

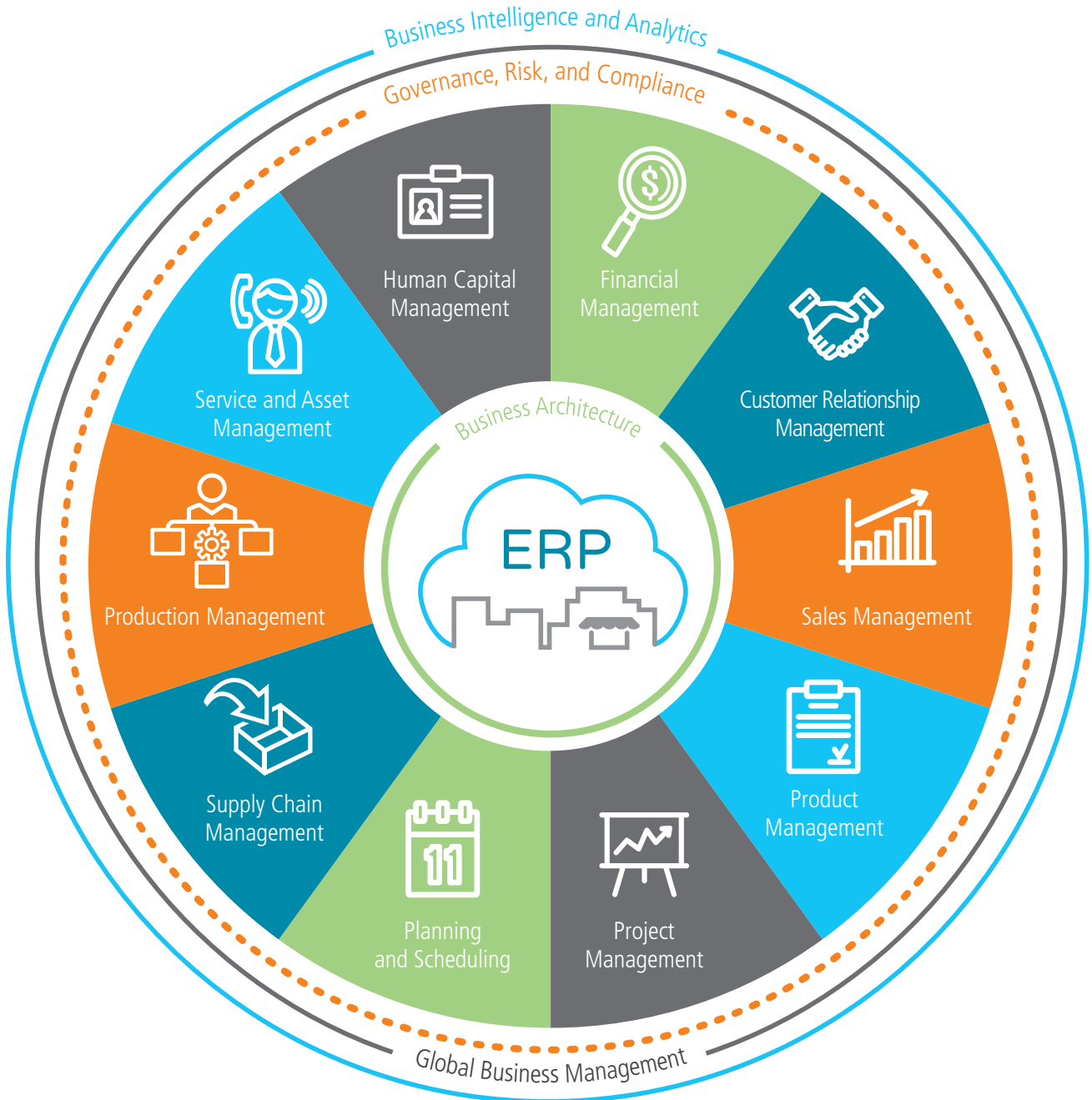


Epicor® Enterprise  
Resource Planning

# Sales Management

**EPICOR®**

# Epicor ERP Diagram





## Sales Management



- ▶ Estimating and Quotation Management
- ▶ Order Management
- ▶ EDI/Demand Management
- ▶ Point of Sale
- ▶ Commerce Connect
- ▶ Customer Connect

The Epicor Sales Management module delivers a comprehensive suite that enables you to produce accurate estimates, streamline your order-to-cash cycle, and fulfill perfect orders that ensure world-class customer satisfaction. Epicor Sales Management automates and improves labor-intensive processes for quoting, proposal generation, configuration, and order entry—enabling you to improve sales productivity by increasing accuracy during the quote and order process and identifying the right solution to meet customers' needs.



## Estimating and Quotation Management

Easily generate and track all customer or prospect requests for quotation (RFQs)—from the time of receipt until an order is placed. Create estimates and get quotes out more quickly with more accurate pricing and lead times with a wide range of powerful tools.

## Estimating Management

Generate estimates easily utilizing the tree interface to drag-and-drop components, operations or materials from another quote, Bill of Materials (BOM) or previous job. Pull same-as-except type parts into the estimate, then modify them quickly and easily to create a new one. Calculate material, subcontract, labor, and burden costs for multiple quantities of a part. Perform realistic cost estimating with the ability to add any special charges (e.g., tooling or design), minimum lot charges, price breaks, and scrap factors on materials and subcontracting. Specify and store individual markups for material class, subcontracting, operations, and special costs. Create RFQ requests to trigger buyers to solicit suppliers for pricing of materials required in the estimating process. Review responses once submitted for inclusion in the estimate. When the order arrives, punch a few keys and the detailed routing will be ready to go to the floor or to make additional changes.

## Social Estimating

Connect with engineers and other subject matter experts from the field. Epicor Social Enterprise helps to drive more accurate and timely estimates by enabling engineers to be part of a group that sales and estimators can collaborate with electronically. Share knowledge and discuss best options for customers leveraging up-to-date ERP information.

## Quotation Management

Manage the sales cycle with dynamic task lists that ensure the right people are working on the quote at the right time. Use the Part Advisor to drill down into the quote/job/ part status and history to answer critical questions related to a part:

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

Instantly query summary and detailed information on an estimate/quote. Check inventory availability and easily cross-reference customer part numbers to your part numbers automatically during the quoting process. Send quotes to prospects, even if they don't exist in the customer file. Quotation management capabilities include;

- ▶ Standard Routings
- ▶ Drag-And-Drop Interface
- ▶ Realistic cost estimates with minimum lot charges, price breaks, and scrap factors on materials and subcontracting
- ▶ Inventory Availability
- ▶ Request Supplier RFQ
- ▶ Markups by Category

## Pipeline Management

Accurately predict pipeline activity by tracking the confidence levels (e.g., best, worst, most likely) by quote line with the ability to perform management overrides to optimize forecast accuracy. Track all competitors to find out where you are winning and why you may be losing.

## Order/Job Integration

Increase efficiency and accuracy with the ability to quickly transfer quote information to a sales order or job. Built with tremendous flexibility, there are multiple ways to process an order and job from an existing quote such as:

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

## Order Management

Order Management drives the Epicor system. From the time an order is entered, its progress is tracked through final shipment, producing perfect order fulfillment on demand for maximum customer satisfaction. The Order Job Wizard generates appropriate jobs for new orders in a single step that enables the user to create, plan, schedule, and release jobs against multiple lines and multiple releases. Effectively manage orders with the ability to apply order-based discounts on an order value or product quantity basis. Optionally override and lock pricing. Check customer credit status online at quote entry, order entry, and shipment entry. Using blanket orders establish multiple releases (either firm or not firm) for each sales order line and pull parts directly from inventory. Optionally lock the order line quantity allowing new

releases to decrement the final delivery quantity on the final delivery date, keeping the total line quantity in balance with the release. Simplify repeat orders with the Copy Order function including the ability to optionally build a new order from history or see previous orders and enter the quantity on the order form. Use Available-To-Promise to view running balances during order entry. Enter a quantity, and the system will find the earliest date that quantity will be available. Enter a date, and see how many parts are available on that day. Counter Sales allow you to automate the pick-up, shipment, and generation of sales invoices for walk-in customers. Additional capabilities include;

- ▶ Tax calculations and fields are available at the sales order, line, and release levels.
- ▶ Application for payment may be required from a different customer than the customer order/receiving the goods or bill third-parties, such as a customer of your distributor.
- ▶ Manage sales commission calculations for direct and indirect sales teams. Allocate commission percentage over multiple sales entities per order line.
- ▶ Generate customer, product group, warehouse, and products specific pricing hierarchies, while matching the end-user currency. For global enterprises, company, plant, and warehouse pricing offers flexibility in pricing products.
- ▶ Enter unlimited miscellaneous charges or credits on each order header or order line. These charges will then print on the order and carry over to invoicing.
- ▶ Link sales orders to Projects.

(See Figure 2)

## Sales Kits

Flexibility in selling items in kits includes configured item kits, optional price rollup and item substitution, mandatory ship complete, and optional printing of kit components on the packing slip and invoice. Use the answers from the kit master to “on the fly” configure individual kit components, automating kit instructions for features like style, color, and size. Configure a Kit within

Line	MfgJobType	Part	Rev	Part Description	Order Quantity	UOM	Order Qty
1	Manufactured	DCD-300-OR		Steel O-Ring	1,000.00	EA	1,000.00
2	Manufactured	DSS-1000	A	DSS Satellite Ass	40.00	EA	40.00

**Figure 2** Order Management—Manage sophisticated sales requirement—from the time an order is entered until final shipment.

a Kit functionality support the ability to define multilevel configured sales kits that include non-stock components generated on a job or purchased direct for the kit, alongside stocked components.

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

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

## Capable-To-Promise

Provide accurate, real-time delivery dates to customers when using Advanced Planning and Scheduling (APS). Furnish a realistic promise date to your customer by finding out how a quote would fit into your current schedule. For multilevel structured products, Capable-To-Promise can be configured to create the sublevel assembly structures in addition to the top level assembly.

## Fulfillment and Allocation Processing

Use the Fulfillment Workbench for allocation or reservation and distribution processing, and plan for sales, transfers and job order types. Various fulfillment techniques, such as pick and pack, console-driven, and pre-pack processes may be performed through the use of templates to automate the fulfillment process. Hard allocation to finite level, versus reservations processing, may be launched directly from the order, line, and release areas as well. In conjunction with the fulfillment process, cross-docking provides the ability to directly link future inbound supply of items from purchase orders or jobs directly to demand from sales orders, transfer orders, or jobs. When the cross-docked items are received, they are immediately directed to the demand they are linked to, minimizing the time and task to fulfill the order or job.

## Order Shipment Parameters

With Order Management, all orders and change orders will be effectively managed online, perfecting the order-to-delivery process for maximum customer satisfaction. Set up the appropriate shipping parameters including the ability to manage;

- ▶ Track multiple ship-to addresses per order release.
- ▶ Ship an order from multiple plants and multiple warehouses.
- ▶ Do a one-time shipment to an address in Order Entry.
- ▶ Drop Ship and Buy to Order provides the ability from within a sales order to define a part as being "Buy-to-Order. This may or may not be defined as a drop ship item. In both cases, the purchase order will be linked to the sales order directly.
- ▶ Automatically create backorders for lines shipped incomplete. Flexibility enables customer-specific backorder parameters for complete order lines or complete orders to be set.

### Credit Card Processing

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

### Order Monitoring

Use order tracker to see a summarized view of the order, drill down on selected items to see greater details (e.g. lines, releases, shipments, charges, bookings, audit, and payment information). Monitor and track changes to orders using Social Enterprise. Easily subscribe to notifications about changes to orders without building Business Process Management (BPM) controls. View a summary of all the changes to the order in an activity stream inside or outside Epicor ERP or receive social media style updates via Email or directly in your browser.

## EDI/Demand Management

Today, all suppliers large and small are facing increased expectations from their customers to have systems in place for immediate response to changes in their demand such as forecast and shipping schedule changes. Epicor EDI/Demand Management secures your competitive edge by incorporating electronic data interchange (EDI) with demand scheduling. The EDI/Demand Management framework leverages the SOA business architecture of Epicor ERP and deep industry experience in EDI to lower the cost of EDI deployment. The framework provides full flexibility and control for setting up customer contracts and handling their schedules once inside the Epicor ERP system, whether entered manually in Demand Management or contained in EDI messages. This helps your company reduce lead time and effort for planning and procurement, thus enabling you to respond on the production floor faster. A wide range of EDI implementation choices are available to match your company's needs, making it possible to preserve much of your investment in EDI setup and existing staff.

### Demand Management

A component of the embedded EDI/Demand Management module, Demand Management starts with a "contract" set up per customer with such agreed-upon parameters as pricing, initial demand schedule, and contract end date. The contract is then linked to incoming purchase orders, forecasts, and shipping schedules. These contracts can be managed, and schedules produced, automatically with set periodicities or schedule constraints that match each customer's unique shipping needs. Additionally, as changes happen, the schedules can be updated, and changes matched to existing sales orders, which are then updated accordingly. You can use Demand Management without EDI, and if EDI is deployed, your customers' electronic demand changes are brought in automatically for system review and

acceptance into sales orders or forecasts in your Epicor ERP system, according to parameters and tolerances you specify. This is especially important for companies doing business in automotive as well as other industries such as industrial, consumer products, retail, and aerospace and defense. Demand Management capabilities include;

- ▶ Demand Contract structure provides the ability to have many sales orders/ lines attached to the contract.
- ▶ Demand Entry Management Console supports one inbound purchase order at a time, or options can be tuned for more automated entry into the Epicor ERP system.
- ▶ Establish demand settings per trading partner to include tolerances, such as for allowable time windows when schedule lines can be added or deleted or changed, tolerances for price variations, parameters for matching changes against existing sales orders, and functions for reconciling shipped quantities between you and your trading partner. Automated Demand Management processing can be set to always process in spite of tolerance errors, process with warnings, or stop when an error is encountered.
- ▶ Use Demand Mass Review to manually match incoming forecast and shipping schedule changes to existing forecasts and sales order lines in the Epicor ERP System. Configurable matching algorithms help to speed up the matching process.
- ▶ Manually generate sales order release schedules based on defaulted customer periodicity (interval setup) and release quantity. Automatically close rejected schedules from the customer record.
- ▶ Review balances as well as proposed quantity of proposed schedule.
- ▶ Manage and reconcile the cumulative shipped quantity. Validate cumulative quantity discrepancies by customer and choose to "Stop" or "Warn" and then allow the received demand to be turned into a valid sales order—this

- ▶ feature includes Cumulative Variances Reporting. The Demand Reconciliation screen helps in the cumulative matching process with the ability to easily make reconciled quantity adjustments. Cumulative quantities are tracked at the order and shipment levels over the life of the contract.
- ▶ Schedule forecasted deliveries that can be utilized with MRP to predict demand for resources and provide guidance on pending demand for materials.
- ▶ Periodicity (Interval Setup) - Specify rules by plant or plant/supplier for automatic purchase schedule suggestions. Periodicity rules can be specified as Daily, Monthly Forward, Weekly Forward, and Nth Day of Week.
- ▶ Capable-to-Promise - Set up the system to review open contracts and capacity requirements for a product and automatically adjust the new demand requirements after reviewing against open contracts as well as available capacity.
- ▶ Support for Allowance and Charge Codes - Optionally receive and process allowances and miscellaneous charges within EDI transmissions from trading partners. Both flat amounts and percentage based charges are available.
- ▶ Automated Order Match Validation - Automatically cancel demand releases received that are not matched to a specific order release.
- ▶ Close and Process Schedules - Use a single step to automatically close and process all schedules within Demand Management.
- ▶ Contract Start and End - Manage contracts effectively with contract start and end date.

## EDI Standard Transactions

The Epicor ERP system framework readily supports the following listed standard ANSI X12 and EDIFACT documents. Many more are available from the Epicor EDI Solutions Team, who are experienced in making EDI work in various environments and can offer enhanced functionality that is tailored to

the EDI needs of your business. For example;

### Inbound Documents

- ▶ Purchase Order (ORDERS, 850)
- ▶ Planning Schedule (DELFOR, 830)
- ▶ Shipping Schedule (DELJIT, 862)
- ▶ Change Order (ORDCHG, 860)

### Outbound Documents

- ▶ Purchase Order Acknowledgement (ORDRSP, 855)
  - ▶ Advanced Ship Notice (DESADV, 856)
  - ▶ Invoice (INVOIC, 810)
  - ▶ Purchase Order Change Acknowledgement (865)
- (See figure 2.1)

## Point of Sale

Epicor Point of Sale (POS) extends the power of your Epicor ERP solution to a customer-facing sales environment—whether you're an organization with a single POS station or a large, multinational chain with hundreds of stores. Epicor POS provides a feature-rich system that empowers store personnel to provide an enhanced customer experience. Comprehensive functionality includes

electronic gift cards, gift receipting, customized receipt per transaction type, coupon redemption/issuance, layaways, special orders, suspend and resume, item marking for various functions, additional input fields, multicurrency, start/end of day functions, cash management, and more.

## Commerce Connect

The increasing proliferation of eCommerce likely means that more of your customers are looking online to solve their business problems, which means that providing customers with the ability to buy online from you is just a start. Your Web site must provide an experience that truly does solve problems, or better yet, inspires them in some way to keep coming back. Whether your Web site serves Business-to-Consumer (B2C), Business-to-Business (B2B), or both needs, it requires strong functionality and must use the latest technology to deliver customers the best possible online experience. Epicor Commerce Connect provides everything your Web site needs to deliver a rich customer experience, throughout the customer's entire order life cycle—from quote to fulfillment to service.

**Figure 2.1** EDI/Demand Management—Manage one inbound purchase order at a time, or options can be turned for more automated entry into the Epicor ERP system.

The key advantage of Epicor Commerce Connect (ECC) is its deep integration to Epicor ERP. Epicor Commerce Connect negates much of the risk that goes with using a nonintegrated eCommerce solution by getting all of its information direct from Epicor ERP. All transactional data flows seamlessly between Epicor Commerce Connect and Epicor ERP: product information, customer specific pricing, inventory levels, and more, can be viewed online via Epicor Commerce Connect. While many companies can provide eCommerce services, very few are able to deliver the value and rapid results the way that Epicor Commerce Connect can.

### A Modular Approach to a Better Web site

Whether you are selling to the general public, or to other businesses, Epicor Commerce Connect has been designed to help you provide all visitors to your site(s) with the same high levels of user experience they have come to expect in today's online environment. Browsing tools such as configurable search, suggested items and automatically updated listings of popular products on your site are able to help your customers very quickly get to the items they wish to purchase, while at the same time ensuring that they are exposed to as much of your product range as possible—in ways that are relevant and tailored to customer interests.

You can also provide tools to help your customers make better purchasing decisions including the ability for customers;

- ▶ To see related products
- ▶ Compare different products
- ▶ View the product up close using the product image zoom-in capability.

Tools such as these allow the customer to make better purchase decisions, which in turn lead to much higher levels of customer satisfaction and a lower rate of product returns.

### Configurator

Many businesses sell products that can be customized - for example by color, size, material and much more. With products such as these, the number of possible combinations the customer could choose can rapidly rise to the thousands, or more. To help manage this complexity, Epicor Commerce Connect includes a configurator module that provides a fast and efficient mechanism to display all product options on one page—allowing your customers to simply and easily choose their own product specifications without the stress of having to navigate through multiple different pages to find the combination that best meets their needs.

Fully integrated with Commerce Connect, Epicor Product Configurator enables Web-based configurations that can be used for quoting and pricing within the

Epicor Commerce Connect solution.

Once configurations are accepted by your customer, the instant flow to Epicor ERP enables not only price, but also product build to be delivered for more rapid response to new orders. Use the robust configuration capabilities and extend them to your customers and channel to ensure that customer requirements are met. Parametric capabilities enable visual confirmation of configuration results.

### Customer Connect

The Epicor Customer Connect portal provides interactive, customer-facing content over the web. Today's customers want new access to information. Being able to view special promotions and pricelists, make repeat purchases, and pay on account are standards to improved customer loyalty and online commerce.

(See figure 2.2)



**Figure 2.2** Customer Connect—Always a click away, Epicor Customer Connect gives B2B customers access to account-specific information—directly from your website. Whether ordering a replacement part or checking on the status of a shipment or payment history, Customer Connect extends your level of service to customers.

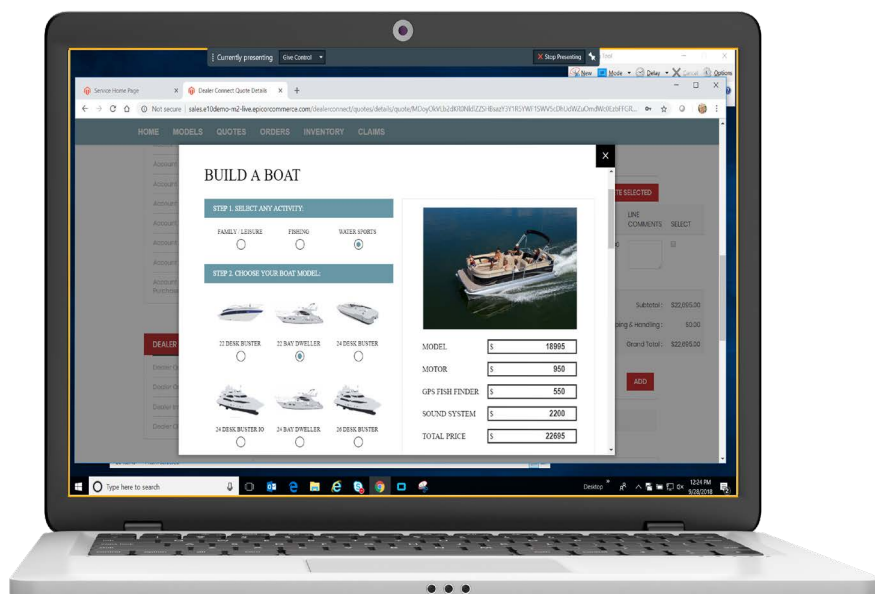


## Dealer Network Portal

Epicor Dealer Network Portal is an innovative enterprise solution designed for manufacturers who sell or service products through dealers. Powered by Epicor Commerce Connect (ECC) and tightly integrated with your Epicor ERP system, Epicor Dealer Network Portal creates a modern online experience for your dealers to rapidly configure, price, and quote orders, as well as manage service and warranty needs for your products.

By capturing all dealer activity through a single easy-to-use portal, you establish a single thread of data that connects all transactions at the dealer with your back-end ERP. You gain full visibility into the business making it simpler for dealers, which enables you to drive business growth as a preferred innovative brand.

(See figure 2.3)



**Figure 2.3** Dealer Network Portal—Capture all dealer activity through a single, easy to use portal.

## About Epicor

Epicor Software Corporation drives business growth. We provide flexible, industry-specific software designed to fit the precise needs of our manufacturing, distribution, retail, and service industry customers. More than 45 years of experience with our customers' unique business processes and operational requirements are built into every solution—in the cloud or on premises. With this deep understanding of your industry, Epicor solutions dramatically improve performance and profitability while easing complexity so you can focus on growth. For more information, [connect with Epicor](#) or visit [www.epicor.com](http://www.epicor.com).

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