

EPICOR

# Supply Chain Management







## Human Capital Management

- Core HR
- Global HR
- Candidate Self-Service
- Employee Self-Service
- Talent Management
- Training and Development
- Position Control
- Timesheets



## Service and Asset Management

- Service Management
- Returned Material Authorization
- Service Contract and Warranty Management
- Case Management
- Maintenance Management
- Field Service Management



## Production Management

- Job Management
- Advanced Production
- Kanban Lean Production
- Data Collection
- Advanced MES
- Quality Assurance
- Quality Management System



## Supply Chain Management

- Purchase Management
- Supplier Relationship Management
- Supplier Portal
- Inventory Management
- Advanced Material Management
- Advanced Unit of Measure
- Shipping and Receiving
- Quick Ship
- Warehouse Management
- Supplier EDI and B2B Integration



## Planning and Scheduling

- Forecasting
- Master Production Scheduling
- Smart Demand Planning
- Material Requirements Planning
- Scheduling and Resource Management
- Advanced Planning and Scheduling
- Infinite, Finite, and Constraint-Based Scheduling



## Financial Management

- Global Engines
- General Ledger
- Accounts Receivable
- Accounts Payable
- Tax Automation
- Financial Planning and Analysis
- Financial Reporting
- Credit Card Payments
- Cash Management
- Credit and Collections
- Asset Management



## Customer Relationship Management

- Contact Management
- Marketing Management
- Lead and Opportunity Management
- Case Management
- CRM Mobile
- Integration to Salesforce.com®



## Sales Management

- Estimate and Quote Management
- Order Management
- Sales Order Automation
- EDI/Demand Management-Point of Sale
- Commerce Connect
- Dealer Network Portal
- Configure Price Quote



## Product Management

- Bill of Materials
- Routings
- Engineering Change and Revision Control
- Document Management
- CAD Integration
- Product Lifecycle Management
- Product Costing
- Product Configuration



## Project Management

- Project Planning and Analysis
- Project Generation
- Project Billing
- Resource Management
- Contract Management
- Planning Contract
- Time Management
- Expense Management
- Advanced Project Management



## Governance, Risk, and Compliance

- Corporate Governance
- Risk Management
- Security Management
- Business Process Management
- Global Trade Compliance
- Electronic Reports Engine
- Environmental and Energy Management



## Cloud Business Platform

- Mobile, Browser-based Experience
- Virtual Agent
- Collaborate
- Enterprise Search
- Epicor Learning
- Business Process Management
- Enterprise Content Management
- Business Workflow Automation
- IoT and IIoT Applications
- eCommerce Platform
- EDI and B2B Integration
- Electronic Reports Engine
- Application Studio Configuration
- REST Services and Epicor Functions
- Updatable Dashboards
- Epicor Integration Cloud
- Deployment Flexibility
- Microsoft Azure Cloud
- Security Management



## Business Intelligence and Analytics

- Operational Reports/Dashboards/IIoT/OEE
- Descriptive Analytics (Business and Financial User Reporting/Dashboards)
- Diagnostic Analytics (Scorecards/KPIs, Financial Planning)
- Predictive Analytics (Forecasting)
- Data Warehousing
- Role-Based Analytics and Business Intelligence
- Mobile Business Intelligence



## Global Business Management

- Multicompany Management
- Multicurrency Management
- Global Multisite Management
- Multilingual Data Management
- Master Data Management
- Scalable, Distributed Deployment
- Global Engines

# Contents

Purchase Management .....	6
Purchase Contracts .....	6
Advanced Requisition Management .....	6
Supplier Connect.....	6
Supplier Relationship Management.....	7
Epicor Supplier Portal .....	7
Inventory Management.....	7
Shipping and Receiving .....	8
Quick Ship.....	8
Warehouse Management .....	9
Smart Inventory Planning and Optimization.....	10
Advanced Unit of Measure .....	10
Advanced Material Management.....	10
Wireless Warehouse .....	10

- Purchase Management
- Advanced Requisition Management
- Supplier Connect
- Supplier Relationship Management
- Inventory Management
- Advanced Material Management
- Advanced Unit of Measure
- Shipping and Receiving
- Quick Ship
- Warehouse Management
- Supplier EDI and B2B

A highly effective supply chain is critical to the success of your strategic growth initiatives. Top-performing manufacturers are empowering supply chain processes with innovative technology that is best-fit for unique operational needs, easy to use, and informed by industry best practices. Drive out costs, increase velocity, and enhance your customer experience with a strong supply chain that is ready for the future of manufacturing. Offering rich visibility and digital prowess, Epicor provides effective coordination from initial raw materials to the ultimate delivery of the finished product, transforming your supply chain into a results-driven value chain.

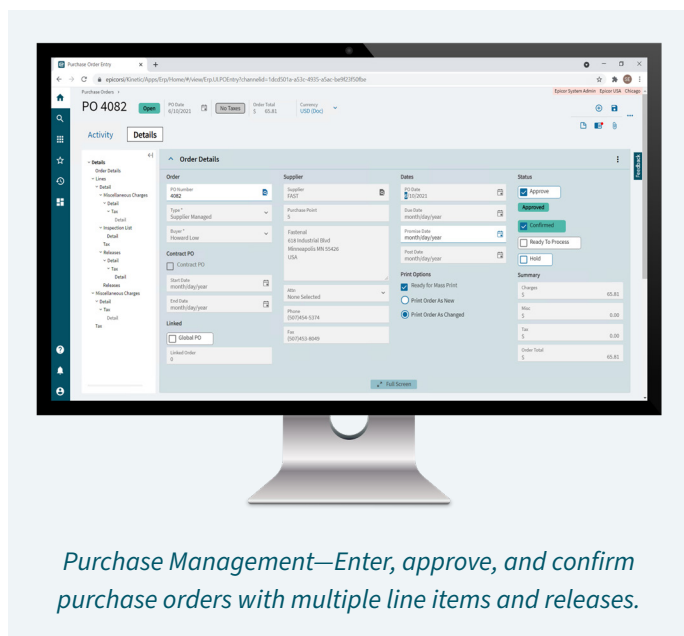
Supply Chain Management (SCM) is a full suite of enterprise application capabilities—including purchase management, sourcing and procurement, inventory management, advanced material management, shipping and receiving, and warehouse management—and is complemented by forecasting, order management, and analytics capabilities. Combined, you have the solution you need to meet—and even exceed—customer expectations in today's increasingly global market place.

## Purchase Management

Purchase Management handles purchase order writing and the tracking of supplier performance to optimize results and improve negotiations. Multiple detailed line items indicate planned receipts to inventory or a job, direct receipts to a sales order, or direct receipts to a manufacturing job, although their destination may be changed at the time of actual receipt entry. Purchase order receipt processing updates suggested supplier and detailed purchase history files, which provides continual reference to aid in making purchasing decisions. With Purchase Management, you can reduce inventory levels, improve on-time deliveries, enhance your cash flow, and help increase your profit levels.

Purchase Management capabilities include:

- Automated purchasing tools
- Supplier cross-referencing
- Supplier approval capability
- Mass purchase order receipt
- Multiple location receipts
- Part master price breaks
- Purchase requisition
- Purchase history
- Purchase order tracker
- Supplier tracker



*Purchase Management—Enter, approve, and confirm purchase orders with multiple line items and releases.*

## Purchase Contracts

Purchase Contracts is designed to automate the process of purchasing inventory items on a recurring basis—including the establishment of recurring delivery schedules. Contract line items can be assigned to purchase orders, which automates your delivery

schedules with delivery dates, prices, and corresponding quantities. Automatic requirement calculations—based on generated PO suggestions—are factored into delivery schedules, which you can adjust automatically to conform to supplier requirements or help with inventory control, production efficiency, and business expediency. Complete functionality includes part schedule maintenance for establishing the combination of part, plant, and calendar that makes up the part schedule, as well as periodicity code maintenance to establish the rules and terms under which orders periodically arrive from suppliers.

## Advanced Requisition Management

High-performing supply chains maintain a budget and control over items requisitioned for each stocking location for greater efficiency. Advanced Requisition Management (ARM) enables organizations to gain visibility and regulate procurement spending by providing an online workflow and purchase requisition tool. It gains information on spending to support negotiation of bulk purchase discounts from suppliers, assigns preferred suppliers for particular products, sets the right spend limits for individuals, and assigns the chain of authority for approving purchase orders.

## Supplier Connect

Strengthen your competitiveness by offering customers and business partners the ability to interact with your brand online. Supplier Connect or Supplier Portal is a supply-chain-focused feature of Commerce Connect—a complete, connected, and customer-proven business solution for modern digital commerce and omnichannel enablement commerce and omnichannel enablement. By providing the means for customer and supplier self-service on a whole range of inquiries—such as open orders, part information, and access to old invoices—Commerce Connect eliminates the need for inquiries to come in via email, phone, or fax to significantly reduce the amount of time staff need to spend answering them.

Supplier Connect is specifically tailored for suppliers to update their information via their own supplier portal, answer requests for information, and confirm changes to purchasing orders. It can deliver performance metrics and also allows user-defined fields to flexibly extend your data storage options and send custom messages between your online store-front and your centralized back-office. This not only provides for a more seamless relationship between you and your suppliers, but it also allows for your business to react much more quickly and accurately to any change of circumstances with supply.

## Supplier Relationship Management

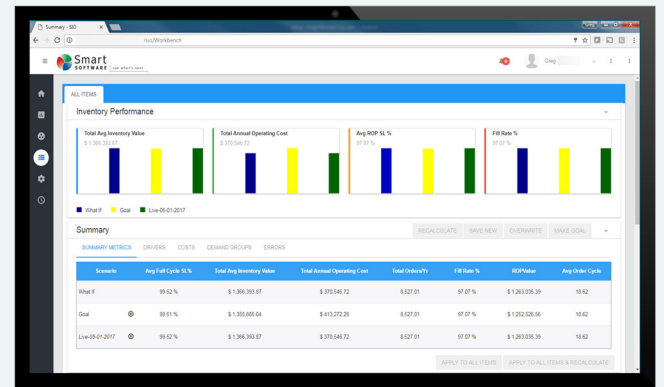
Supplier Relationship Management (SRM) provides tools for buyers, procurement staff, and purchasing agents, to request quotes for raw materials or subcontract services from one or multiple suppliers. Request for quotes (RFQs) are generated with one or more lines, allowing you to evaluate the responses from suppliers to decide which businesses can provide your company with the quantities, price points, and delivery dates you need for your manufacturing and servicing business flow.

Supplier RFQ responses automatically build or add to existing part price-break tables with current effectivity dates to be used in other Epicor applications.

### Epicor Supplier Portal

Integrates your suppliers with your Kinetic solution quickly and seamlessly. It provides either an integration solution (for suppliers who can connect to you) or a web portal (for suppliers who can't) through which you and your suppliers can communicate in an easy-to-understand, human-readable format — not 'EDI speak'. You can view documents and status information about sourcing requests and graphical charts that provide insights into EDI data.

These web-based analytics present supply chain activity and alert you to unexpected or non-compliant supplier actions. You'll have real-time visibility into orders, carriers and warehouses so your team can respond to supply chain breaks immediately.



*Epicor Smart Inventory Optimization —  
Easily visualize your inventory performance  
reports and share with key stakeholders*

**Note:** Refer to the “Cloud Business Architecture” chapter for more information about the Epicor EDI solution for EDI and B2B integration.

## Inventory Management

Inventory Management provides the key functions necessary to update and maintain raw materials, work in process (WIP), finished goods inventory quantities, costs, and on-hand requirements. Issued inventory reduces quantities on hand, which are continually replenished through the processing of purchased or manufactured item receipts into inventory. Receipt processing provides a continual update of inventory average, FIFO, lot, or last costs for every item. A variety of screen inquiries provide management analysis of Materials Requirements Planning (MRP), shortage monitoring, reorder analysis, stock status, valuation, and critical items.

Functionality also includes:

- Alternate parts maintenance
- Costing management
- Country of origin tracking
- Cycle counting
- Global trade standards
- Manufacturers part
- Part cross-referencing
- Part master price breaks
- Physical and perpetual inventory
- RoHS compliance
- Time-phased material inquiry/report
- Unit of measure definitions

## Package Control

Package Control functionality allows you to track, manage, or transact a group of items via a unique identifier, the Package Control ID (PCID). Track any item from receipt into a site, the movement of an item throughout the site, the shipment or transfer of that item to another site, and eventually the shipment of that item to the customer.

Also supporting the inbound generation of PCIDs, Kinetic allows you to reserve and allocate PCIDs for sales orders, issue material to jobs, produce PCIDs from jobs, transfer PCIDs from one site to another, and receive PCID finished goods in inventory to complete processing transactions. Perform pick and unpick transactions, shipping transactions, and job receipt to inventory transactions—among others—against a unique PCID.

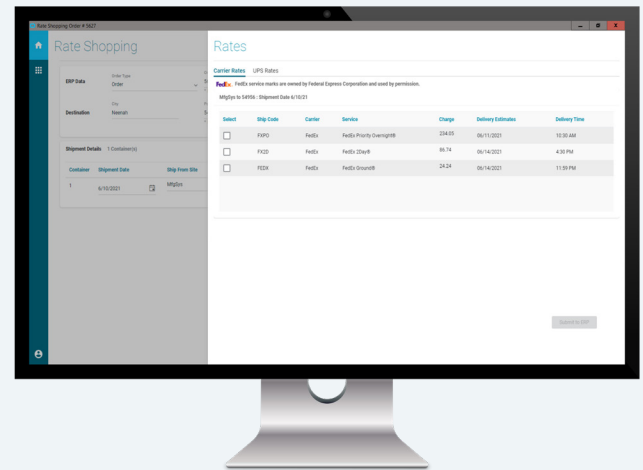
PCIDs have an associated set of predetermined or user-defined physical and controlling characteristics, which comprise the package itself (properties and contents) and the label. Each can have its own rules of control, process flow, and status to give you greater control and visibility into your supply chain.

## Shipping and Receiving

The Shipping and Receiving module is designed to promote increased efficiency and accuracy by allowing you to perform and track all activity relating to shipments and receipts. This flexible module gives you the ability to auto-invoice in Accounts Receivable following customer shipment; print customizable bill of lading forms to your shipments; track container shipments and update the status and due dates of all purchase orders; track customer shipments; track landed costs against applicable parts, which reflects the true costs of materials, parts, or finished goods, and more.

Complete functionality also includes:

- Mass ship
- Subcontract parts tracking
- Miscellaneous shipment tracking
- Miscellaneous receipts management
- Pack and ship/pack out processing
- Master pack tracking
- Phantom pack shipping
- Shipping performance reporting



*Quick Ship—Quick Ship simplifies freighting and shipment to customer specifications.*

## Quick Ship

Today's customers have many different shipping options. Quick Ship, a multicarrier shipping software for Epicor Kinetic streamlines domestic and international shipping processes to help you meet your customers' demands. From rate shopping at order entry to manifesting your domestic or international shipments, Quick Ship communicates with various carriers and provides the information about that shipment back to the ERP platform. As part of the shipping function, Quick Ship prints labels, bill of ladings, and export documents to be included with your shipment.

Capabilities include:

- Support for multiple carriers / account numbers in one system
- Rate Shopping
- Data Mapping Tool
- Bill of Lading Generation
- Automated blind shipping
- Automated email notification
- Automated hazmat paperwork
- HazMat compliance software integration (DGIS)
- Best way and routing guide
- Consolidated shipments
- International shipments and documentation
- Print or email return labels
- Rate import tool for custom carriers
- Transfer orders

## Warehouse Management

The Epicor Warehouse Management System (WMS) leverages Kinetic, mobile ID data collection, and wireless communications to seamlessly link your warehouse with your order processing and manufacturing operations—optimizing your pick, pack, ship, and receiving processes.

Functionality includes:

- Bin management
- Warehouse team creation
- Fulfillment workbench
- Allocation template
- Wave picking
- Cross-dock tracking
- Paperless picking
- Queue management

## Lot Tracking and Attributes

Help improve supply chain efficiency with full visibility of parts by lot throughout your system. Record material received, keep traceable material on-hand, and maintain detailed usage information by lot with the option to auto-generate lot numbers based on part-specific rules. Additional lot attributes can also be stored for each part lot, which include Batch, Manufacture Lot, Heat Number, Manufacture Date, Expiration Date, Firmware Version, Cure Date, Best Before Date, etc.

## Serial Tracking

Serial tracking helps to ensure product traceability, allowing for greater control over parts within the facility. Comprehensive functionality ranges from no serial tracking to full serial traceability of each recorded move of a part and its components.

Optionally, you can record serial numbers at the outbound stage only. This is particularly useful for companies that must record what serial numbers have been shipped to which customers and when, but have no need to undertake the overhead costs of recording serial numbers as inventory moves around the warehouse or internal production facilities.

## Customer-Managed Inventory

Lower business risk by enhancing control over customer-managed inventory that you store but never own. These items can be used in the production of products for a customer or shipped by you directly to your customer's customer.

## Supplier-Managed Inventory

Supply Chain Management allows you to designate material purchased as inventory you are storing as consignment inventory from the supplier. You can also use these part quantities on jobs, and once you consume it, your company legally owns the items.



## Smart Inventory Planning and Optimization

Smart Inventory Planning and Optimization is a cloud-based reporting platform for demand planning, inventory optimization, and supply chain analytics that helps drive sales and inventory operations planning.

The platform offers a convergence of robust forecasting methodologies, optimization techniques, and consensus demand and inventory planning, delivered via an easy to use web interface accessible through any browser. For more details check the Business Intelligence Section.

## Advanced Unit of Measure

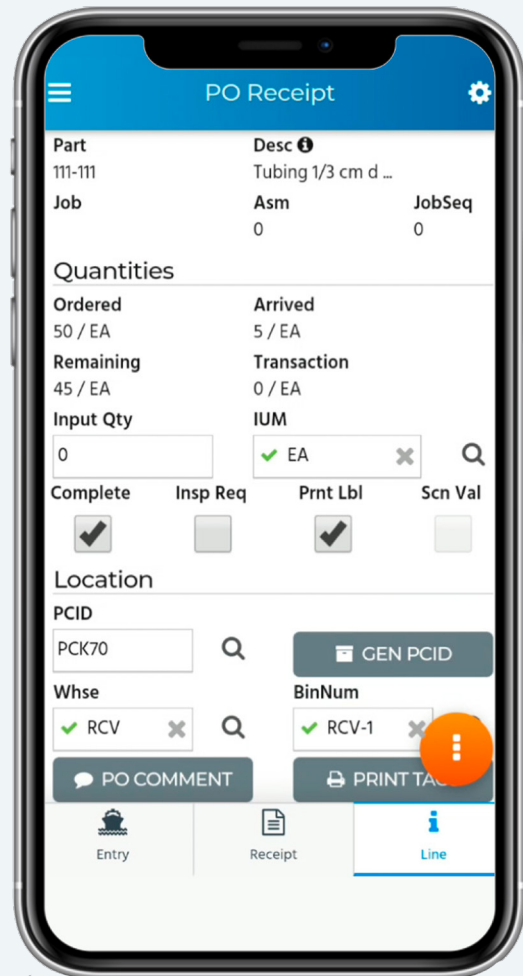
Selling items with many dimensional attributes can be complex and make it difficult to implement ERP. For these manufacturers and distributors, Epicor offers Advanced Unit of Measure (UOM) capabilities that reduced the complexity of implementation by reducing the amount of configuration needed to fit these unique needs. The benefit of Epicor Advanced UOM functionality is that it delivers a simplified approach to finding the right inventory by segmenting inventory with inventory attributes such as hardness, strength, modulus of elasticity, or density. Because the inventory is segmented, it is easily located, physical counts are more meaningful, and the business can plan inventory needs at the attribute level, ensuring accurate supply and demand are met. Furthermore, Advanced UOM offers dynamic attributes to help businesses manage conversion between units of measure. For example, pounds or grams to feet, meters, or each. Both the theoretical size (4 meters length) and optional actual size (4.1 meters) can be converted to the accurate weight measures. This is powerful and useful in purchasing and selling in one unit of measure while managing inventory and production in another. Advanced UOM delivers these transactions in dual units of measure, giving greater visibility and accurate cost throughout with the simplicity of transacting in a number of pieces rather than counting out the weight or meters.

## Advanced Material Management

Advanced Material Management (AMM) enables businesses to produce electronic requests for materials, dispatch those materials, and track inventory movements of all inventory—including raw materials and work in process. Using wireless terminals and bar coding technology, you are able to track inventory in real time with complete control and visibility of raw materials and work in process as it travels throughout the enterprise.

Complete functionality includes:

- Bar coding on demand
- Material handler interface
- Material movement
- Order prioritization
- Sales order allocation
- Bar code tag scanning
- Handheld capability



*Wireless Warehouse application provides a modern and intuitive user experience on Android devices.*

## Wireless Warehouse

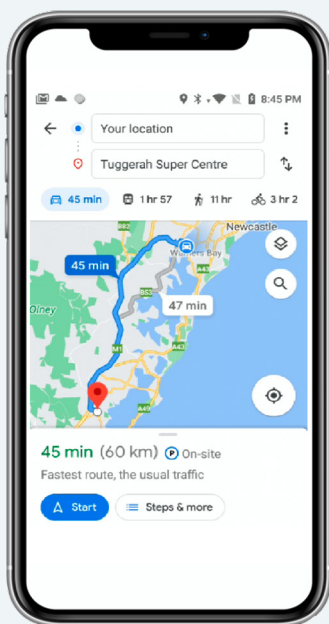
Wireless Warehouse is our handheld application which offers a modern, intuitive user interface for warehouse and distribution functions. The application optimizes workflow for fast and accurate scanning, improves time to process transactions, increases accuracy, and reduces errors. It is compatible with the latest scanning devices running on Android® 5 or higher from Honeywell® and Zebra®.

Capabilities include:

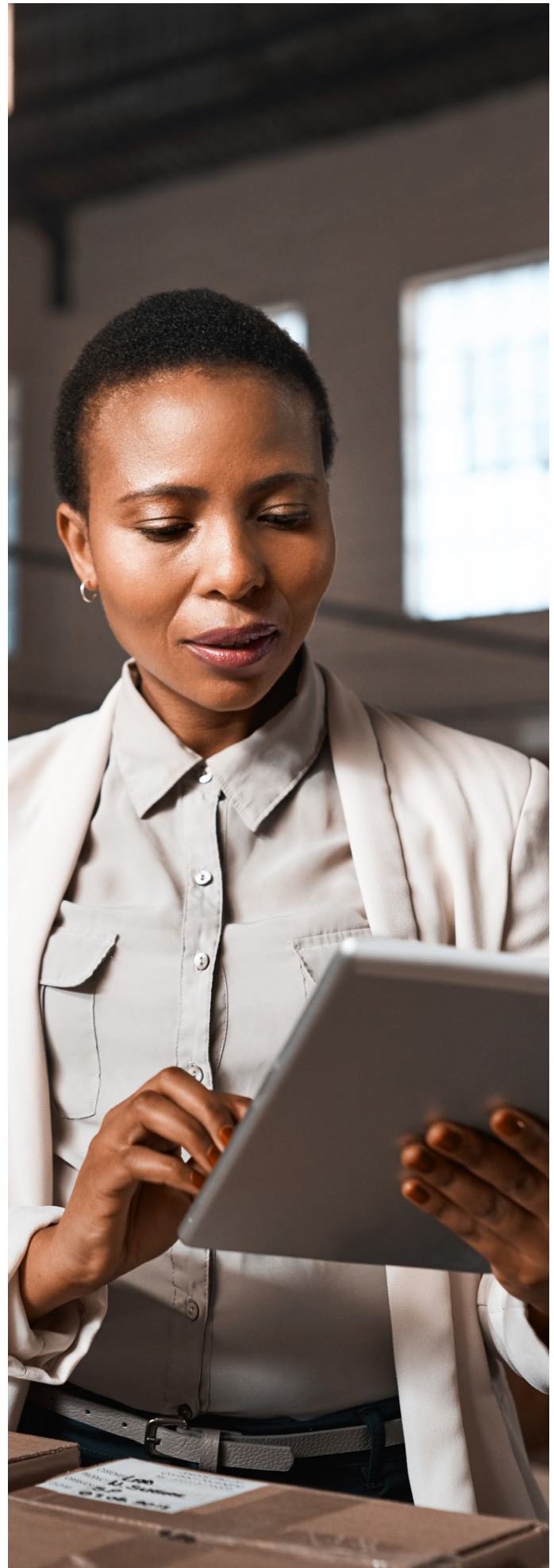
- Receiving of inbound containers, purchase orders, intercompany and transfer order receipts.
- Core warehousing functions allowing users to initiate adjustments and movements from the warehouse floor; conduct cycle counts, and stock takes.
- Picking of items assigned to a material queue, grab items from the available queue, or return items back to the queue.
- Unpicking of sales or transfer orders
- Automated workflows triggered by scan events.
- Complex sort and filter options
- Part and Bin level validation
- Configurable scan validation
- PCID management including builds, splits, and merging
- Processing of outbound shipments direct from the device.
- Paperless Proof of Delivery with sign-on glass signature and photo capture
- Delivery route optimization and navigation

### Proof of Delivery

For customers only requiring the paperless proof of delivery and delivery route navigation functions, a Proof of Delivery app is also available as a stand-alone subset of the Wireless Warehouse mobile app. In addition to Android devices, Proof of Delivery is also available for iOS devices and can be downloaded from both Google and Apple App stores.



*Productivity and Data Accuracy is increased for your delivery workforce with the Proof of Delivery mobile app.*





## EPICOR

We're here for the hard-working businesses that keep the world turning. They're the companies who make, deliver, and sell the things we all need. They trust Epicor to help them do business better. Their industries are our industries, and we understand them better than anyone. By working hand-in-hand with our customers, we get to know their business almost as well as they do. Our innovative solution sets are carefully curated to fit their needs, and built to respond flexibly to their fast-changing reality. We accelerate every customer's ambitions, whether to grow and transform, or simply become more productive and effective. That's what makes us the essential partners for the world's most essential businesses.

---

Contact Us Today: [info@algorithminc.com](mailto:info@algorithminc.com) | [www.algorithminc.com](http://www.algorithminc.com)

The contents of this document are for informational purposes only and are subject to change without notice. Epicor Software Corporation makes no guarantee, representations, or warranties with regard to the enclosed information and specifically disclaims, to the full extent of the law, any applicable implied warranties, such as fitness for a particular purpose, merchantability, satisfactory quality, or reasonable skill and care. This document and its contents, including the viewpoints, testimonials, dates, and functional content expressed herein are believed to be accurate as of its date of publication, November 8, 2021. Use of Epicor products and services are subject to a master customer or similar agreement. Usage of the solution(s) described in this document with other Epicor software or third-party products may require the purchase of licenses for such other products. Epicor and the Epicor logo are trademarks or registered trademarks of Epicor Software Corporation in the United States, and in certain other countries and/or the EU. Android is a trademark or registered trademark of Google LLC. IOS is a trademark or registered trademark of Cisco in the U.S. Honeywell is a trademark of Honeywell International Inc. Zebra is a trademark of Zebra Technologies Corp. Copyright © 2021 Epicor Software Corporation. All rights reserved.