EPICOR

Epicor Prophet 21 Overview

Epicor is a thought leader and we'll continue to invest in their technology and take advantage of the tools they bring to the table."

John Wiborg, President
Stellar | Industrial Supply

CONTENT

Epicor Prophet 21

Maximizing performance across the supply chain

Epicor understands that as your customers demand more product options, heightened quality, and shortened lead times, it can be increasingly difficult to drive business performance that maximizes profit. Delivering on these expectations with flawless execution and minimal business interruption defines your success and the success of the intricately woven supply chain that supports it.

At Epicor, we understand this delicate balance and have developed an end-to-end solution with the right tools to efficiently procure, assemble, ship, and deliver the goods your customers want—when they want them. It's one thing to understand the supply chain management (SCM) needs of your organization, but executing at peak performance requires embedding the supply chain processes within an effective and efficient enterprise solution.

" To be considered best-in-class, you need partners that are best-in-class, and Epicor delivers."

Mark Shannon
Vice President and Owner | Tower Fasteners

Cloud Based Distribution ERP System

With more than a half-century of experience, Epicor helps distributors grow sales, improve margins, and increase productivity with enterprise resource planning (ERP) systems that keep them healthy and thriving in today's highly competitive marketplace. Epicor Prophet 21 is a leading ERP solution for wholesale distributors that combines proven distribution expertise with a web-enabled infrastructure and modern technology stack. Cloud and on-premises deployment options are available.
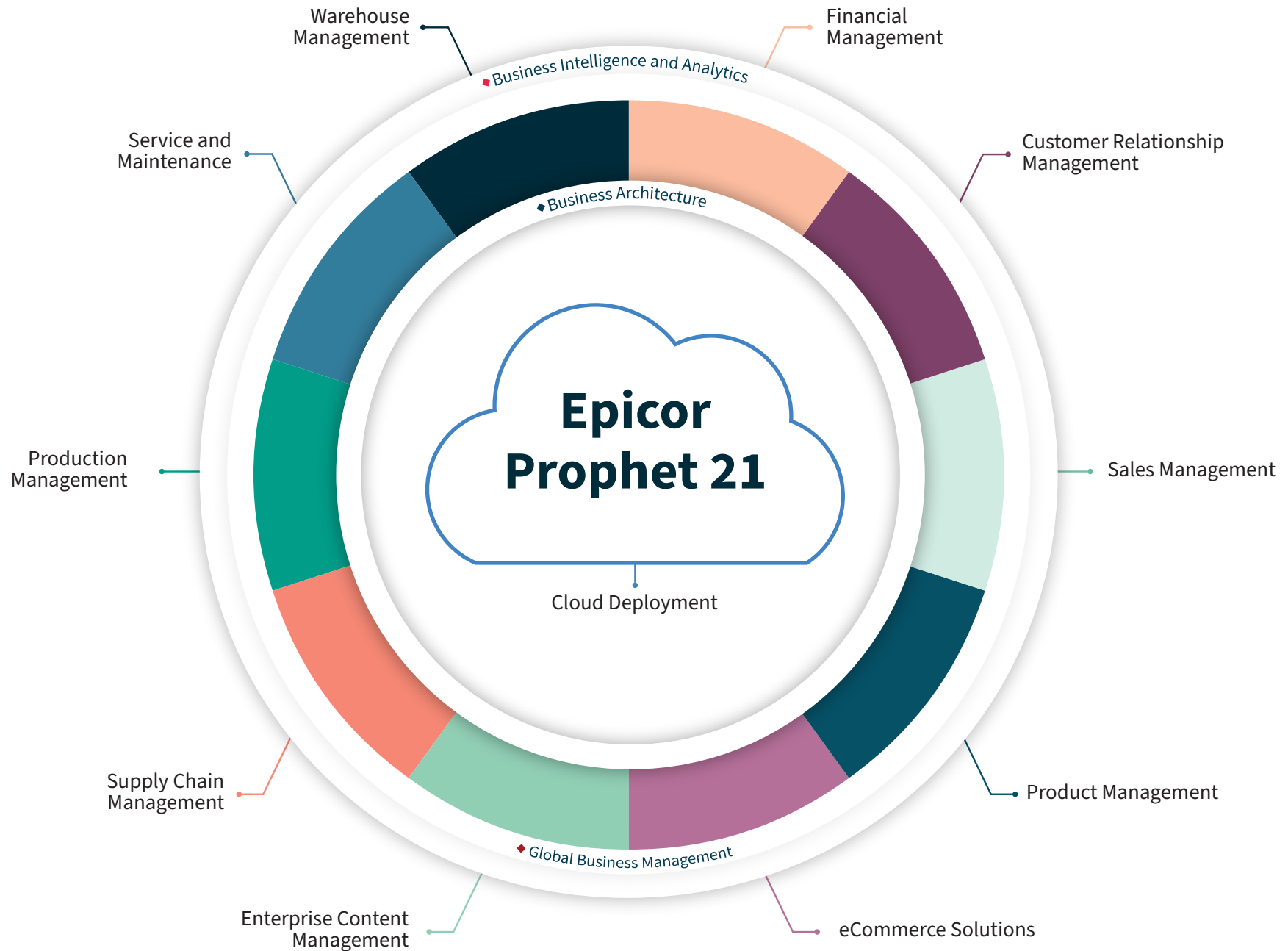
Prophet 21 enables your most critical business areas to work more efficiently, including:

- Customer Relationship Management—CRM tools allow you to access information quickly and efficiently so you can streamline your day-to-day processes while improving customer service

- Order Management—whether orders are entered, remotely via a mobile device or laptop, or online by the customer, information goes directly into your Prophet 21 for fast order processing

- eCommerce—when you deploy Epicor Commerce—a cloud-based eCommerce solution—you can increase sales, reach new customers, and shorten sales cycles for your products and services

- Inventory Management—multiple dynamic inventory replenishment methods give you the flexibility to lower carrying costs, minimize excess or obsolete inventory, improve cash flow, and increase customer service levels

- Purchasing—whether you have one warehouse or dozens, Prophet 21 distribution software centralizes the purchasing process so you can optimize buying power and inventory levels

- Warehouse Management System—WMS brings a new level of accuracy to all warehouse processes, including receiving, cross-docking, put-away, adjustments, picking, cycle counting, and inventory operations

- Financials—the Prophet 21 real-time general ledger provides up-to-the-minute financial statements, which allow you to get a detailed picture of your company's financial situation, and make knowledgeable business decisions—allowing you to be proactive instead of reactive

- Manufacturing—Prophet 21 Manufacturing allows you to track assemblies and production orders from start to finish

- Service and Maintenance—integrated Service and Maintenance helps you keep track of service orders, service contracts, preventative maintenance schedules, warranties, and more, while monitoring service technicians' schedules and open service orders

- Grow Business Intelligence—Grow leads the way in speed and agility with an unparalleled no-code self-service BI Solution. It includes a cloud data warehouse, no-code data transformations, dashboard visualizations, open APIs, and 100+ connectors across popular industry apps. Grow provides pre-built dashboards and analytical power that seamlessly syncs with Prophet 21. Quickly identify trends, enhance customer engagement, and increase sales conversion rates to better manage your business.

- Epicor Automation Studio—Epicor Automation Studio, powered by Workato, is the first cloud-based enterprise automation platform embedded within Prophet 21 that can automate the connections to applications internally and externally. Using little to no coding, employees can easily integrate and automate scheduled and event-triggered workflows and robotic process automations (RPAs) between apps, data, and Prophet 21. Automation Studio is designed to help streamline workflows, bridge the IT gap, and connect to popular applications such as Salesforce, ADP, and ServiceNow.

AI@ Epicor

Epicor's advantage with AI has been years in the making. The combination of an industry-focused ERP and AI is unique and will deliver a competitive advantage for customers. Many of our products have AI-infused capabilities across our product portfolio including AP Automation within Epicor Content Management, financial forecasting in FP&A, advanced inventory optimization with Epicor IP&O, and Automation Studio, to name a few. We will continue to invest in AI to solve real, measurable business problems that reduce friction, automate connections, and deliver an insight advantage, all while keeping employees at the forefront of this technology.

Warehouse Management

Financial Management

Service and Maintenance

Business Intelligence and Analytics

Business Architecture

Customer Relationship Management

Epicor Prophet 21

Production Management

Sales Management

Cloud Deployment

Supply Chain Management

Global Business Management

Product Management

Enterprise Content Management

eCommerce Solutions

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Enterprise Content Management

- Content Protection
- Document Retention
- Intelligent Data Capture
- Workflow
- Full Integration
- Flexible Deployment

Service and Maintenance

- Call Center
- Service Order Management
- Service Contracts
- Scheduling and Dispatch
- Preventative Maintenance
- Warranty Tracking
- Epicor Field Service Management

Warehouse Management

- Receiving and Put-Away
- Pick, Pack, Ship
- Group and Zone Picking
- Inventory Movement
- Physical/Count Cycle Counting
- Wireless Workbench
- Elite EXTRA Last Mile Delivery

Supply Chain Management

- Purchasing Management
- Advanced Demand Forecasting
- Automated Replenishment
- Inventory Optimization
- Warehouse Management
- Customer and Vendor Managed Inventory
- Shipping and Logistics
- Epicor Quick Ship
- Epicor Commerce
- Epicor Supplier Portal
- B2B Integration
- Epicor EDI
- Epicor Field Service Management
- Elite EXTRA Last Mile Delivery

Production Management

- Production Order Management
- Labor Tracking
- Routing
- Kits, Assemblies, and Multilevel BOM
- Third-Party Processes
- Progress Billing
- Epicor EDI

Financial Management

- General Ledger
- Accounts Payable
- Accounts Receivable
- Financial Reporting
- Tax Management
- Credit and Collections
- Credit Card Payments
- Financial Planning and Analysis

Customer Relationship Management

- Contact Management
- Opportunity Management
- Sales Master Inquiry
- Customer Buying Trend Analysis
- Rewards Programs
- Campaign Management

Sales Management

- Quote and Order Management
- Integrated eCommerce
- Counter Sales
- Integrated Credit Card Processing
- Strategic Pricing
- Epicor Commerce
- Dealer Network Portal Sales Order Automation
- EDI / Demand Management
- Complex Product Configuration
- Dynamic Pricing
- Epicor FP&A

eCommerce Solutions

- B2B and B2C Channel Support
- Full Integration
- Compelling Storefronts
- Mobile Access
- Real-Time Stock Levels
- Search Engine Optimization
- Epicor Commerce
- Epicor EDI
- 2D/3D/AR Visual Product Configuration

Product Management

- Product Data Management
- Import/Export Data
- Taxonomy
- Revision Control
- Manage Accessories and Substitutes
- Product Costing
- CAD & Design Automation

◆ Business Architecture

- Automation Studio
- Cloud Deployment
- HTML5
- Angular JS
- SQL Server®
- RESTful API
- Microsoft® .NET
- Extensibility Toolset

◆ Business Intelligence and Analytics

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

◆ Global Business Management

- Multicompany Management
- Multicurrency Management
- Multilingual Data Management
- Master Data Management
- Country-Specific Solutions
- Epicor Security Suite

Designed for Your Industry

Epicor provides industry-leading solutions for distributors of all sizes. A feature-rich application, Prophet 21 has been developed to manage the requirements of distribution industries including:

- Consumer packaged goods
- Electrical
- Fasteners
- Fluid power
- HVAC
- Industrial
- Jan/San, Cleaning, and Hygiene goods
- Medical supply/pharmaceuticals
- Paper and packaging
- Pipe/valve/fittings
- Petroleum
- Plumbing
- Safety supply
- Tile and flooring
- Welding supply/packaged gases

In addition, Epicor is either a member of or preferred provider to more than 40 industry associations and marketing or buying groups, such as A-D, CDI, CTDA, DPA, Eaton, FPDA, HIDA, IDC-USA, STAFDA, TUG, NAW, NAED, ISA, and IDEA.

"The fact that the people at Epicor live and breathe distribution shows in the products."

Kevin Reidl
Executive Vice President
Hodell-Natco Industries, Inc.

Technology

Prophet 21 Technology

Prophet 21 is an industry-specific solution that is easy to use and highly flexible. It combines proven distribution expertise with an end-to-end, web-enabled infrastructure and modern technology stack—including HTML5, Angular JS, .NET, and SQL Server®—offering improved agility, scalability, adaptability, and reliability. Cloud and on premises deployment options are available—letting you choose the deployment that is right for your business while letting you scale, evolve, and grow as your business changes.

Prophet 21 on Microsoft® Azure®

Epicor Prophet 21 delivers a modern, cloud-based experience that removes dependencies on fat clients and terminal services to deliver a lower TCO for distributors. It is a device-independent system ready to run on browsers, tablets, and smartphones in iOS®, Android™, and Windows® environments. The Epicor approach to cloud-based applications provides easier access to information not matter where your employees are—in the warehouse, in the field, or working counter sales.

Powered by Microsoft Azure, Epicor Prophet 21 in the cloud brings you missioncritical, industry-specific value to drive business growth—faster, easier, and more reliable than ever. In our increasingly digital world, your ability to survive, compete, and grow depends on how your business leverages the latest best-practice technology. Manual, disconnected processes simply cannot keep pace. Prophet 21 offers true cloud deployment—providing businesses

with distribution-specific software on a simple monthly subscription basis.

Microsoft SQL Server

Prophet 21 was optimized specifically for the Microsoft SQL Server because the efficiencies gained by Microsoft SQL can dramatically increase business performance. It provides scalability, reliability, and real-time access to data from any off-the-shelf data analysis programs. Additionally, Prophet 21 has been designed to allow distributors to leverage the work of the Epicor development team.

An innovative feature allows admin staff to copy and paste SQL Statements used within Prophet 21. This can provide a valuable shortcut to writing your own reports, portals, or queries—saving you time and effort and reducing the importance of being a SQL expert.

Extensibility through the entire technology stack

Business today is fast-paced, highly competitive, and more demanding than ever before. In order to remain competitive, distributors need tools to personalize and extend their ERP systems to their exact business processes. Prophet 21 offers a powerful, robust Software Development Kit (SDK). Prophet 21 SDK offers extensibility through the entire technology stack. The SDK allows distributors to add their secret sauce to help differentiate themselves from other distributors. Additionally, the design of the Prophet 21 SDK allows customers to personalize or extend Prophet 21 without affecting the application source code. Distributors can use the SDK for form changes, screen changes, user-specific home pages, business rules, and to integrate outside application via the

API—all while staying on the development roadmap and upgrade path.

Prophet 21 Browser Application

The Prophet 21 Browser Application is a browser based version of Prophet 21 that translates the user experience to the web, so you can use its familiar and rich distribution features from a web browser. Now you can take Prophet 21 with you outside of your corporate network and work from anywhere without the need for a VPN connection. With minimal training, your employees can be mobile and work anywhere, anytime, increasing productivity. The Prophet 21 Browser Application is included with your Prophet 21 Maintenance Program. The Prophet 21 Browser Application can be deployed as either an onpremises or cloud-based solution.

Personalize the user experience

The Prophet 21 DynaChange® extensibility suite provides the flexibility you need to tailor the application's appearance and logic to your company's needs. DynaChange allows you to customize screens/windows, move or hide fields from screens, create userdefined fields, edit or add new tabs of data, personalize menus, adjust popup searches, add metrics, and add metrics. Additionally, DynaChange Portals lets you design user specific home pages. These home pages provide the specific, real time views of your data that are most relevant to each employee. This tool allows you to add to the portal views currently available in your Prophet 21 by designing new views that assist your employees in their day-today activities. These portals—designed by you—can be assigned to users and inserted into Prophet 21 or displayed in a browser.

Business rules

DynaChange Rules allows companies to take external business rule logic and apply it within Prophet 21 in order to increase efficiencies and minimize costly errors. Best of all, DynaChange Rules does not alter the Prophet 21 application code, so the rules you establish automatically carry over each time you upgrade to a new version. A distributor could set up a workflow so that a purchase order placed over a specified dollar amount triggers an alert to a sales manager for signoff. Examples include:

- Conversion rules—e.g., automatic currency conversions

- Validation rules—e.g., creation of alerts or error messages if specified data requirements are not met

- Asynchronous workflows—inserting triggers in Prophet 21 to automatically initiate a specified workflow such as a P.O. approval process

Connecting your business to the world

Today's fast-moving business environment requires tighter integration between you, your partners, and your customers than ever before. This need is especially critical for your business systems. To provide the responsiveness you need, your business systems must simultaneously talk to other applications, websites, and content on the Internet.

The Prophet 21 Application Programming Interface (API) provides a full .NET stack that supports SOAP and REST for Internet connectivity for more than 300 services. The Prophet 21 API is already a proven platform that is used to connect Prophet 21 to other Epicor companion applications like Epicor Proof of Delivery. Now, you can connect your business to the rest of the world with this powerful web services tool.

The Prophet 21 API gives you tools to easily integrate outside applications with Prophet 21. The extensive APIs toolset includes:

- v2 P21 API—a stateless REST API that works with most of our systems using a metadata model

- Entity API—a very specific set of stateless, fit-for-purpose REST endpoints using strongly typed business object models

- Interactive API—a revolutionary technology allowing developers to interact with a stateful Prophet 21 session

- Data Services API—allows secure reads from your Prophet 21 database using OData protocol
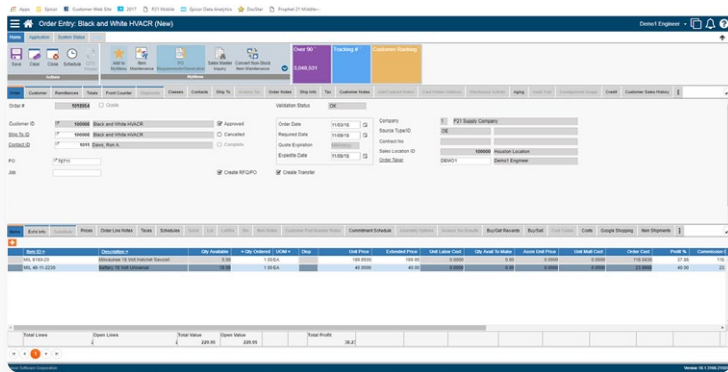
Customer Relationship Management

In order to succeed in today's fast-paced business world, providing customers with excellent personal service is a must. Today, many distributors are turning to customer relationship management (CRM) tools to help their business recognize and provide customers with the attention they deserve. Epicor Prophet 21 CRM tools allow you to quickly and efficiently manage prospects, customers, and contacts—from opportunity, to quote, to order—so you can streamline your day-to-day processes and improve customer service.

Four-part approach

Epicor takes a four-part approach to CRM. The first is sales force automation that provides your sales representatives with lead generation tools to manage their pipeline and up-sell to customers. You can track lead/sales progress by defining opportunities and reporting on your sales reps' pipelines.

The second part of CRM includes marketing capabilities. These tools allow you to fax and email within Prophet 21, produce lead generation call lists, and manage call center activity—enabling you to increase your customer base at a minimal cost.

The third part of the Prophet 21 CRM approach is contact management. This goes beyond maintaining customer addresses and phone numbers to actually tracking customers' buying habits so you can anticipate their needs.

Finally, CRM includes customer and territory management tools. These easy-to-use, intuitive tools allow sales representatives to identify customers whose sales are up or down. With a single click, they can drill down to a 360-degree view of the customer and have all the information they need to make contact.

Order Management

Order entry

Your order management processes directly affect your customers and how they view your business. Customers demand faster, better service and will go elsewhere if you can't meet their needs. Prophet 21 enables you to complete the entire order entry process from one screen:

- Enter quotes and orders
- Convert quotes to orders
- Expedite orders
- Check stock
- Search price and availability requests
- View past invoices
- Verify shipping preferences

Whether orders are entered at the counter, remotely via a mobile computing device or laptop, or over the web, information goes directly into Prophet 21 for faster processing—eliminating rekeying errors.

With the built-in ability of Prophet 21 to suggest accessory items and substitutions, even your most inexperienced salespeople will sound like seasoned pros. You can link product information—such as material safety data sheets (MSDS) or product specification sheets—to item codes and send that information directly from Prophet 21 to the customer to confirm they will get exactly what they want.

You can also provide value-added services with Prophet 21 kitting and light manufacturing capabilities.

Inventory Management

Your single biggest business investment—the inventory in your warehouse—is at the heart of your company. Too much of something and you don't have room for what your customers want. Run out of an item and it could cost you lucrative business. Prophet 21 enables you to balance your customer service needs while maximizing your return on investment—by increasing inventory turns and reducing your inventory investment.

Multiple and dynamic inventory replenishment methods provide you with the flexibility to lower carrying costs, minimize excess or obsolete inventory, help improve improve cash flow, and increase customer service levels.

In addition, Prophet 21 captures information on inventory changes, allowing for accurate data when making purchasing decisions. If you have multiple branches, you can even centralize your inventory with the Prophet 21 regional distribution center inventory management capabilities, enabling you to reduce overall inventory levels.

Warehouse Management

With all the activity that goes on in your warehouse, keeping inefficiencies out of your processes is a must if you want to maximize your profitability and minimize losses. Prophet 21 warehouse management tools provide flexible, real-time control and efficiency—from receiving through shipping. A powerful range of features manages warehouse activities—including receiving, cross-docking, put-away, picking, inventory adjustments, cycle counts, and much more. Business transactions affecting the warehouse are automatically generated and processed without rekeying information—saving time and reducing errors.

These processes are further streamlined by alerting warehouse employees of customer pick-up at front counter operations.
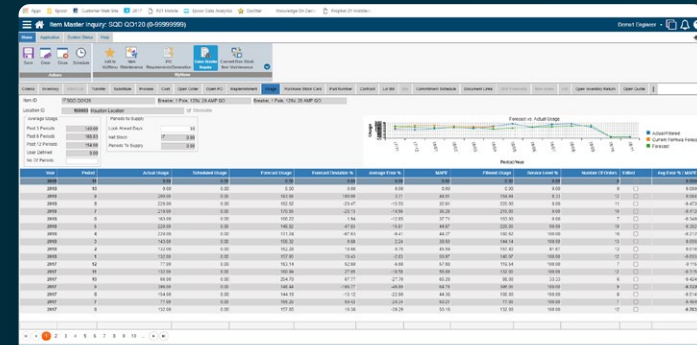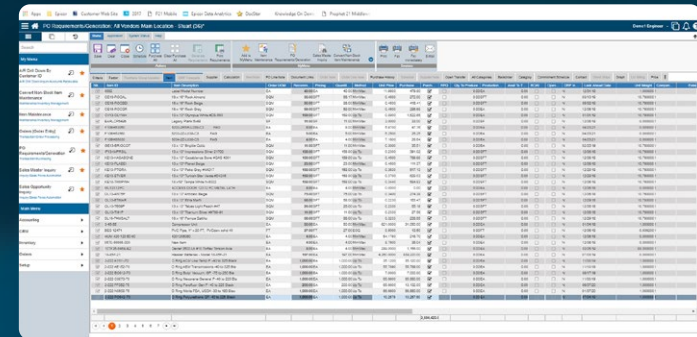
Purchase Management

Whether you have one warehouse or dozens, effective purchasing processes can vastly improve your customer service and sales. Prophet 21 centralizes the purchasing process, enabling you to optimize buying power and inventory levels. Buyers can quantify the return on promotions or forward buys, allowing you to increase customer service levels in relation to costs and focus your efforts on items that are earning you the highest profits.

A variety of purchasing scenarios—including vendor substitutions, discounted items, drop ships and specials— allow you to adjust your processes to meet your customers' ever-changing needs—all while controlling your costs. In addition, Prophet 21 supports overseas procurement and landed costs associated with buying goods from foreign manufacturers.

Epicor EDI Solutions

Our EDI Solution, provides a strong and modern B2B and EDI integration solution from one company. Automate your document integration with your supply chain partners and meet your customer's EDI compliance requirements with our EDI solutions. We have a program to help you to digitize your supplier network. Take advantage of our deep EDI industry expertise and proven track record. Our comprehensive suite of EDI solutions can help you drive operational efficiencies and strengthen the collaboration with your supply chain partners.

"We see Prophet 21 as a competitive advantage to help us provide the best level of customer service and drive costs out of the business and to improve the accuracy and quality of our services to meet our customers' expectations."

Jim Derry, *President | Field Fastener Supply Co.*

Financial Management

Most people don't think financial management can make their business money, but good financial management can actually drive dollars to your bottom line.

General ledger

Prophet 21 real-time general ledger provides up-to-the-minute financial statements, giving you a better handle on your company's financial situation as business is transacted—allowing you to be proactive instead of reactive.

Financial reports can be run daily with drill-down capabilities that allow you to access historical information for faster auditing. The real-time general ledger also eliminates laborious day-, month-, and year-end closing processes. Plus, multicurrency functionality makes it easier to do business wherever your business partners are located.

Accounts receivable

Cut your accounts receivable (AR) days with Prophet 21. Prophet 21 enables you to track your customers' outstanding invoices and set alerts when days or balances exceed levels you set. Notes and follow-up capabilities provide a history of conversations to aid when making calls. Flexible posting methods make it easy to track whether a check is for multiple invoices or for consolidating several accounts under one corporate umbrella.

Accounts payable

Prophet 21 streamlines your accounts payable (AP) processes by directly integrating your inventory receipts and purchase orders. Check processing and payment processes ensure that you don't lose discounts and that bills are paid on time. Furthermore, you can choose payment types by either vendors or invoices. Rebates are tied directly to order processing for accurate reports so you can maximize the amount of money you earn.

Dimensional Accounting

Dimensional accounting, or the ability to set up unique reports for specific areas, will arm distributors with the financial data they need to make informed and strategic decisions across their organization. These reports can easily and efficiently view and use the GL to do reporting without the need to expand the chart of accounts. Dimensional accounting allows you to track the following dimensions: Sales rep, Order classes/Order types, Project/job, Order taker, or create your own.

Prophet 21 comes packed with a host of important financial features that provide vital insight into your company's wellbeing. Receive up-to-the-minute financial statements, track outstanding customer invoices, and integrate your inventory receipts and purchase orders to streamline your AP processes.

- General Ledger (GL), Accounts Receivable (AR), and Accounts Payable (AP)
- Dimensional accounting
- Close individual journals within a period
- Real-time information
- Transaction drill down
- Write financial reports
- Export financial data to Excel
- Online cash collections
- Designate customers' invoice preferences
- Apply cash receipts to multiple invoices
- Convert foreign currency
- Automatic invoice reconciliation
- Process payments and rebates
- Automatically reinstate vendor invoices for payment when voiding checks
- Pull up inventory receipt by the external purchase order number
- Set default purchase accounts
- Bank/cash account reconciliation
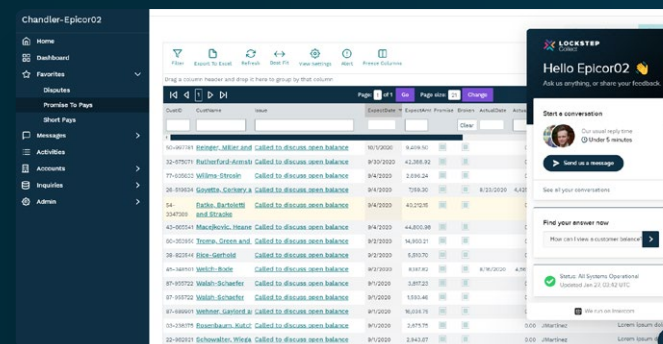- ACH check processing for US banks

Credit and Collections

Accounts Receivable is one of the largest assets of any company, and it's typically one of its most fluid.

Most businesses, however, have to write off four percent of this asset every year. This is a substantial cost to the business that can be greatly reduced with better management.

Take control of your outstanding receivables and reduce days outstanding (DSO) through automated AR management with Epicor Cash Collect..

Complete functionality includes:

- Workflow-based collection management
- Centralized activities
- Collection templates
- Automated calls, texts, emails
- Customer self-service portal
- Team management and reporting
- Projected cash receipts
- Multi-currency and multi-company

Reporting and Analysis

Prophet 21 includes robust reporting tools to help improve decision making. Epicor Report Studio is an integrated and intuitive reporting tool built into Prophet 21 to help your organization make the most of your ERP data. Anyone in your organization can run reports without the need for special coding or database skills. The reports are easily exported to Excel for you to use the data as you need it. With built in role or individual based security, and the ability to schedule or email reports, your entire organization can drive efficiency and increase your overall profitability.

- Access hundreds of standard reports
- Import/Export data
- Real-time reporting
- Ad hoc reporting
- Print preview
- Schedule tasks

Epicor Cash Collect is a fully cloud-based product offering efficient automation for your credit collection processes. The Next Best Action pane saves precious hours for credit managers. Transcribe calls to searchable texts, make automated calls. Chat with product support agents directly from within the product.

Financial Reporting, Budget Planning, and Forecasting

Epicor Financial Planning and Analysis, or Epicor FP&A for short, is a robust FP&A solution which covers financial reporting & analysis, budgeting, planning, forecasting, and consolidation in a single, easy-to-use tool.

There are four different packages within Epicor FP&A to choose from that cater to small, medium, and large companies. It features both an Excel add-in and a web-based user interface. It is modular and starts with financials but comes with add-on modules that can be added to its base package to extend the scope of data included beyond just financials.

Despite being in the cloud, Epicor FP&A can connect to ERP systems deployed on-premises or in the cloud.

The focus of Epicor FP&A is delivering best practices to finance users of the make, move, sell markets, and offering quick time to value. Epicor FP&A, as a solution, understands that the journey to the target operating model of co-piloting the business requires that finance has at least a granular understanding of their performance. As a reporting and budgeting tool, Epicor FP&A gives you that data granularity. You get powerful drill capabilities that lets you dig into journal transactions, and further down to invoice transactions.
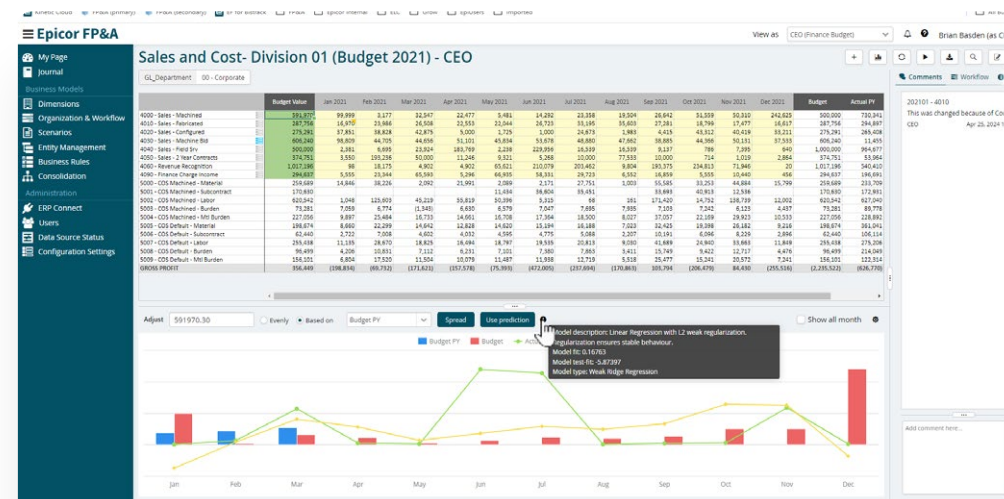
It is a tool that has a built-in understanding of your ERP structures, making it easier to get started with your reporting, budgeting, planning, and forecasting transformation. At the same time, it offers you the flexibility to configure your Charts of Accounts set up

in a way that reflects the way you report and budget. All implementations of Epicor FP&A utilize the crawl-walk-run approach. The implementation typically begins with financial data to get the users up and running quickly.

You can then extend your scope of data to Sales, AR, AP, HR, and other operational data as you get comfortable and as your need arises.

Here are samples of its rich capabilities. This is not an exhaustive list.

- Baseline prompt when creating reports
- Powerful processing power for generating, modifying, and updating reports
- Includes out-of-the-box reports and budget sheets
- Powerful drill functionalities

- Superior formatting capabilities
- Use of dimensions in reports
- Excel and Web reports
- Pragmatic budgeting workflow
- Budgets and forecasts powered by Machine Learning
- Rolling forecast support
- Spreading rules
- Version control
- Unlimited what-if analysis
- Built-in business rules engine
- Multi-company, multi-currency support
- Allocations
- Eliminations
- Single and unified platform for end-to-end processes

Epicor FP&A uses ML with just a click of a button, allowing you to review the model selected and revise the default budget values given by ML

Tax Automation

Collecting and remitting sales and use tax is a government-required, compulsory activity. It doesn't drive revenue, and it doesn't reduce expenses, so any time or money spent on tax compliance is—by nature—nonprofitable. There are more than 16,000 United States and Canadian tax jurisdictions alone, and the rates, rules, and boundaries change relentlessly. Keeping up with all of the tax changes is an operational distraction and a drag on the efficiency of your organization. Epicor Tax Connect gives you the option of determining sales taxes automatically based on the origin and destination of the sales transaction. It integrates to a constantly updated, comprehensive, online database of tax rules where each tax transaction can also be stored for historical and reporting purposes.

Epicor Tax Connect Global helps to determine sales tax in international business relations. Transactions in all directions between the United States and the European Union member states can take the advantage of tax determination, thus making business easier and making tax compliance less stressful.

Distributors are often exempt from sales taxes as they sell to certain types of entities, such as governmental bodies, non-profit organizations, or retailers. In specific cases, distributors need to prove the exemption by storing tax-exempt certificates for each sales transaction. Prophet 21 allows you to upload, store, and retrieve tax-exempt certificates from the Avalara Exemption Certificate Management service directly within your system when entering a customer or sales order.

"Epicor engages with the customer, and works with you one-on-one at all levels of the company. They are always willing to talk things through, and that collaboration has made a huge impact on our success."

Melissa Selig, Chief Financial Officer
Grove Medical

Performance Management

You can't make good decisions using bad data. Prophet 21 includes robust tools to direct activities and improve decision making.

Workflow provides the flexibility your organization needs to map your business rules to your operational processes. You can monitor critical business events and immediately inform specified recipients, groups of recipients throughout your organization, or recipients within your customer or supplier base.

You can set parameters so Prophet 21 can send email alerts to employees, customers, or vendors when critical order, shipping, purchasing, and accounting events occur—speeding communications and reducing costs associated with phone calls, faxes, and manual reports. Simply put, Workflow is an around-the-clock monitoring system that constantly oversees and compares the incoming and outgoing flow of data, enabling you to respond to changing events quickly and efficiently.

Prophet 21 also includes robust reporting tools to assist in improving decision-making by summarizing key data, identifying trends, and enabling forecasts.

You set the parameters of each report within Prophet 21, including grouping, views, and detail. With Prophet 21 as/of reporting, there is no reason to print and file the reports you run, and you can view past reports at any time according to whatever date parameters you choose. You can also export the data to any off-the-shelf data access tool—such as Excel® or Access®—to streamline data sharing.

Mobile Access

Prophet 21 includes mobile computing functionality that enables remote employees to download key data from the solution and upload new information such as orders, quotes, and signatures from deliveries.

Remote order entry integration reduces the time your salespeople spend on paperwork, lessens the risk of rekeying errors, guarantees accurate pricing, and eliminates handwritten copies of orders.

Electronic signature capture enables your drivers to download shipping lists to a handheld device, collect signatures from customers as deliveries are made, and upload them to the appropriate electronic file back at the office.

Epicor Commerce

Epicor Commerce has four offerings that offer choice and flexibility in selecting an eCommerce solution to match a manufacturer's digital online strategy.
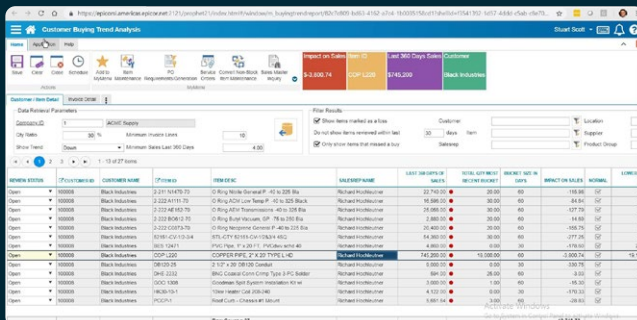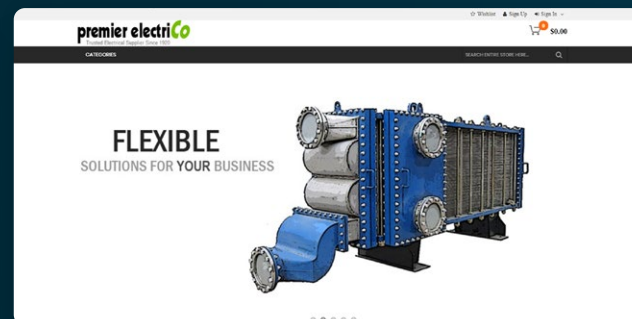
Epicor Commerce Express

is a quick to implement and affordable B2B online customer portal with all the essential elements that allow businesses to immediately improve productivity, provide quality online experiences, and stay connected with their customers and suppliers.

Epicor Commerce Base

is a complete package of B2B and B2C eCommerce functionality with a standardized set of site themes, features, and implementation hours for faster time to market and a favorable return on eCommerce investment.

Epicor Commerce Signature

is a theme based, low code, no code option with B2B and B2C capabilites. With Epicor Signature, you have advanced design options and marketing features to create a beautiful and effective site, plus a full shopping experience with automated upgrades.

Epicor Commerce Advanced

Epicor Commerce Advanced is a highly customizable offering with a full feature set that allows your business to express your brand online and maximize your omni-channel ecommerce presence.

Businesses need some aspects of consumer B2C websites—with their ease of use and repeat purchasing— combined with B2B business capabilities to develop contacts into accounts that align with their procurement processes.

With Epicor Commerce, your customers will see a modern eCommerce website focused on convenience, ease of use, and repeat ordering. You will get the templates and tools to deliver that rich customer experience throughout the life cycle— from casual browser to satisfied repeat customer.

Epicor Commerce provides even more value with cost-effective, cloud-based hosting and rapid implementation. The result is a comprehensively integrated, end-to-end solution supported by a variety of add-ons and technology partners.

Warehouse Management Solution

Further streamline your warehouse processes with the Epicor Warehouse Management Solution (WMS).

Developed exclusively for Prophet 21, this paperless warehouse solution brings a new level of accuracy to all warehouse processes, including receiving, cross-docking, put-away, adjustments, picking, cycle counting, and inventory operations. You can enhance customer service by ensuring you get the right products out on time, every time, while improving operating efficiencies through directed warehouse activities. For example, with the Warehouse Management Solution, you can save time by picking a single order, multiple orders for different customers, and transfer orders in a single pass through the warehouse.

Because the Warehouse Management Solution is fully integrated with Prophet 21, you can implement one technology solution for all of your corporate needs. The graphical user interface provides a shorter learning curve than most character-based RF offerings. It is compatible with both iOS® and Android® devices, allowing freedom of choice of devices—anywhere from a phone-size device to a ruggedized, fit-for-purpose barcode scanning device.

Business Intelligence

In today's fast-paced environment, where information is expected to be immediate and up to the moment, external business intelligence systems simply can't cut it. This is why Prophet 21 has an extensive range of business intelligence applications built in to support both immediate tactical and long-term strategic decision-making.

The system provides real-time data that can be presented based on the user's specific needs whenever and wherever the information is requested.
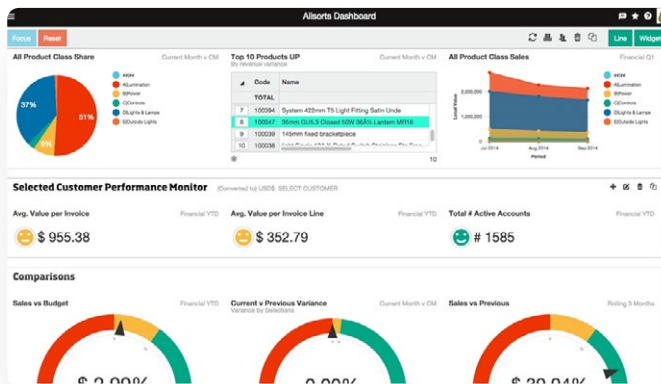

"We have been very pleased with our Epicor Prophet 21 implementation. We went live on time and under budget."

Scott Holland,
*Executive Vice President
Philip Rossenau Co., Inc.*

Reaching for New Levels of Business Understanding

As competition increases and margins narrow, businesses need sharper tools and deeper understanding to support the business. The tools must be fast, flexible, and cost-effective. Business analytics can help you meet these objectives. Epicor Data Analytics (EDA) enables unprecedented business insight to help companies grow by reducing cost, identifying new opportunities, supporting specific programs, and speeding decision-making. An easy-to-learn, easy-to-use service, Epicor Data Analytics can quickly start contributing to your business. You will not need another expert to maintain reports or make updates to spreadsheets with their hidden and seldom understood calculations. Epicor Data Analytics stays up-to-date with your business, as it changes daily.

Epicor Data Analytics shown on a mobile tablet

Epicor Data Analytics provides interactive dashboards and analysis of the data inside your business system. The dashboards provide visual displays, so you quickly see important information about how your business is performing. Unlike a spreadsheet, you can now "drill down" into the data by clicking on it to see the details that you need for the task at hand. Epicor Data Analytics is delivered by Epicor as a complete end-to-end service, fully integrated with Prophet 21, using your data to help you understand your business better. Each of the six content packages provides a starter dashboard and a deep integration into a specific set of Prophet 21 data—sales, purchasing, inventory, general ledger, accounts payable, and accounts receivable.

With Epicor Data Analytics, you are never disconnected from your information with the responsive mobile access. "Always connected" means your team and you are more productive and can respond quickly to the needs of your business.

Service and Maintenance

For those items that require attention after they've left the warehouse, Epicor offers Service and Maintenance for Prophet 21. Service and Maintenance helps you keep track of service contracts, preventative maintenance schedules, warranties, and more while monitoring service technicians' schedules and open service orders.

Fully integrated with Prophet 21, we have several options to meet your service needs. Our functionality automates and streamlines everything from tracking serial numbers to processing warranty claims—helping you simplify every step and serve your customers' needs from point of sale, to time of service, and beyond.

Shipping

Shipping is your lifeline to your customers—without it, orders back up, customer service suffers, and sales dwindle. Epicor offers several options to best meet your unique needs. From a comprehensive, multiple-carrier shipping solution to integration with a single carrier—such as UPS® or Federal Express®—Prophet 21 can streamline your shipping processes.

This powerful functionality seamlessly coordinates order entry and shipping, streamlining a distributor's shipping procedures by eliminating the need to navigate between modules to enter order and shipping information. In addition, it minimizes freight charges and increases shipping accuracy and throughput.

The integration with Prophet 21 helps you improve customer service by providing value-added benefits—such as tracking numbers and preprinted labels—and reducing the time it takes to process an order so customers receive material more quickly.

Elite EXTRA Last Mile Logistics

Elite EXTRA streamlines your delivery and returns process— seamlessly integrating Routing & Dispatch, Delivery Network, and Returns Automation solutions into your last-mile operations. Boost operational efficiency, reduce logistics costs, and elevate the customer experience with one, end-to-end logistics suite.

Epicor Inventory Planning and Optimization (IP&O)

What will happen next? Plan for success using demand planning and inventory optimization tools in Epicor IP&O.

Demand Planning

Epicor IP&O provides cloud-based statistical help with forecasting that automatically selects the right forecast model for each item— accounting for trend, seasonality, and promotion- or event-driven demand. Once the baseline forecast is produced, it is available for collaborative review and consensus planning by authorized stakeholders.

Forecast accuracy can be measured to help ensure the best possible forecast is delivered to the business at both the aggregate and item mix levels.
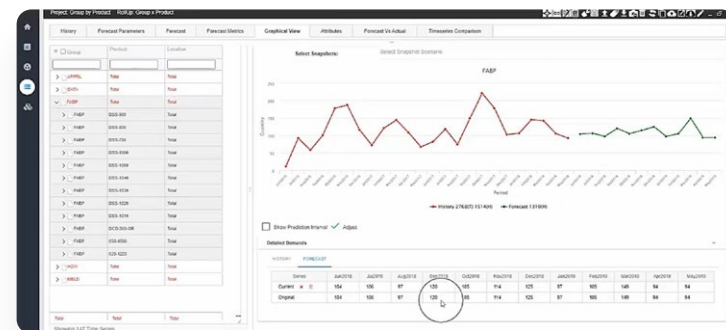
Inventory Optimization

Safety stock levels, reorder points, lead times, and order quantity directly influence the service vs. cost relationship. Epicor IP&O helps you maintain the balance between service and cost by providing inventory policy decision support and the means to share, collaborate, and track the impact of your inventory planning policy. Epicor IP&O reconciles holding costs, ordering costs, and stock-out costs in order to prescribe the inventory policy and service levels that yield the total lowest cost.

Users can optionally assign service-level constraints and targets and propose multiple policies for consideration. Then, they can share proposed policies and agree on a consensus plan that best meets the company's objectives.

Operational Analytics

Epicor IP&O offers a cloud-based reporting solution with a fast, easily understood, and up-to-date perspective on the state of your inventory and its performance against critical metrics, actual supplier lead times, and opportunities to rebalance stocks across facilities—helping to uncover root causes of operational inefficiencies. Get a 360-degree view of your inventory to identify value, stocking trends, overstocks, understocks, and potential order cancellations. Also, identify root causes of stock outs, excess inventory, and late deliveries.

Epicor Inventory Planning & Optimization (IP&O) allows users to adjust the forecast inventory levels easily in a grid

Epicor® ECM (DocStar®)

Paper-intensive business processes such as those in Accounts Payable—where multiple copies of documents need to be filed, retrieved, reviewed, cross-referenced and distributed for approval—can be done electronically with Epicor ECM (DocStar) for Prophet 21. This significantly reduces the consumption of paper and increases workflow efficiency. Epicor ECM (DocStar) electronically captures documents; streamlines business processes using workflow; automates the distribution of all documents, reports, and forms; and provides instant retrieval from the desktop. Moving from paper to paperless is possible with Epicor ECM (DocStar) software because the different steps and the attendant paper involved in a typical PO-based AP process can be managed electronically.

- The AP workflow process can be made more cost-efficient and time-efficient, as internally generated documents are captured directly into Epicor ECM (DocStar)
- Externally generated documents are brought into Epicor ECM (DocStar) software through scan, fax, or other capture methods
- Because the documents are electronically processed, anyone with security rights may access them from anywhere

Integrated Credit Card Processing

The Epicor integrated credit card processing solution enables you to accept customer payments with credit cards directly into Prophet 21 and receive immediate authorization—saving your accounts receivable (AR) employees time and energy tracking down customers with bad credit information.

In addition to speeding the AR process, the Prophet 21 integrated credit card processing solution can save you money by eliminating rental and maintenance fees associated with standalone solutions. You can also reduce expensive credit card fees by qualifying for bank card programs that reduce transaction rates.

Integrated Email and Fax

Send faxes at the touch of a button without getting up and walking to a dedicated fax machine. With the Epicor integrated fax solution for Prophet 21, you can send documents directly from Prophet 21 either by fax or email.

Integrated Forms

Have you ever thought about what your customers see when you send them important business documents such as quotes, order acknowledgements, packing lists, and invoices? These documents are touchpoints to your customers and influence how they view your company. They should portray a high-quality, professional image. With the Epicor integrated forms solution, you can generate professional, laser-printed documents "on the fly" and eliminate expensive, preprinted forms.

Technology That Enables Transformation

Today, you need a solution you can implement quickly without substantial cost to your business. Epicor Prophet 21 is designed to help your distribution business scale, change, and grow without major system modifications.

Prophet 21 combines proven distribution expertise with an end-to-end, web-enabled infrastructure and modern technology stack—including HTML5, Angular JS, .NET, and SQL Server. Cloud and on-premises deployment options are available.

Learn more about how Epicor Prophet 21 can help you grow your distribution business by contacting Epicor today.

Feature List

Technology

Prophet 21 combines proven distribution expertise with web-enabled infrastructure and a modern technology stack—including HTML5, Angular JS, .NET, and SQL Server®. Cloud and on-premises deployment options are available.

- Browser-based Application
- Multi-company
- Integrates with Microsoft Word, Excel, and Outlook
- Portal Views
- Integrated forms
- Forms Designer—requires Crystal Reports® license
- Set workflow events and alerts
- Online help
- Document linking
- DynaChange® Screen Designer
- DynaChange Tab Designer
- DynaChange Menu Designer
- DynaChange Navigator
- DynaChange Portals
- Security controls
- Notes capabilities
- Time stamp business transactions
- Audit trails

Customer Relationship Management (CRM)

Prophet 21 CRM helps you manage prospects, customers, and contacts—from opportunity, to quote, to order.

- Track prospect and client information
- Contacts integrated with fax and email
- Track opportunities
- Access key information from one screen
- Customer Master Inquiry
- Sales Master Inquiry
- Create and follow up on tasks
- Multiple ways to look up customers

Order Entry

Whether orders are entered at the counter, remotely via a mobile computing device or laptop, or over the web, information goes directly into your Prophet 21 for faster processing—eliminating manual work and re-keying errors.

- Enter quotes and orders
- One screen quote/order entry
- Price and availability requests
- Quote conversion
- Release schedules/blanket orders
- Multiple location processing
- Front counter sales
- Non-stock item creation
- Unlimited item information
- Accessory items
- Substitute items
- Front counter sales
- Signature Capture (requires hardware)
- Non-stock item creation
- Unlimited item information
- Kitting and production orders
- Secondary processing
- View customer past orders and quotes
- Multiple ways to classify orders
- Serial and lot tracking
- Return Material Authorization

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Pricing

Prophet 21 gives you the flexibility to set prices as you see fit, ensuring you maintain your margins while meeting customer and market demands.

- Comprehensive pricing matrix
- Flexible pricing
- Contract-/job-based pricing
- Promotional pricing
- Second pass discounting
- Changes and exceptions
- Sales analysis
- Pricing service

Inventory Management

Balance your customer service needs while maximizing your return on investment with advanced inventory management capabilities.

- Multiple inventory replenishment methods
- Dynamic purchasing methods
- Advanced demand forecasting
- Seasonal usage forecast
- Regional distribution centers
- Transfer surplus items between branches
- Bin management
- Lead-time per item per location
- Convert non-stock items to stock items
- Container receipt tracking
- Vendor-managed Inventory
- Distributor-managed inventory
- Vendor returns
- Sporadic inventory managment

Purchasing

Prophet 21 centralizes the purchasing process, enabling you to optimize buying power and inventory levels—whether you have one warehouse or dozens.
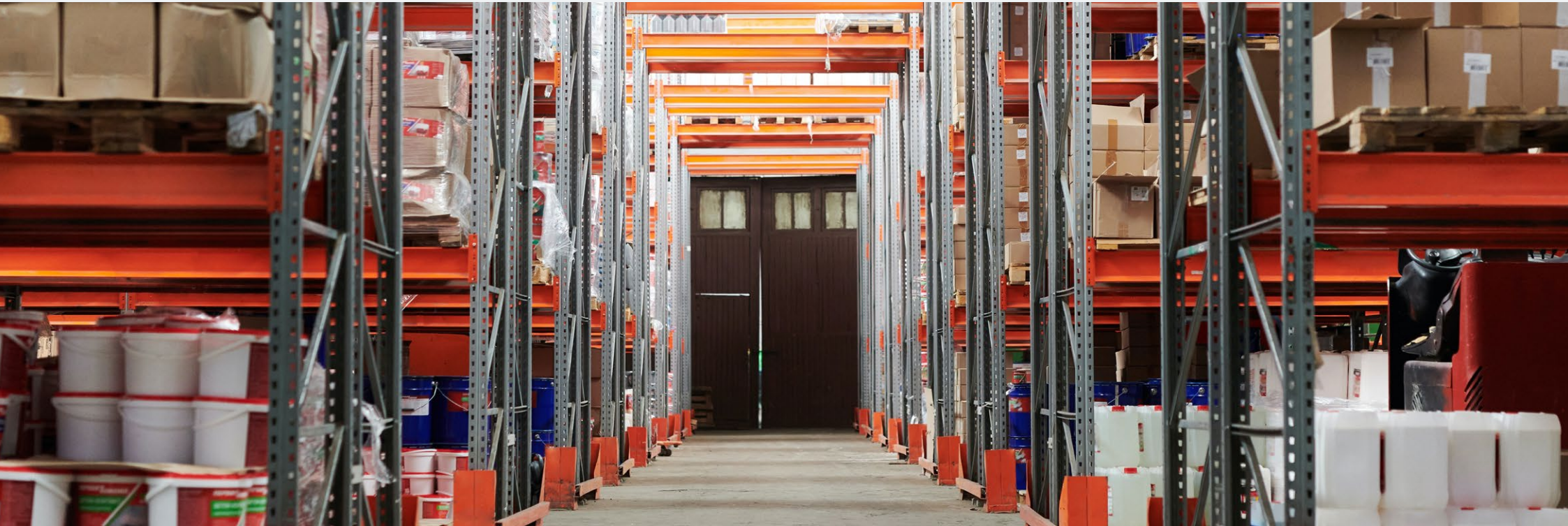
- System-recommended replenishment
- Choose from multiple purchasing options
- Generate purchase orders for rush and drop shipments—from purchasing or order entry
- Compute landed cost
- Distribute freight to item cost by weight and/or quantity
- Track vendor rebate programs
- Create and track vendor RFQs

Warehouse Management

Warehouse Manager is a paperless warehouse solution for Prophet 21 that brings a new level of accuracy to all warehouse processes.

- Picking
- Receiving
- Cross-docking
- Put-away
- Real-time cycle counting
- Label printing and bar coding
- Tagging/license plating
- Bin replenishment
- Flexible device options

"Because Epicor is developing the technology solutions that we will need 5-10 years from now, this frees us up to do what we do best. We trust in the Epicor expertise... with Epicor, we know we have a partner that will support our growth and profitability, and allow us to stay ahead of the competition. I feel totally comfortable that we´re in the right place, and will have a relationship for many years to come."

Vicki Hafele, Chief Financial Officer
Duncan-Parnell Inc.

EPICOR

We're here for the hard-working businesses that keep the world turning. You're the companies that make, move, and sell the things we all need. Trust Epicor to help you do business better. Your industry is our industry, and we understand you better than anyone. By working hand-in-hand, we get to know your business almost as well as you do. Our innovative industry solution sets are carefully built to fit your needs and respond flexibly to your fast-changing reality. We accelerate ambitions, whether you want to grow and transform, or simply become more productive and effective.

That's what makes us the essential partner to the world's most essential businesses.

Contact Us Today: info@epicor.com | www.epicor.com