

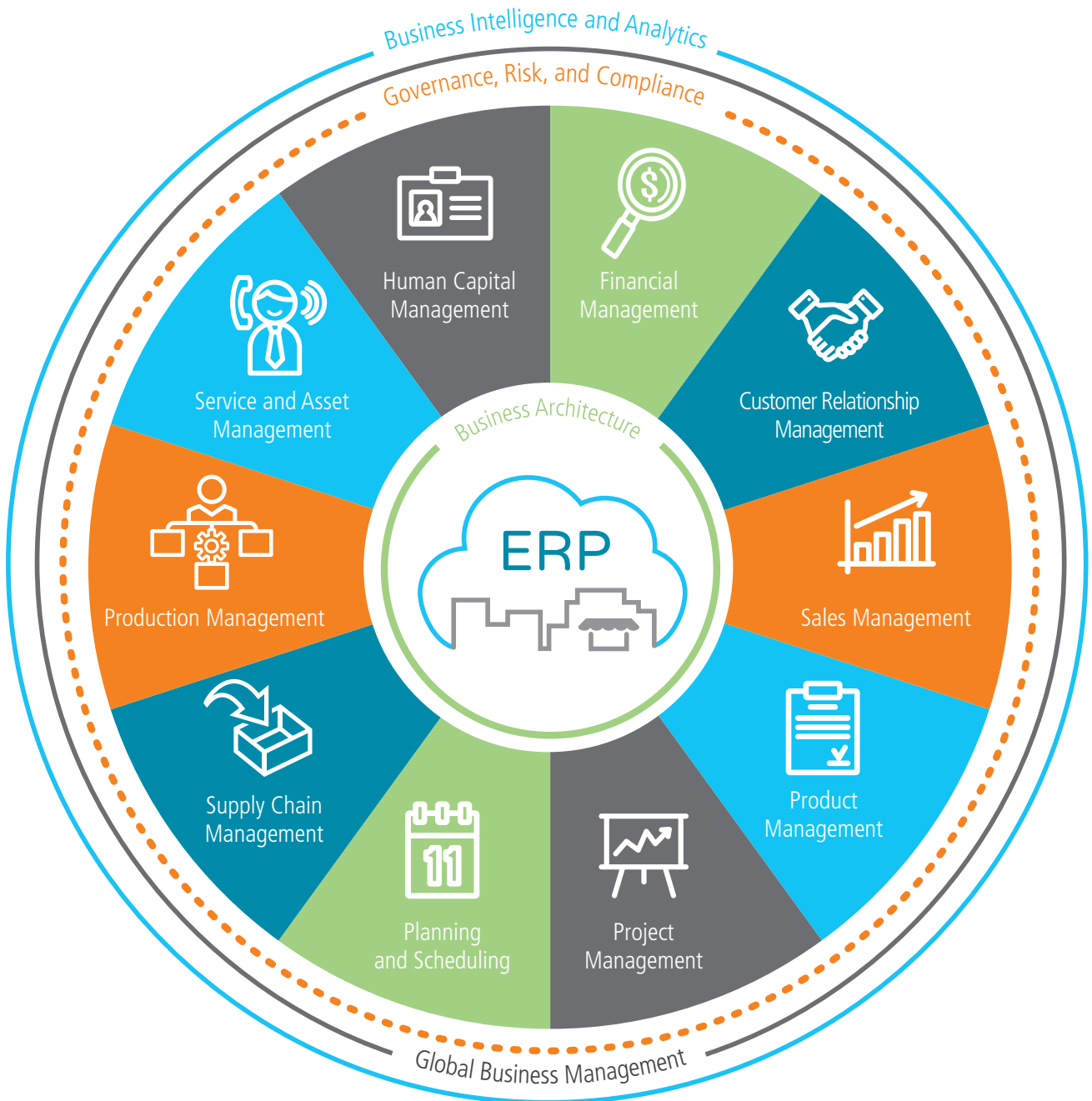


Epicor® Enterprise  
Resource Planning

Supply Chain  
Management

**EPICOR®**

# Epicor ERP Diagram





# Supply Chain Management



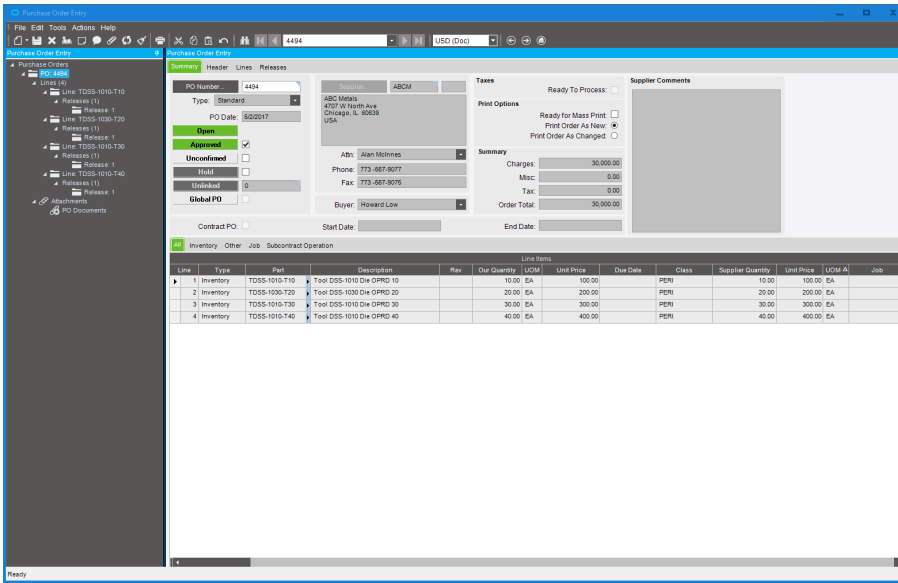
- ▶ Purchase Management
- ▶ Supplier Connect
- ▶ Supplier Relationship Management
- ▶ Inventory Management
- ▶ Advanced Material Management
- ▶ Manifesting and Freight Management
- ▶ Shipping and Receiving
- ▶ Warehouse Management
- ▶ Handheld

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.

Epicor 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.

## Advanced Requisition Management

High-performing supply chains maintain a budget and control over items requisitioned for each stocking location for greater efficiency. Epicor 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.



**Figure 6** Purchase Management—Enter, approve, and confirm purchase orders with multiple line items and releases.

## 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 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

(See figure 6)

## Purchase Contracts

Epicor 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.

## Supplier Connect

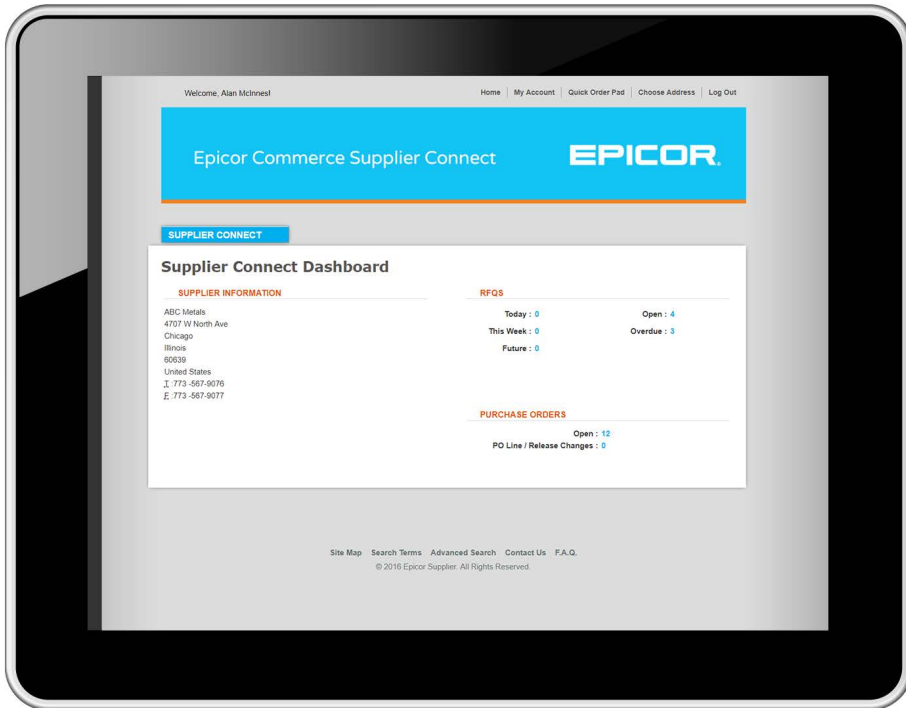
Strengthen your competitiveness by offering customers and business partners the ability to interact with your brand online. Supplier Connect is a supply-chain-focused feature of Epicor Commerce Connect—a complete, connected, and customer-proven business solution for modern digital commerce and omnichannel 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—Epicor 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

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

(See figure 6.2)



**Figure 6.1** *Supplier Connect—improves communication with suppliers to accelerate time to market, ensure accuracy, and drive out costs in your supply chain.*

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.

(See figure 6.1)

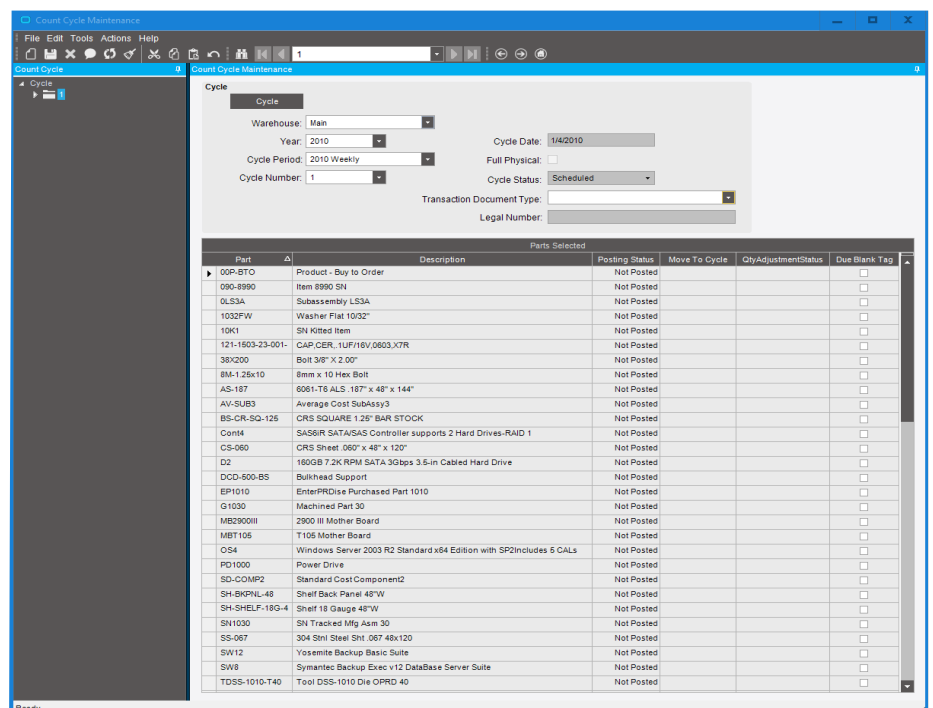
## Supplier Relationship Management

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.

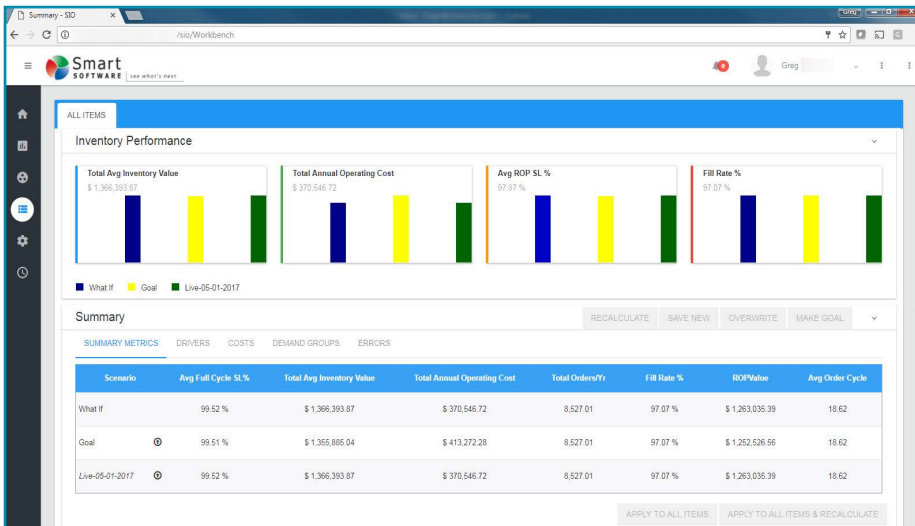
Supplier RFQ responses automatically build or add to existing part price-break tables with current effectivity dates to be used in other Epicor applications.

## 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



**Figure 6.2** *Inventory Management—Control inventory and significantly reduce annual audit costs.*



**Figure 6.3** Epicor Smart Inventory Optimization —Easily visualize your inventory performance reports and share with key stakeholders

## Lot Tracking and Attributes

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

Epicor SCM 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.

## Epicor Smart Inventory Optimization

Epicor Smart Inventory Optimization delivers cloud-based inventory policy decision support and the means to share, collaborate, and track the impact of your inventory planning policy. Reconcile holding costs, ordering costs, and stock-out costs in order to prescribe the inventory policy and service levels that can help you yield the total lowest cost. To determine the right plan for your organization, assign service-level constraints and targets, evaluate proposed policies, and perform "what if" scenarios. Share proposed policies and agree on a plan that best meets the company's objectives. Epicor Smart Inventory Optimization will automatically upload the optimal planning parameters back to Epicor ERP, and works with a variety of replenishment policies including reorder point/order quantity, min./max., safety stock planning, and order up to levels.

(See figure 6.3)

## Epicor Smart Operational Analytics

Epicor Smart Operational Analytics is a cloud-based reporting platform that provides a fast, easily understood, current perspective on the state of your inventory. It performs against critical metrics, actual supplier lead times, and opportunities to rebalance stocks across facilities to help uncover operational inefficiencies. Inventory analytics offers a 360-degree view of your inventory to identify value, stocking trends, overstocks, understocks, potential order cancellations, and root causes of inventory issues. Supplier analysis provides comprehensive insight on your suppliers by measuring historical performance and lead times, which allows you to rank suppliers and identify trends. Operational performance analysis helps you continuously improve your operation by measuring and reporting on key performance indicators (KPIs) such as service level and fill rate performance, time to ship, number of stock-out events, and more.

## 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

### 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, and eventually the shipment of that item to the customer. Also supporting the inbound generation of PCIDs, Epicor ERP allows you to reserve and allocate PCIDs for sales orders, issue material to jobs, produce PCIDs from jobs, and receive PCID finished goods in inventory to complete processing transactions. Perform pick 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

### Manifesting and Freight Management

Today's customers have many different shipping options. Epicor Manifest, a multicarrier shipping software for Epicor ERP 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, Epicor Manifest communicates with various carriers and provides the information about that shipment back to Epicor ERP. As part of the shipping function, Epicor Manifest prints labels, bill of ladings, and export documents to be included with your shipment. Capabilities include: International shipments and documentation

- ▶ Multiaccount support
- ▶ Electronic Export Information (EEI) submittal and retrieval processing
- ▶ Configurable handling fees

- ▶ Automated hazmat paperwork
- ▶ Rate shopping
- ▶ Routing guide and best way
- ▶ Automated blind shipping
- ▶ Print or email return labels
- ▶ Order consolidations

### Warehouse Management

The Epicor Warehouse Management System (WMS) leverages Epicor ERP, 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

(See figure 6.4)

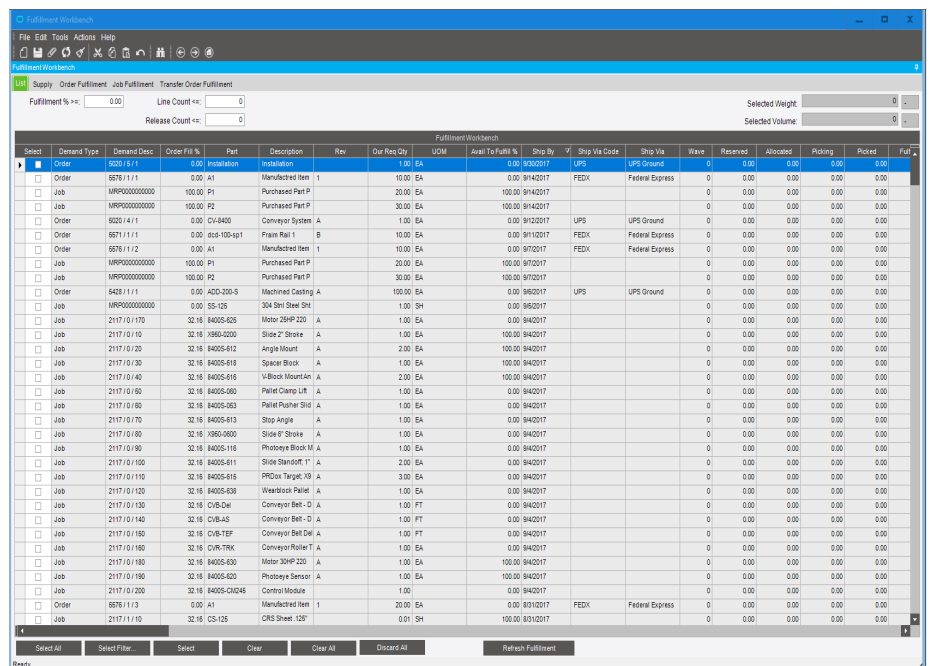


Figure 6.4 Warehouse Management—The Fulfillment Workbench offers a template-based approach to automate and streamline the fulfillment process for various techniques.

Handheld

Whether doing physical inventory or material moves, or looking up serialized part information, the Epicor Handheld application offers an easy-to-use interface that is designed for plant and distribution employees. The Epicor Handheld module allows you to track your inventory as it moves throughout your enterprise with real-time data capture to improve inventory accuracy and speed up the order-to-ship cycle. Providing your users with event-based directing and routing of all managed tasks in real time, the Handheld module not only

helps you maintain complete transaction event history for analysis and reporting purposes, but when coupled with Advanced Material Management, it also provides detailed tracking of material requirements and WIP information through mobile access to the material and pick orders queue. Complete functionality also includes:

- ▶ Auto-print-control support
  - ▶ Seagull Scientific, Inc. BarTender® labeling support
  - ▶ Auto putaway processing
- (See figure 6.5)



Figure 6.5 Handheld—See improved inventory accuracy with wireless device management of inventory functions, such as on-the-fly adjustments and viewing the material queue.

Contact us today  [fyanez@auros.com.mx](mailto:fyanez@auros.com.mx)  <http://www.auros.com.mx>

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