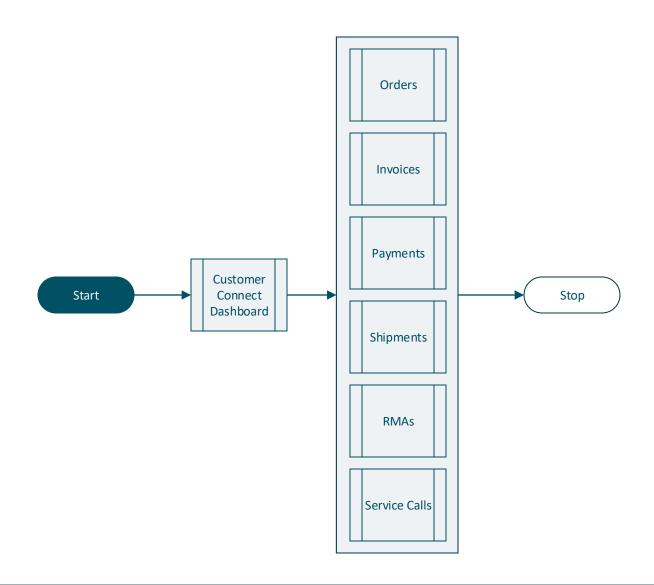
CUSTOMER CONNECT





FUNCTION MENU STAGE: Customer History

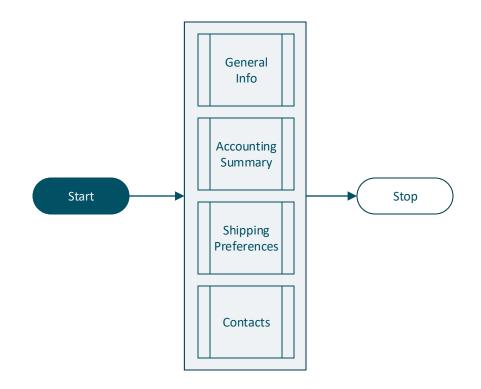
CUSTOMER CONNECT





STAGE: Customer Account

CUSTOMER CONNECT





FUNCTION MENU STAGE: Product Search

CUSTOMER CONNECT

