

EPICOR ERP

EPICOR

Discrete Manufacturing

Engineer-to-order Manufacturing

Mixed-mode Manufacturing

Financial Packages

Ted Rohm, Senior ERP Analyst | February 2020

TEC CERTIFICATION REPORT

TEC Certification Reports provide detailed analysis of leading software solutions that have successfully completed TEC's Certification Program.



Table of Contents

About This Report	2
Industry-Specific Solutions Infused With The Latest Software Technology	3
Benchmark Results for Epicor ERP	5
Reading the TEC Focus Indicator	6
Product Review: Epicor ERP	11
TEC Analyst Observations on Epicor ERP	18
Detailed Functionality Graphs for Epicor ERP	19
Epicor ERP for Discrete Manufacturing	21
Epicor ERP for Engineer-to-order Manufacturing	28
Epicor ERP for Mixed-mode Manufacturing	36
Epicor ERP for Financial Packages	44

About This Report

Product: Epicor ERP

Version: 10.2.500

Release date: October 2019

Certification by:

Ted Rohm, Senior ERP Analyst, Technology Evaluation Centers

Demonstration conducted by:

James Frye, Senior Principal Solutions Engineer, Epicor Software

Technology Evaluation Centers (TEC) is pleased to announce that Epicor ERP by Epicor is now TEC Certified for online evaluation of ERP solutions for discrete manufacturing, engineer-to-order (ETO) manufacturing, and mixed-mode manufacturing in the ERP Evaluation Center, as well as for online evaluation of financial packages in the Financials evaluation model. The TEC Evaluation Centers enable you to compare and evaluate functionality based on TEC's comprehensive models of business software. Data used in the Evaluation Centers are obtained from the vendors' responses to TEC's research questionnaire. Certification ensures that Epicor has demonstrated Epicor ERP's support for specific real-world business processes chosen by TEC analysts, and that TEC analysts have analytically and comparatively reviewed research questionnaire data about Epicor ERP against known benchmarks.

Industry-Specific Solutions Infused With The Latest Software Technology

Epicor's industry-focused enterprise resource planning (ERP) solution has a long heritage of providing deep capabilities for mid-market manufacturers in discrete manufacturing. Epicor ERP has been serving industries that require more complex manufacturing operations for more than 40 years. The solution brings together a compelling combination of these deep capabilities, a next-generation Kinetic user experience, and leading-edge technologies (such as the EVA digital assistant, Internet of Things (IoT) connections, artificial intelligence available in the cloud)—all at a very accessible price.

Epicor is a global ERP solution provider based in Austin, Texas. The company has approximately 40 offices distributed across the Americas (13 offices), Europe, Middle East and Africa (12), Asia (11), and Australia and New Zealand (4). Overall, the company has a presence in more than 150 countries and runs its software in 30 languages.

Epicor ERP is a best fit for industrial machinery; fabricated metals; electronics and high tech; measuring and controlling devices; aerospace and defense; furniture and fixtures; and medical devices. The system can support other industries and has customers across a wide range of other manufacturing industries and even non-manufacturing industries. Epicor ERP users include companies in professional services, consumer goods manufacturing, automotive manufacturing, chemical manufacturing, food and beverage manufacturing, packaging manufacturing, and other goods and services industries.

Epicor ERP's market focus is for mid-market customers but the software is used by customers ranging in size from very small businesses with 1–19 employees to much larger installations with more than 2,500 employees (figure1).

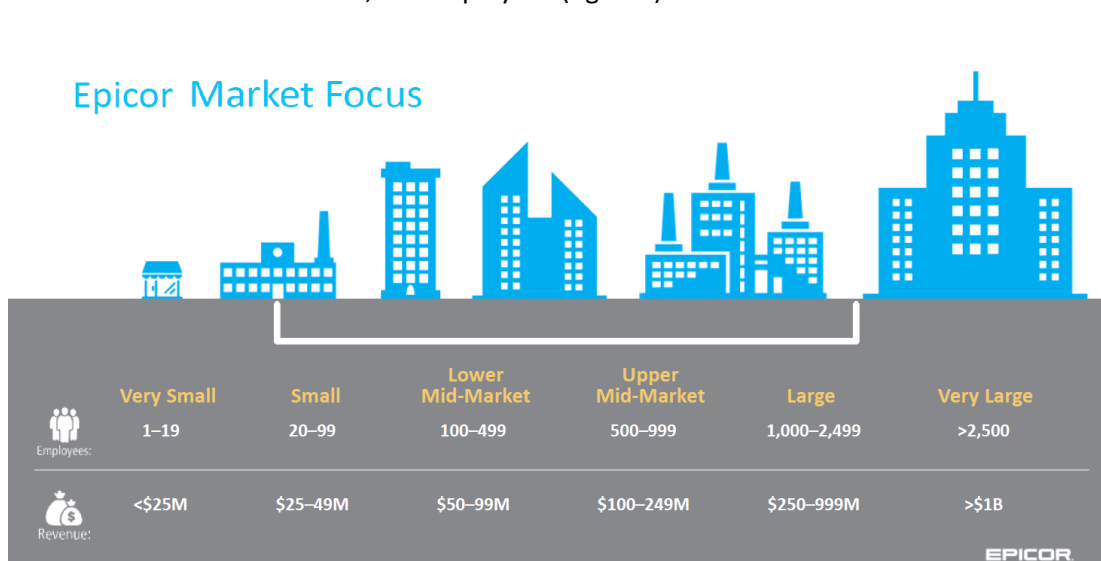


Figure 1. Epicor market focus

Epicor ERP's strength is serving industries that require more complex discrete manufacturing processes. These include engineer-to-order (ETO), make-to-order (MTO), and configure-to-order (CTO) processes. The application can of course support assemble-to-order (ATO) and make-to-stock (MTS) modes of production. However, Epicor ERP does not support process manufacturing or batch-oriented manufacturing extensively.

Benchmark Results for Epicor ERP

The TEC Focus Indicator presents the results of benchmarking Epicor ERP against an **Industry Average**. TEC calculates the industry average for a given software market space based on product data from real-world software solutions, scoring solution support for hundreds to thousands of features and functions. The Industry Average circle in the middle of the graph is a normalized representation of the average of the scores.

- The Focus Indicator represents neither the quality of the product nor an absolute quantity of supported functionality. Rather, the **graph is normalized** to show *support relative to the average quantity of functionality supported*.
- The functional criteria have been equalized (attributed equal weight).
- High and low thresholds have been set in order to create the “Dominant,” “Competitive,” and “Minimal Support” zones (see below for more details).

Reading the TEC Focus Indicator

The axes represent the main modules of a typical ERP product and the red dots show the relative support of the product compared with the Industry Average. The closer a red dot is to the center, the more functionality the product supports for that module.

The **Industry Average circle** marks the relative support of the average ERP product within the indicated market space.

The **Dominant Zone** (green) shows where the product supports more functionality than the average solution. Dominant modules are likely to be competitive differentiators for the vendor.

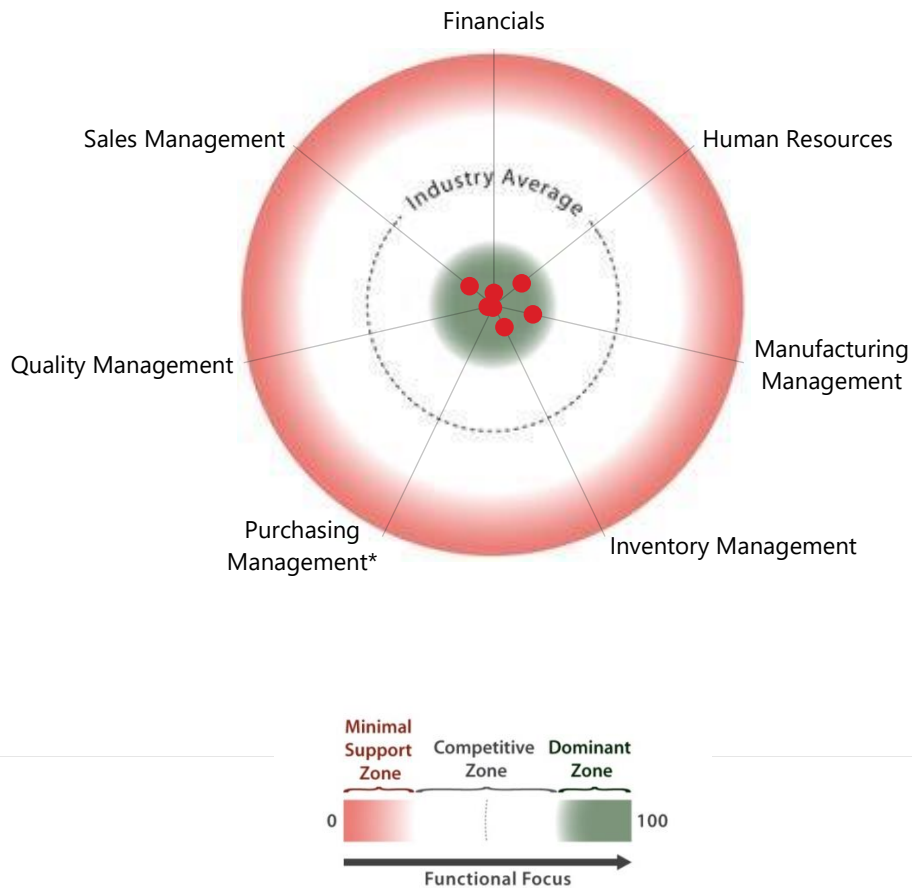
The **Competitive Zone** (white) shows where the product supports about the same amount of functionality as the average solution. This typically indicates that most vendors in this market space support this functionality.

The **Minimal Support Zone** (red) shows where the product supports less functionality than the average solution. Minimal Support modules might indicate less of a focus for this functionality, as it may not have as much of an importance within the vendor's target market.

If your needs correspond to modules ranked closer to the center of the Focus Indicator, Epicor ERP may be an application worth evaluating.

Epicor ERP for Discrete Manufacturing

This **TEC Focus Indicator™** shows you which types of functionality are likely differentiators for the Epicor ERP application in the discrete manufacturing software space.



*The module scored in the maximum range for functionality.

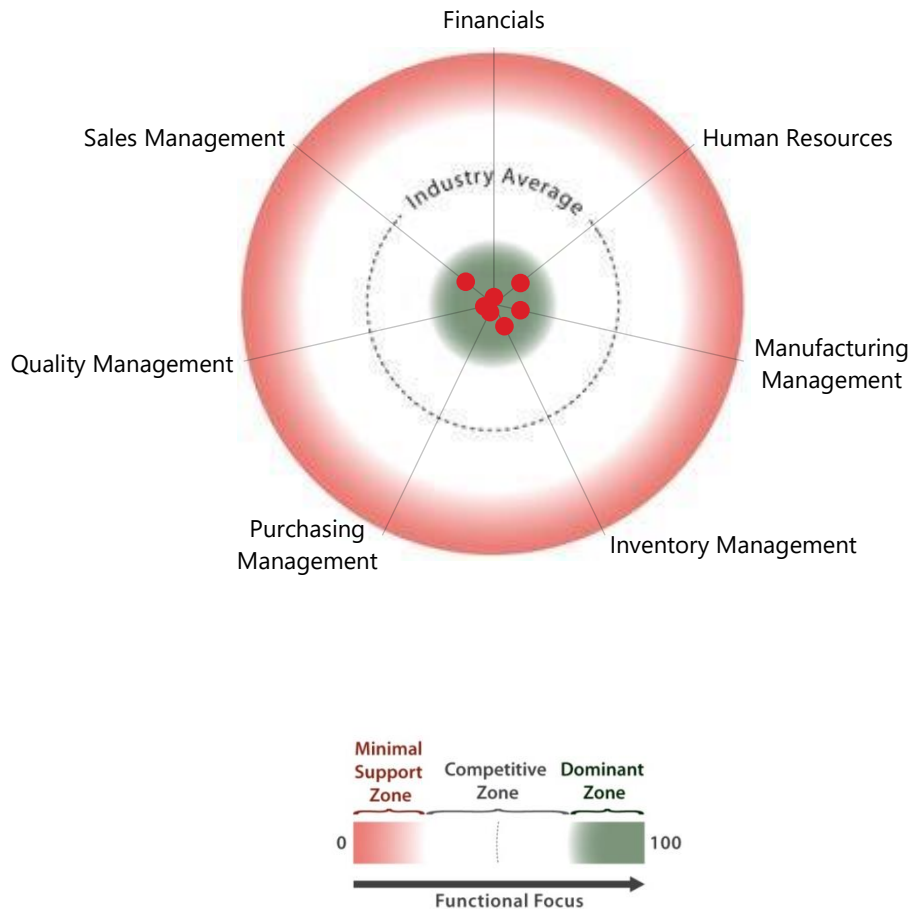
TEC Focus Indicator Epicor ERP for Discrete Manufacturing

ERP for discrete manufacturing includes functionality that addresses the specific requirements of manufacturing distinct items. It supports a company's full cycle of manufacturing in a discrete environment.

Use TEC Advisor to compare Epicor ERP with other discrete manufacturing solutions, according to your organization's needs and characteristics. [Compare now](#).

Epicor ERP for Engineer-to-order Manufacturing

This **TEC Focus Indicator™** shows you which types of functionality are likely differentiators for Epicor ERP application in the engineer-to-order (ETO) manufacturing software space.



*The module scored in the maximum range for functionality.

TEC Focus Indicator for Epicor ERP for ETO Manufacturing

ERP for engineer-to-order manufacturing supports the requirements of companies that manufacture products based on their customers' designs. It is based on discrete ERP but incorporates specific project-based manufacturing functionality.

Use TEC Advisor to compare Epicor ERP with other ETO manufacturing solutions, according to your organization's needs and characteristics. [Compare now](#).

Epicor ERP for Mixed-mode Manufacturing

This **TEC Focus Indicator™** shows you which types of functionality are likely differentiators for the Epicor ERP application in the mixed-mode manufacturing software space.



*The module scored in the maximum range for functionality.

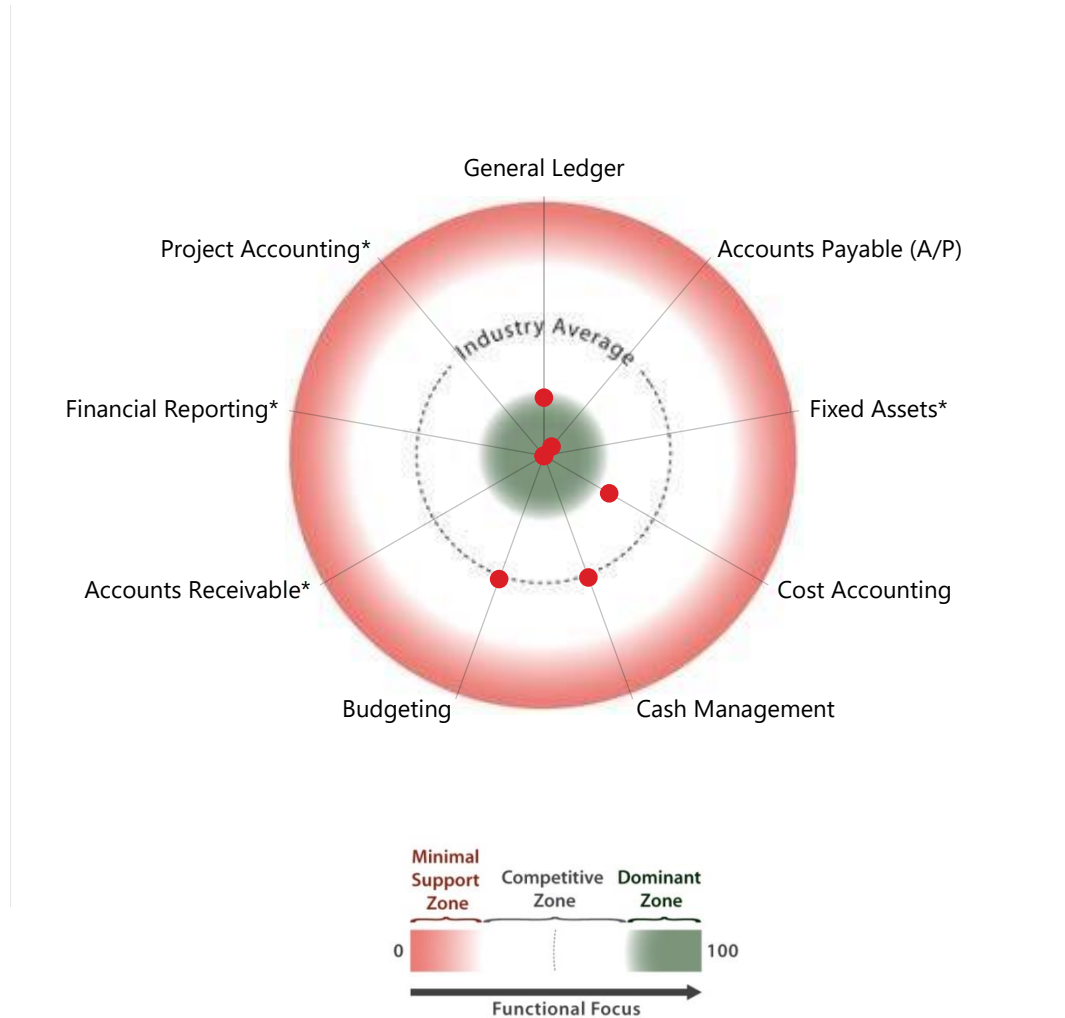
TEC Focus Indicator for Epicor ERP for Mixed-mode Manufacturing

ERP for mixed-mode manufacturing gives organizations the agility to handle both discrete manufacturing (production of distinct items) and process manufacturing (which uses formulas or recipes).

Use TEC Advisor to compare Epicor ERP with other mixed-mode manufacturing solutions, according to your organization's needs and characteristics. [Compare now](#).

Epicor ERP for Financial Management

This **TEC Focus Indicator™** shows you which types of functionality are likely differentiators for the Epicor ERP application in the financial management software space.



*The module scored in the maximum range for functionality.

TEC Focus Indicator for Epicor ERP for Financial Packages

Financial packages and accounting systems manage procedures for accurately entering, tracking, and maintaining information related to an organization's financial operations. These applications include typical accounting and financial management functionality such as general ledger, accounts payable and accounts receivable, payroll, job and project costing, and multinational accounting.

Use TEC Advisor to compare Epicor ERP with other financial management solutions, according to your organization's needs and characteristics. [Compare now](#).

Product Review: Epicor ERP

Epicor ERP was presented to TEC in a multi-hour, scripted demonstration. James Frye, Senior Principal Solutions Engineer at Epicor Software, demonstrated the latest version of the Epicor ERP solution to TEC as part of the product certification process. During the first part of the product demonstration, Epicor was tasked with showing the product's user interface, usability, customization features, and underlying business platform support such as reporting, document management, and business process management (BPM). In the second part of the demonstration, Mr. Frye showed the live execution of a suite of real-world business process scenarios centered around mega business processes including procure to pay, quote-to-cash, and inventory management.

User Experience

Fit and Finish

Epicor Kinetic Design is Epicor's user experience platform. It is a multi-pronged cross-platform user experience (UX) framework that is being applied across the Epicor applications including Epicor ERP. The kinetic design platform principles and tools have been are being applied across the Epicor ERP solution. This review will report on only the latest version of the application as demonstrated.

The Kinetic Design user experience has a very modern and elegant look and feel. An overriding goal of the Kinetic experience is to transform how users interact with the software in order to simplify their everyday tasks. Figure 2, the homepage, is an example of a screen that has been "kineticized".

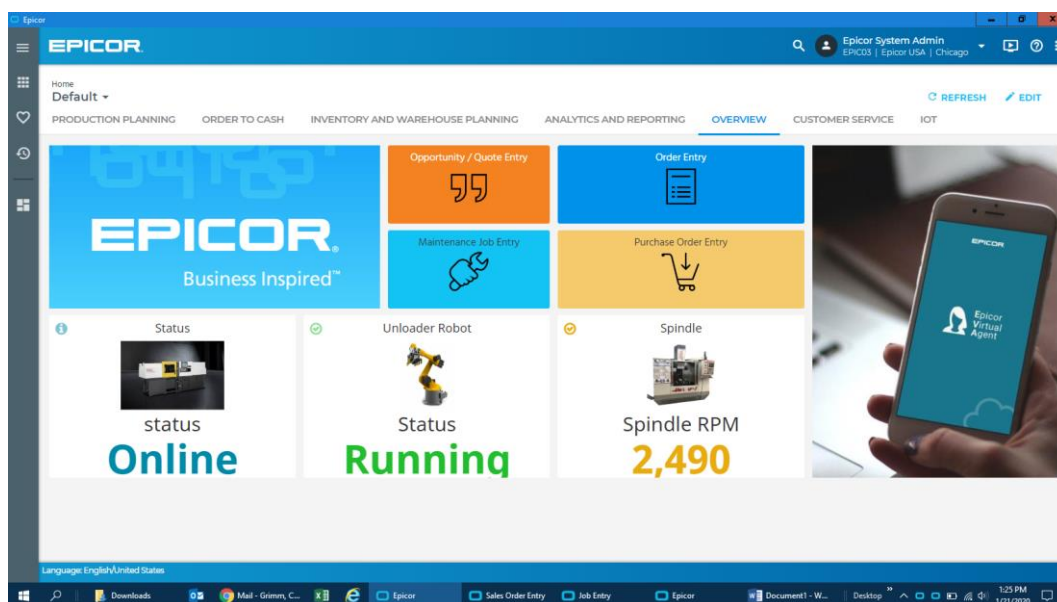


Figure 2. Epicor homepage



Figure 3. Enterprise Search screen

The Enterprise search allows a user to search across the entire system to quickly find all objects that match the search results (figure 3). For example, a user can enter an invoice number and search across the entire system for matching data. The system brings back the data that matches the invoice entered. If there were data from multiple database objects that match the search, then the different objects would be tagged in the returned search. From the set of results displayed, the user can right-click on a hyperlinked item to see the list of functions that a user can move to from the displayed search result.

Epicor Knowledge Mentor

Users have access to a detailed knowledge base from within the system. The knowledge base provides detailed, step-by-step instructions detailing the best practices for a particular business process. Epicor provides additional training and education tools available to its customers. A power user can record a process and add their own business' unique twists to the process.

Business Platform Tools and Capabilities

The Epicor ERP system delivers a full complement of platform tools to support business operations. The base platform of an application system starts with infrastructure (hardware, servers, and network devices) and adds additional platform layers such as the operating system and database platforms on top of this infrastructure. There is an additional set of tools that is needed to support an enterprise application. This includes tools for document management; reporting, analytics, and business intelligence (BI); business process management; digital assistants; and enterprise social collaboration. At TEC, we have coined the term business platform capabilities to categorize these additional tools.

Dashboards and Analytics

Epicor ERP has two primary tools for reporting and analytics in the system: 1) Embedded trackers and dashboards, and 2) Epicor data analytics (EDA). The tracker and dashboards

tools are for day-to-day view of the data. The data analytics tool is for getting a bigger picture of the business and doing higher-level analysis. Analytics gives a more strategic view of trends over time. The system is delivered with a large suite of prebuilt operational reports, dashboards and analytics examples.

The trackers and dashboards are built to be easy to use and just as importantly be easy to create. Epicor has made creating dashboards extremely easy. There are only two steps to creating a dashboard: to build first the query and then the dashboard to display the data retrieved by the query. The query is created using the business activity query (BAQ) designer. In the BAQ designer, the user can drag and drop fields into the query. The user can also create other information to display such as a sum of values and calculations based on the data. The system automatically builds the query for the user. The second part is to create the new dashboard using the dashboard designer.

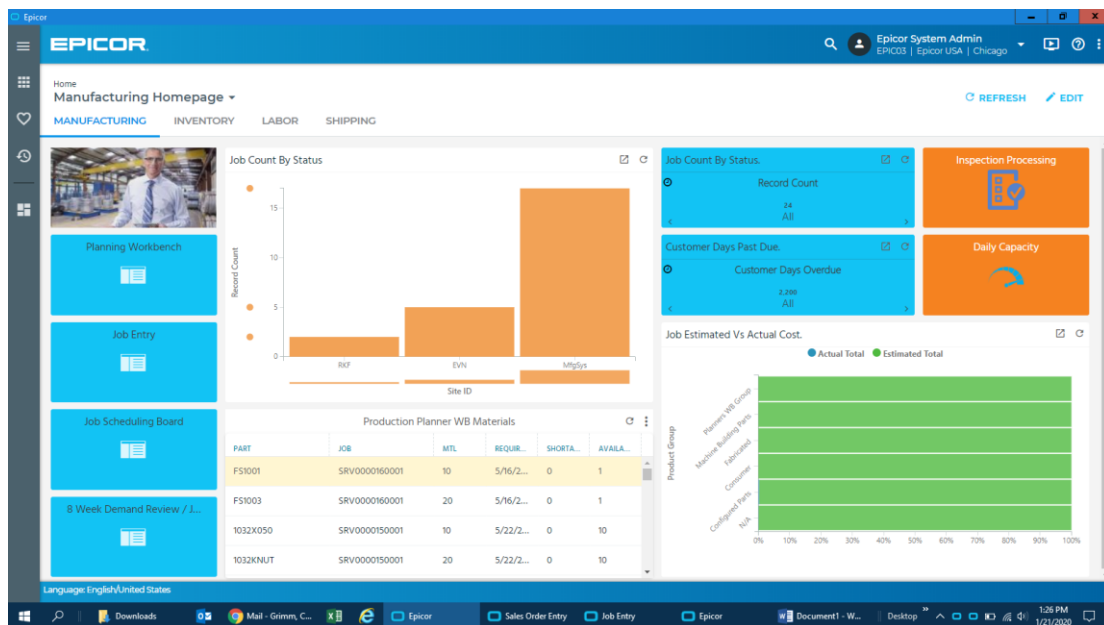


Figure 4. Manufacturing homepage

The dashboard designer is also very easy to use. The user simply enters the name of the query built in step one. The user can then perform additional calculations, add rules such as highlighting important information, or add a chart to the dashboard. The dashboard shown in figure 4 was created in just a few minutes. A user can now deploy this new dashboard on the screen or for a mobile device. The dashboard can be run on any device and it resizes to fit on the device.

The first problem when creating one's own reports is finding out the underlying database table and field name behind the data being displayed. This table and field name are then used in creating the report. In Epicor ERP, this database table and field information is found easily enough by selecting the field help. The field help window displays all the technical details for the field, along with the help text for the field. All anyone needs to know when

creating a report is where the data resides (table and field) and how they want to display the information. This is all the “technical” know-how needed to build your own reports.

Epicor has a full suite of business intelligence and analytics tools to meet all of an enterprise’s needs. They range from the operation reports and dashboards to the more sophisticated analytics tools. Epicor analytics is a full-featured analytics tool for working with large data sets and displaying the data visually, as shown in figure 5.

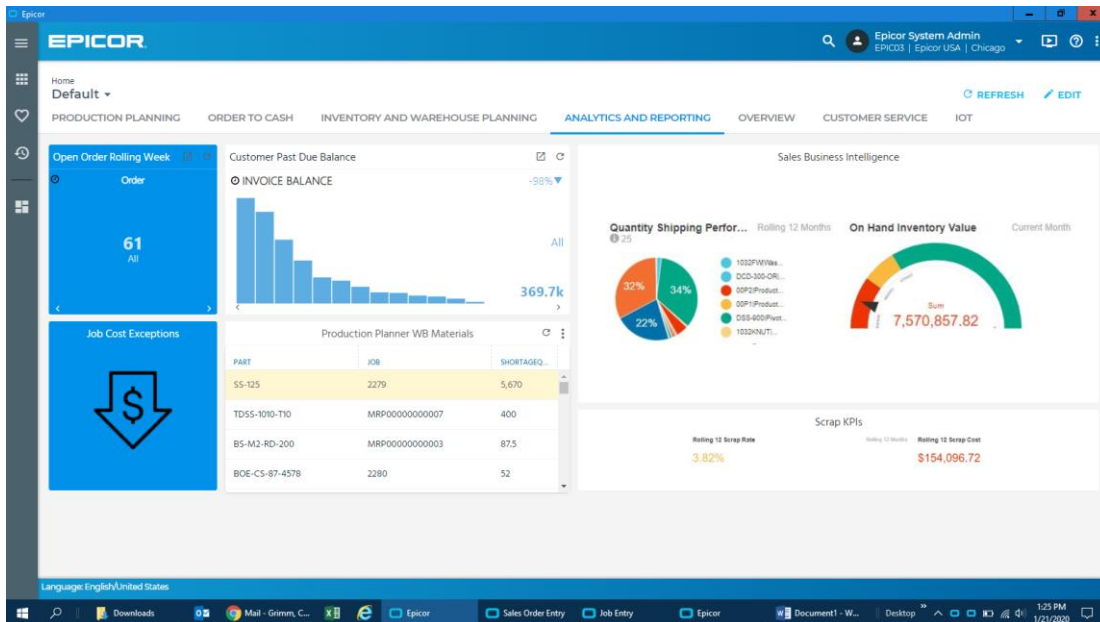


Figure 5. Epicor analytics and reporting dashboard

Note: There are other reporting tools available including a financial reporting tool for detailed financial reporting, and the Epicor XL Connect product for those who wish to use Excel.

Epicor Collaborate

Epicor Collaborate is an enterprise social collaboration tool. It lets users collaborate with each other in the familiar social media environment. Users can follow orders, people, and processes the same way they follow topics on social media. Users can collaborate in real time and reference the relevant business objects and events. The tool brings collaborative engagement with the context of the associated business object. As users are working in Epicor ERP, they can easily start a conversation on a business topic. This provides a social means of communication in the business environment.

Epicor Virtual Assistant—EVA

Epicor Virtual Agent (EVA) is a digital agent designed to help users work smarter. The tool is similar to other virtual digital assistants on the market such as Apple’s Siri or Amazon’s

Alexa. The assistant uses natural language processing (NLP) to interact with the user. The EVAs in ERP systems are currently being used to handle relatively simple tasks such as requesting time off, entering timesheets, or providing latest business results. The skills of this and other digital assistants will continue to grow and will start to replace many common interactions with the ERP system.

Manufacturing Execution System (MES)

Epicor ERP manufacturers use Epicor Advanced MES to improve quality, reduce scrap, help ensure on-time delivery, and boost production throughput. Epicor Advanced MES can improve profitability by helping users find more capacity. Epicor Advanced MES collects data directly from equipment and operators on the shop floor in real time, minimizing inaccurate and time-consuming manual data collection (figure 6). With information instantly in hand, an operator can anticipate and solve production problems before they happen. Real-time insight helps users pinpoint critical issues, reduce waste, and improve quality and customer service. Everyone in the plant and throughout the business can take action to improve manufacturing performance.

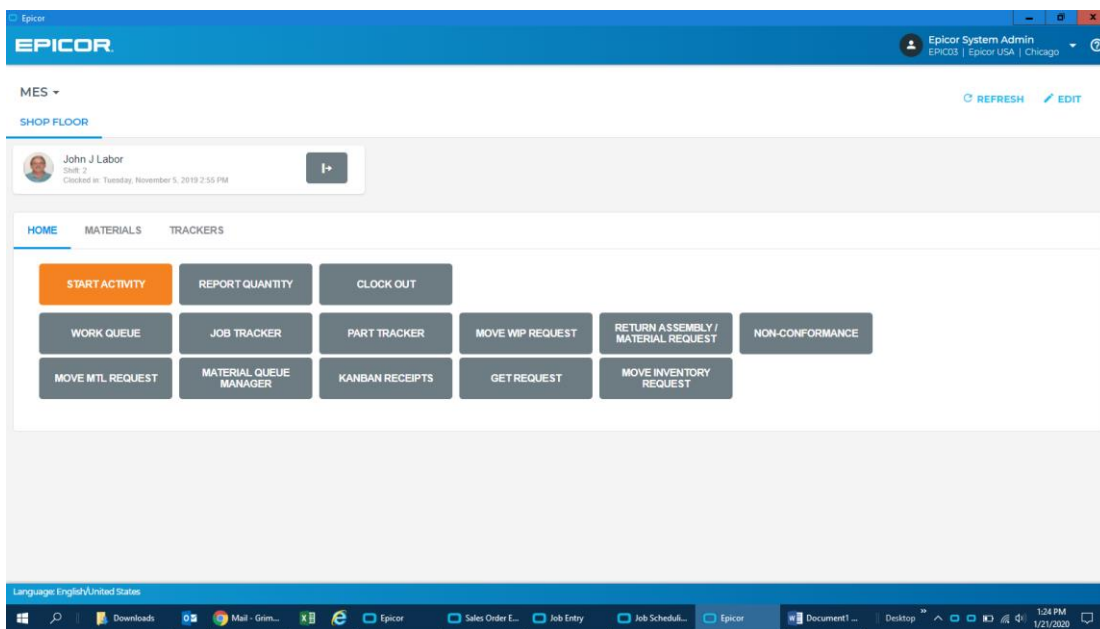


Figure 6. Manufacturing execution system

Internet of Things (IoT)

The Internet of Things (IoT) allows manufacturers to connect their systems, sensors, machines, and people. Epicor ERP users can more easily capitalize on this increasingly essential capability with Epicor IoT. Epicor IoT leverages the power of Microsoft Azure IoT Hub with the context and in-depth data of Epicor ERP. With Epicor IoT, users get intelligent insight into the operations and day-to-day activities. Epicor IoT enables monitoring of

equipment, assets, environmental factors, inventory locations, and their corresponding IoT data. Events and data—such as sensor and machine telemetry—flow into the Azure IoT Hub. From there, the data propagates to the IoT module of the Epicor ERP solution. Epicor IoT has an advanced rule-based engine that can detect patterns and raise alerts and notifications that propagate into Epicor ERP, where they can be used to trigger business process changes such as raising a maintenance suggestion when equipment degradation is detected.

Document Management and Business Process Management (BPM)

Epicor recently acquired DocStar to be its enterprise content management solution. Most manufacturers cannot operate effectively without a full-featured enterprise content management solution. DocStar allows users to store, retrieve, edit, version, tag, and manage all the business documents. When a document is saved to Epicor ERP, all the metadata is automatically attached to the document. DocStar is a separate product but has been tightly integrated into Epicor ERP.

Epicor ERP also has a full-featured business process management (BPM) tool. BPM tools are used to monitor system events, evaluate conditions, and send alerts or take actions based on the condition. Business events such as orders with excessive discounts or customers going over their credit limit are common places where BPM tools are applied. The BPM tool within Epicor ERP is a very easy-to-use and full-featured BPM solution.

Support of Processes

Of course, an ERP system such as Epicor ERP can be used for thousands of tasks. Evaluating how any single ERP system handles a particular business' processes requires a well-designed and planned demonstration. At a minimum, ERP demonstrations for system evaluation should take multiple days. However, the brief, multi-hour demonstration given by Epicor reveals why it has been the choice for hundreds of organizations over decades. Built into Epicor ERP is a lot of what one might call last-mile functionality to support manufacturers. Below are the highlights of just a few of these last-mile capabilities.

Product configurator fully embedded into ERP software. A product configurator is used to drive the creation of custom quotes and orders. Some ERP providers rely on third-party product configurators or configure, price, quote (CPQ) solutions for this task. Epicor's product configurator is fully embedded and can automatically create the appropriate bill of materials (BOM) and manufacturing routings needed for the manufacture of a new customer product for ETO, CTO, MTO, and other custom manufacturing processes.

From the opportunity, the sales order is created with a single click. When this sales order is released, Epicor ERP creates three different actions to fulfill this order. It creates the purchase order to acquire the product, the manufacturing job for the custom manufacture,

and an inter-company transfer to bring material from the other warehouse.

Procure-to-pay process—The procurement process is one of the most, if not the most, important business process for manufacturers. Manufacturers must manage every aspect of the process. Suppliers need to be managed via **supplier relationship management (SRM) analytics**. Figure 7 is an example of an SRM cockpit. The SRM cockpit keeps track of a number of ratings on a supplier including the on-time rating, service rating, and quality rating. Of course, all of these ratings can be adjusted to fit a company's unique requirements.

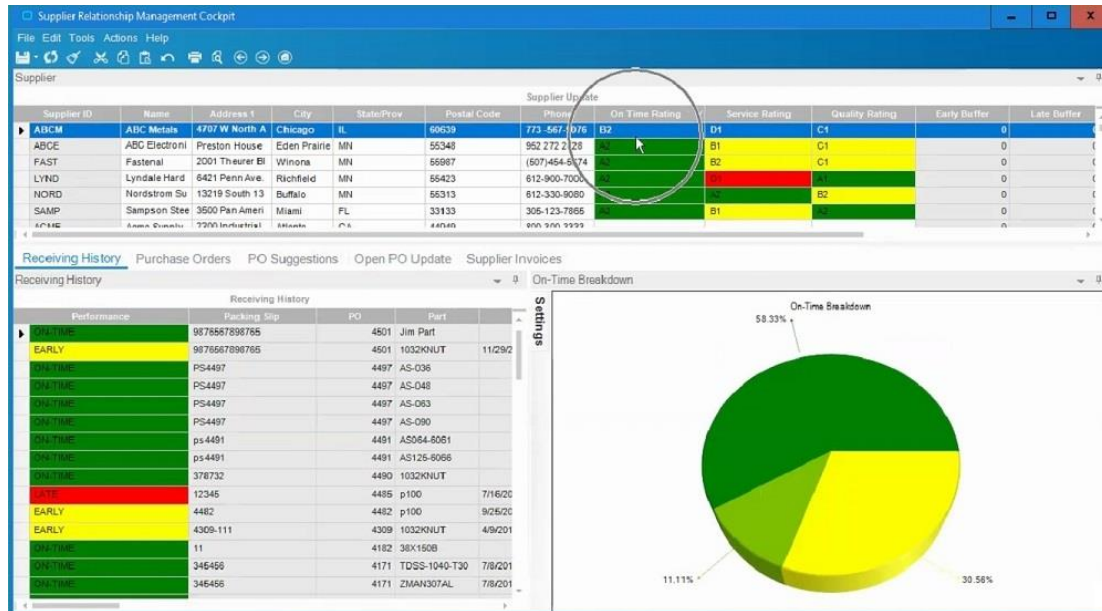


Figure 7. Supplier relationship management (SRM) cockpit

During the procure-to-pay process, purchase orders need to be received and processed in a number of ways and as efficiently as possible. Epicor ERP can process single- and multiple-step receipts on POs. Having visibility into the status of POs is extremely important to Epicor's customers. There are PO status dashboards for monitoring and aiding in the processing of purchase orders.

There are many other little details that are part of Epicor ERP for managing all these last-mile details. Many of the newer entrants to the ERP market cannot match the depth of functionality available in Epicor ERP.

TEC Analyst Observations on Epicor ERP

Epicor ERP has long delivered deep, industry-specific functionality to its manufacturing customer base. The solution is built to support the needs of some of the more complex discrete manufacturing customers. As this report shows, Epicor ERP is a highly competitive manufacturing ERP solution in what is a highly competitive marketplace. There are many ERP solutions for discrete manufacturing, but the number drops significantly when one starts to look at the custom, to-order manufacturing solution providers.

Epicor ERP scores in the dominant zone in all the modules within TEC's ERP model for discrete and ETO manufacturing, including: Financials; Manufacturing Management; Inventory Management; Purchasing Management; and Sales Management. Though in TEC's mixed-mode manufacturing model, which is a combination of discrete and process manufacturing, Epicor admittedly does not provide strong support for process and/or batch-mode manufacturing.

Epicor has been serving customers on a global scale for what is now some 45 years and is now being positioned to support customers for another 45 years. Epicor is financially sound and ready to continue to grow and invest in its solutions to meet its customers' needs. Though a private company, Epicor is reported to have a total close to \$1 billion (USD) in annual revenues. The recent acquisition by Kohlberg Kravis Roberts & Co. shows that it is a company with solid business fundamentals that will be here for many years to come.

The recent releases of Epicor ERP show that the company is fully committed to keeping pace with the forces of digitization and bringing the latest technologies to its customers. The Kinetic Design experience, along with mobile, social, and AI skills, delivers a user experience that is on par with its rivals. The overall application continues to be built out functionally beyond core ERP processes in support of manufacturing requirements such as quality management, warehouse management, and field service by the recently released Epicor Service Pro.

When it comes down to selecting a manufacturing ERP solution, Epicor is almost always part of the decision matrix. There was a period of time where Epicor was, rightfully, seen as dropping behind the competition in some of the newer technology areas. However, that time is now in the rearview mirror. The latest technological and financial injections should make Epicor ERP part of every discrete manufacturer's ERP shortlist.

Detailed Functionality Graphs for Epicor ERP

The following functionality benchmark graphs represent the quantity of support by Epicor ERP for the functionality within each module identified in the TEC Focus Indicators, on a scale of 0 to 100 points. The closer the plotted value is to 100 (toward the outside in spider graphs and the top of bar graphs), the more functionality Epicor ERP supports. The functionality of Epicor ERP is shown in blue; an average of what competitor solutions offer is shown in red.

Discrete Manufacturing

Financials.....	21
Human Resources	22
Manufacturing Management	23
Inventory Management	24
Purchasing Management	25
Quality Management	26
Sales Management.....	27

Engineer-to-order Manufacturing

Financials.....	28
Human Resources	29
Manufacturing Management	30
Inventory Management	32
Purchasing Management	33
Quality Management	34
Sales Management.....	35

Mixed-mode Manufacturing

Financials.....	36
Human Resources	37
Discrete Manufacturing Management	38
Process Manufacturing Management	39
Inventory Management	40
Purchasing Management	41
Quality Management	42
Sales Management.....	43

Financial Packages

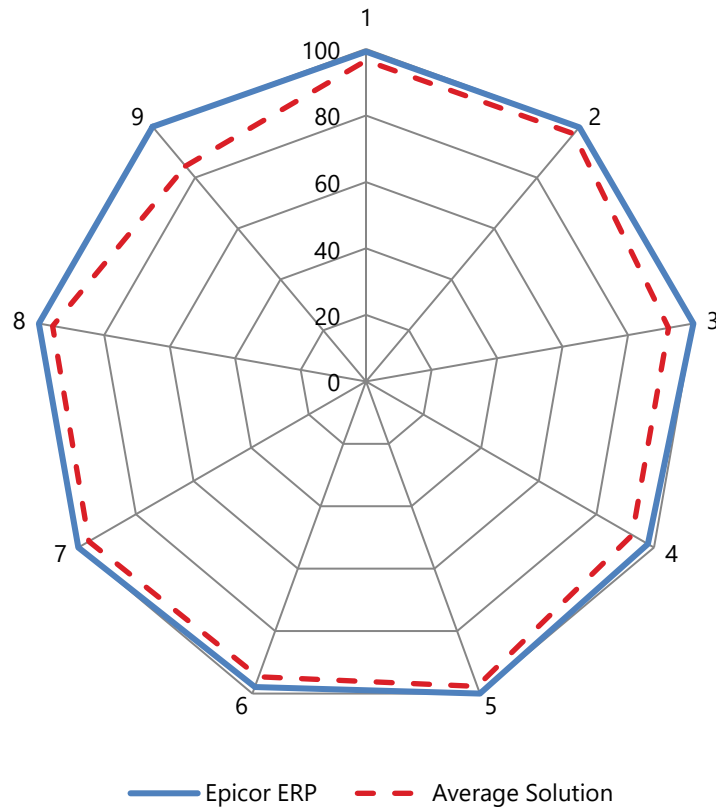
General Ledger.....	44
Accounts Payable (A/P)	45
Fixed Assets.....	46
Cost Accounting	47
Cash Management	48

Budgeting	50
Accounts Receivable (A/R)	51
Financial Reporting	52
Project Accounting	53

Epicor ERP for Discrete Manufacturing

Financials

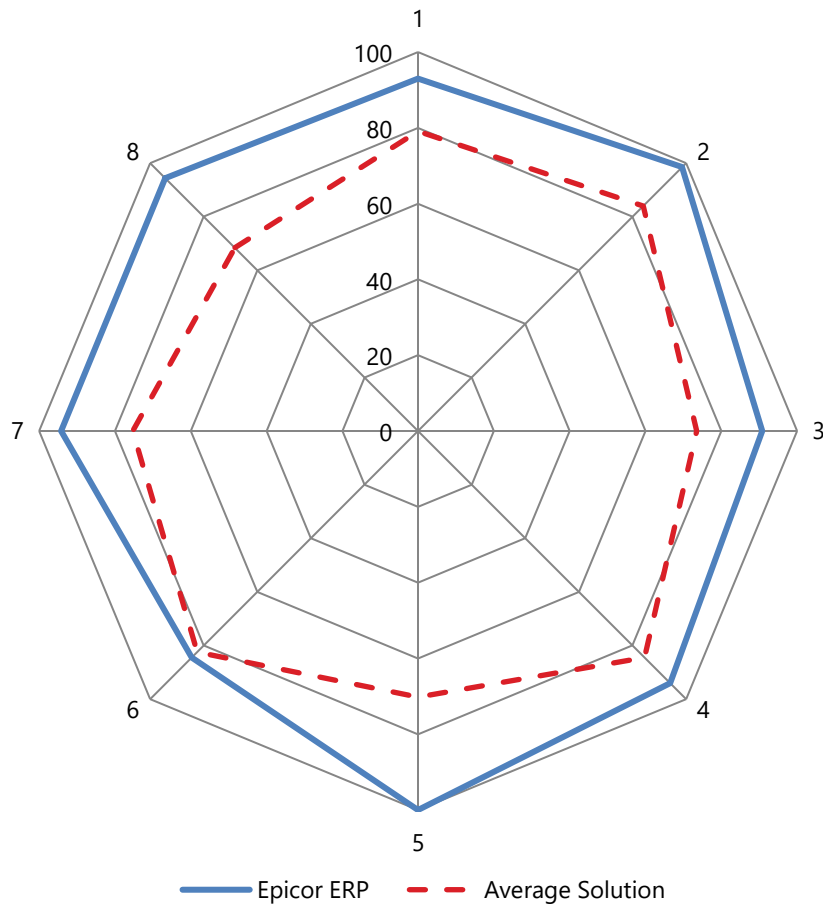
The Financials module provides features and functions that allow accountants and financial managers to ensure financial transactions are tracked and properly recorded, and that this information is available via reports and other data retrieval tools. Traditionally, this module includes the General Ledger, Accounts Payable, Fixed Assets, Cost accounting, Cash Management, Accounts Receivable, and Financial Reporting submodules.



Criteria	Epicor ERP Score	Average Score
1 General Ledger	99.2	96.5
2 Accounts Payable (A/P)	99.8	97.2
3 Fixed Assets	100	92.4
4 Cost Accounting	97.9	92.5
5 Cash Management	100	97.7
6 Budgeting	97.9	94.6
7 Accounts Receivable	100	96.3
8 Financial Reporting	100	95.8
9 Project Accounting	100	84.5

Human Resources

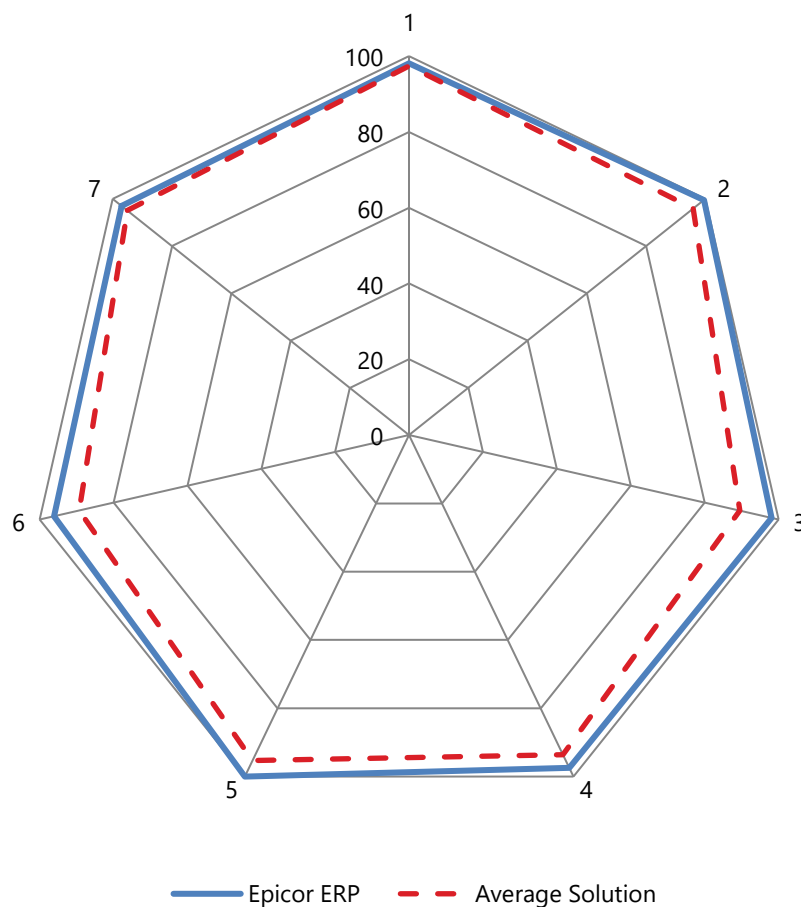
Human Resources management encompasses all the applications necessary for handling personnel-related tasks for corporate managers and individual employees. Submodules include Personnel Management, Benefits, Payroll, Employee Self-Service, Employee Metrics, Health and Safety, Workforce Management, and Training.



Criteria	Epicor ERP Score	Average Score
1 Personnel Management	93.0	79.1
2 Benefits	98.5	84.0
3 Payroll	90.8	73.5
4 Employee Self-Service	94.1	84.5
5 Employee Metrics	100	70.2
6 Health and Safety	84.5	82.5
7 Workforce Management	94.2	75.3
8 Training	94.4	68.4

Manufacturing Management

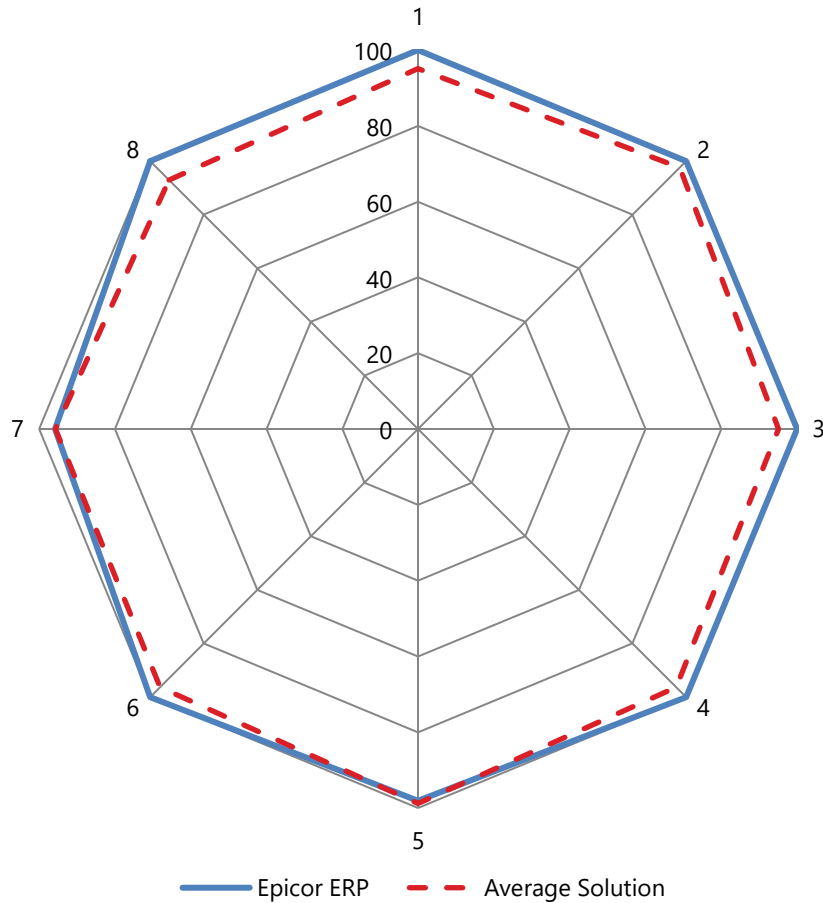
Manufacturing Management covers discrete manufacturing and provides the ability to plan production at various scales, rolling high-level plans down into daily schedules of individual machines and workers, and tracing real-time situations on the production shop floor and in planning to control manufacturing. This ensures that manufacturing facilities follow production plans in an accurate and timely manner, and that manufacturing schedules and operations are altered as required. It involves product configuring, work centers and machines dispatching, all aspects of work-in-progress management, and comprehensive product costing functionality. It also provides a consolidated view of the production situation using extensive multi-level reporting capabilities.



Criteria	Epicor ERP Score	Average Score
1 Product Costing	98.1	97.4
2 Shop Floor Control	99.5	95.9
3 Field Service and Repairs	98.1	89.5
4 Production Planning	97.4	93.6
5 Product Data Management (PDM)	100	95.3
6 Project Management	96.1	89.3
7 Product/Item Configurator	97.0	95.1

Inventory Management

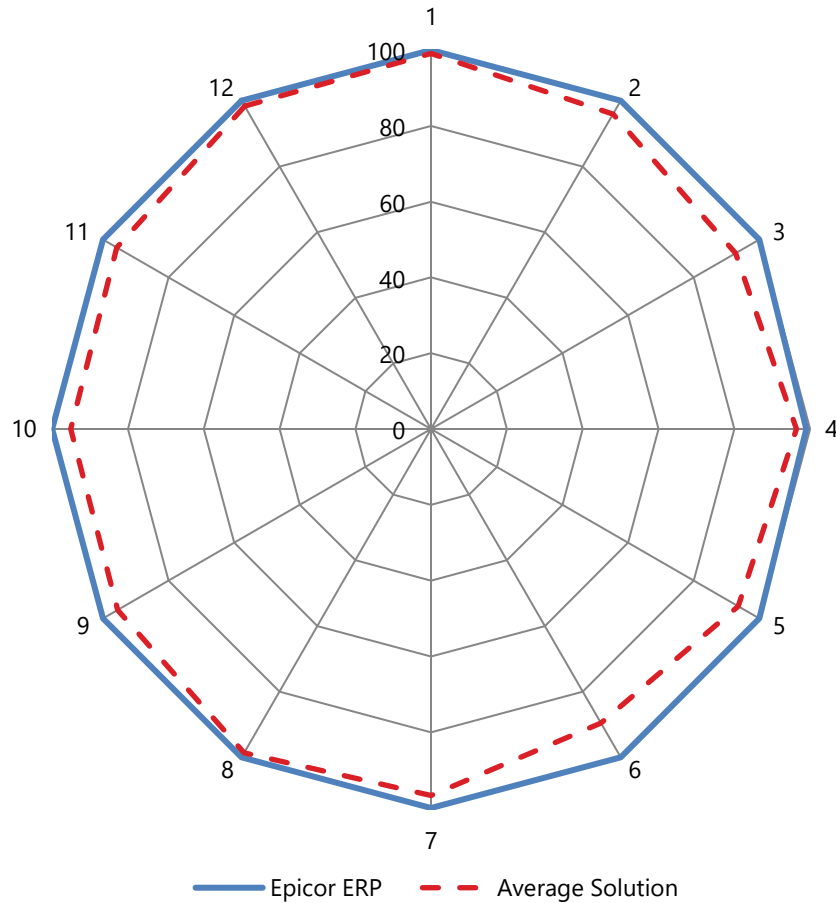
Inventory Management functionality addresses the record-keeping of warehoused goods, and managing the movement of these goods to, from, and through warehouses. Forecasting, finished goods reservation and allocation processes, and inventory adjustments are also a part of this functional module.



Criteria	Epicor ERP Score	Average Score
1 Inventory Management—Online Requirements	100	95.1
2 Processing Requirements	100	97.6
3 Data Requirements	100	95.1
4 Locations and Lot Control	100	96.3
5 Reporting and Interfacing Requirements	98.1	98.8
6 Adjusting Inventory	100	96.3
7 Forecasting	95.8	95.7
8 Reservations and Allocations	100	92.9

Purchasing Management

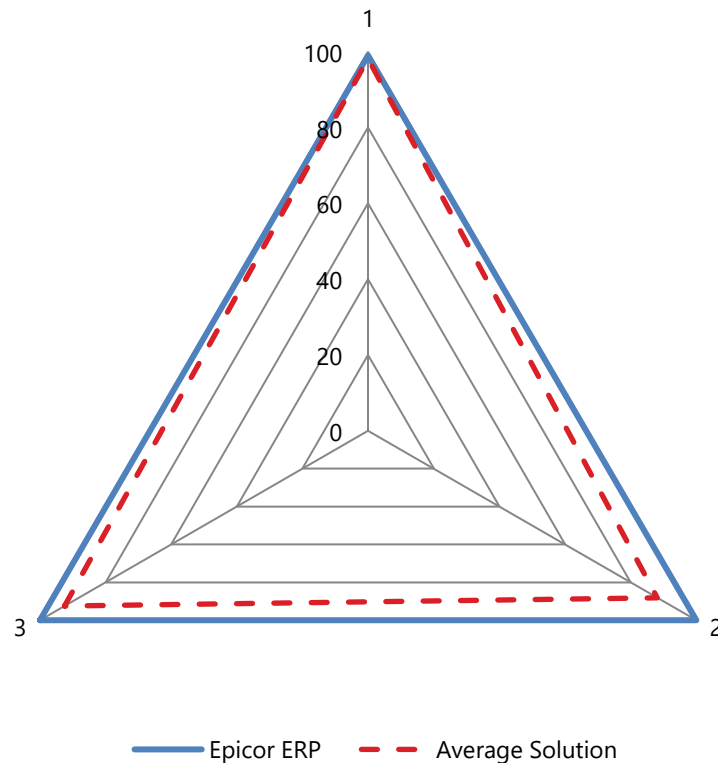
Purchasing Management encompasses a group of applications that controls the purchasing of raw materials and manages inventory stocks. It also involves creating purchase orders/contracts, supplier tracking, goods receipt and payment, and associated regulatory compliance analysis and reporting.



Criteria	Epicor ERP Score	Average Score
1 Profile of Suppliers	100	99.1
2 Rating of Suppliers	100	96.0
3 Requisitions and Quotations	100	92.8
4 Purchase Orders (POs)	99.0	96.4
5 Pricing	100	93.6
6 Vendor Contracts and Agreements	100	89.6
7 Management of POs	100	96.7
8 Procurement and Online Reporting	100	98.7
9 Repeat Procurement	100	95.5
10 Receipts for Procurement	100	95.1
11 Online Requirements	100	95.8
12 Reporting and Interfacing Requirements	100	98.4

Quality Management

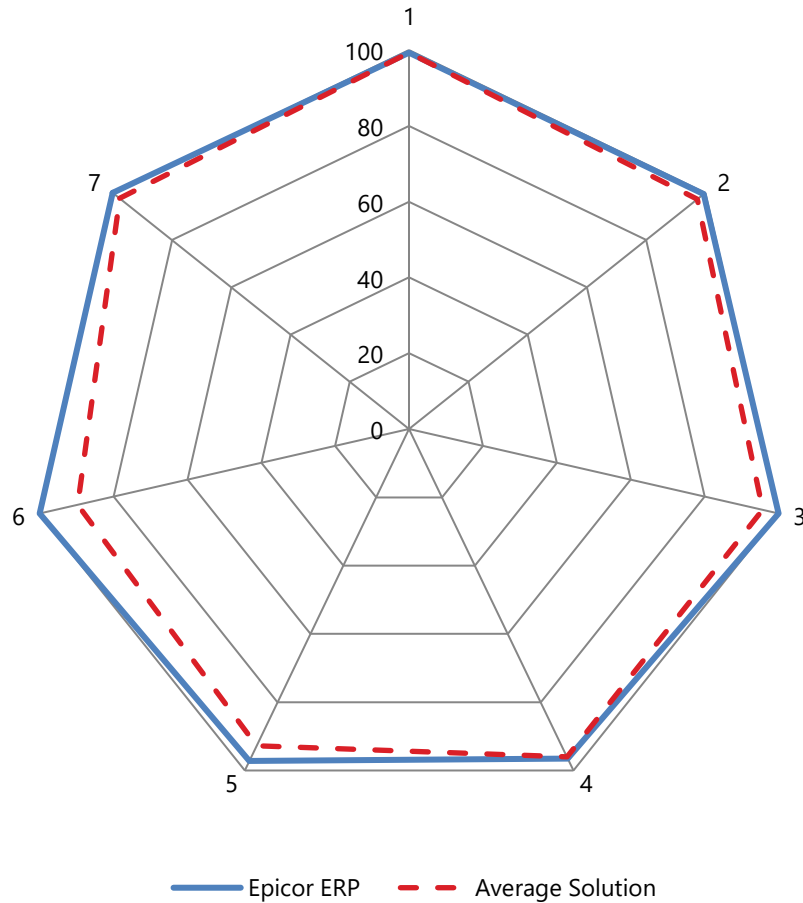
Quality Management refers to the set of actions taken by an organization to ensure that it creates and delivers high-quality products. Organizations must comply with national and international rules and regulations related to product quality, but they often also create and use internal requirements for quality control. Specific procedures need to be set up in order to ensure that the end products comply with internal or external quality standards. All these activities need to be well documented in order to provide the information needed when customers are not satisfied with the quality of the products received. Government agencies may also require this information for control and verification.



Criteria	Epicor ERP Score	Average Score
1 Production Quality Management	99.0	98.2
2 Non-Production Quality Management	100	88.1
3 Inventory Quality Management	100	92.5

Sales Management

Sales Management encompasses a group of applications that automates the data entry process of customer orders and keeps track of the status of orders. It involves order entry, order tracing and status reporting, pricing, invoicing, etc. It also provides basic functionality for lead tracking, customer information, quote processing, pricing and rebates, etc.

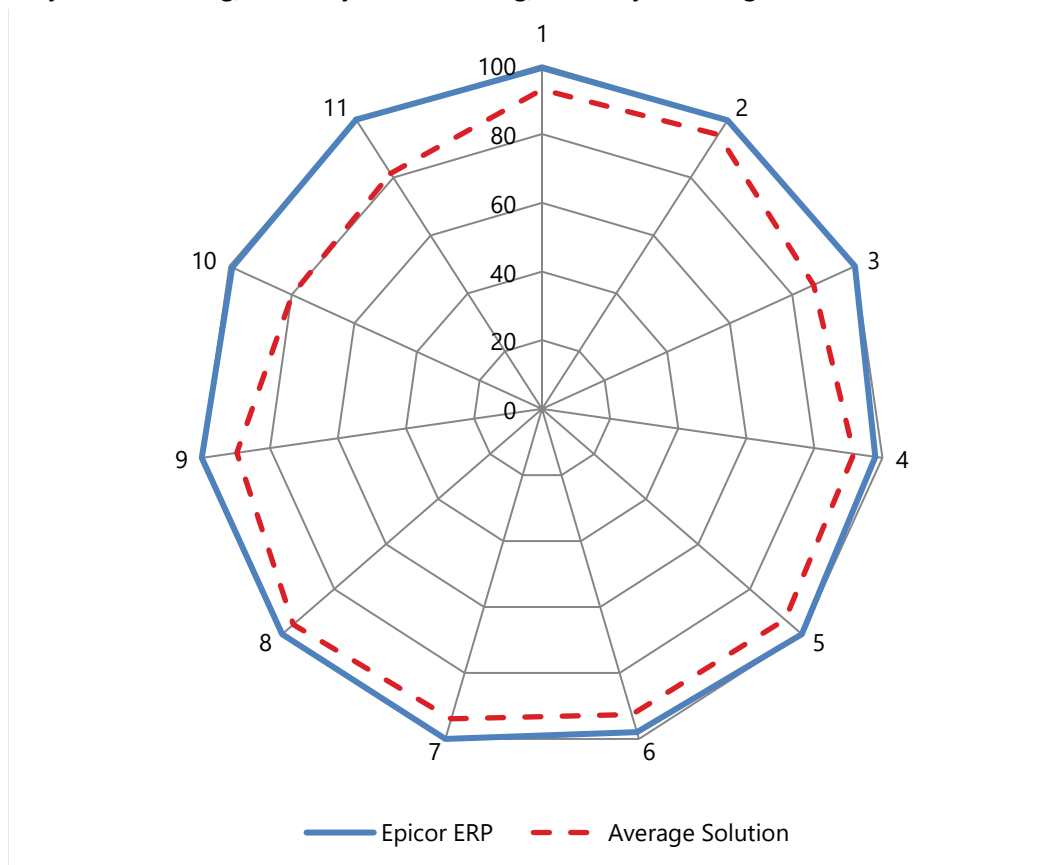


Criteria	Epicor ERP Score	Average Score
1 Online Requirements	99.3	99.3
2 Reporting and Interfacing Requirements	99.4	97.3
3 Available-to-Promise (ATP)	100	95.7
4 Pricing and Discounting	96.5	96.0
5 Customer Relationship Management (CRM)	97.2	92.8
6 Order Entry	100	89.7
7 Customer Service and Returned Goods Handling	100	97.7

Epicor ERP for Engineer-to-order Manufacturing

Financials

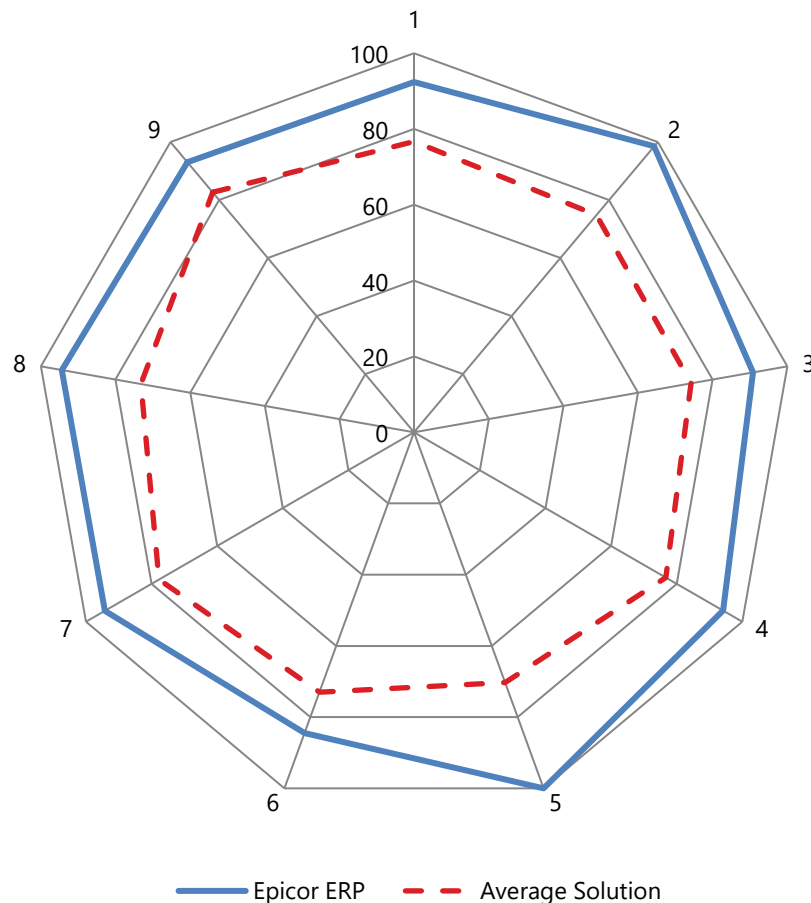
The Financials module provides features and functions that allow accountants and financial managers to ensure financial transactions are tracked and properly recorded, and that this information is available via reports and other data retrieval tools. Traditionally, this module includes the General Ledger, Accounts Payable, Fixed Assets, Cost accounting, Cash Management, Budgeting, Accounts Receivable, and Financial Reporting submodules. Because of the project-based nature of ETO manufacturing, this module also includes the Project Accounting, ETO Project Accounting, and Project Billing submodules.



Criteria	Epicor ERP Score	Average Score
1 General Ledger	99.2	92.9
2 Accounts Payable (A/P)	99.8	94.8
3 Fixed Assets	100	86.8
4 Cost Accounting	97.9	91.6
5 Cash Management	100	93.5
6 Budgeting	97.9	92.6
7 Accounts Receivable	100	93.9
8 Financial Reporting	100	95.7
9 Project Accounting	100	89.7
10 ETO Project Accounting	99.1	79.9
11 Project Billing	100	81.5

Human Resources

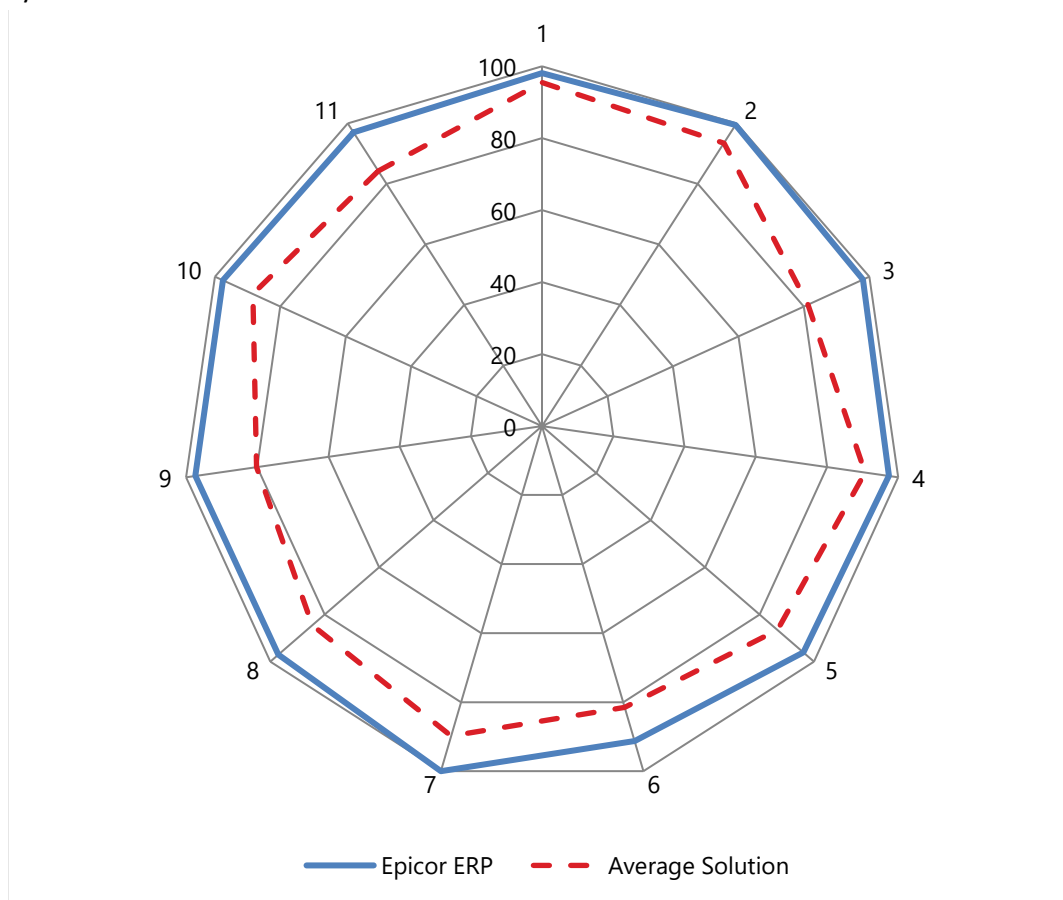
Human Resources (HR) management encompasses all the applications necessary for handling personnel-related tasks for corporate managers and individual employees. The module includes the Personnel Management, Benefits, Payroll, Employee Self-Service, Employee Metrics, Health and Safety, Automated Time and Attendance, Workforce Management, and Training submodules.



Criteria	Epicor ERP Score	Average Score
1 Personnel Management	92.4	76.7
2 Benefits	98.5	74.8
3 Payroll	90.8	74.2
4 Employee Self-Service	94.1	76.7
5 Employee Metrics	100	70.3
6 Health and Safety	84.5	73.0
7 Workforce Management	94.2	77.7
8 Training	94.4	73.2
9 Automated Time and Attendance	93.0	82.7

Manufacturing Management

Manufacturing Management covers the project-based aspect of ETO manufacturing and provides the ability to plan production according to projects at various scales, rolling high-level plans down into daily schedules of individual machines and workers, and tracing real-time situations in production shop floor and in planning to control ETO manufacturing. This ensures that manufacturing facilities follow production projects in an accurate and timely manner, and that manufacturing schedules and operations are altered as required. It involves product configuring, work center and machine dispatching, all aspects of work-in-progress management, along with comprehensive product costing functionality. It also provides a consolidated view of the production situation using extensive multi-level reporting capabilities, and integration with product development/lifecycle management systems.



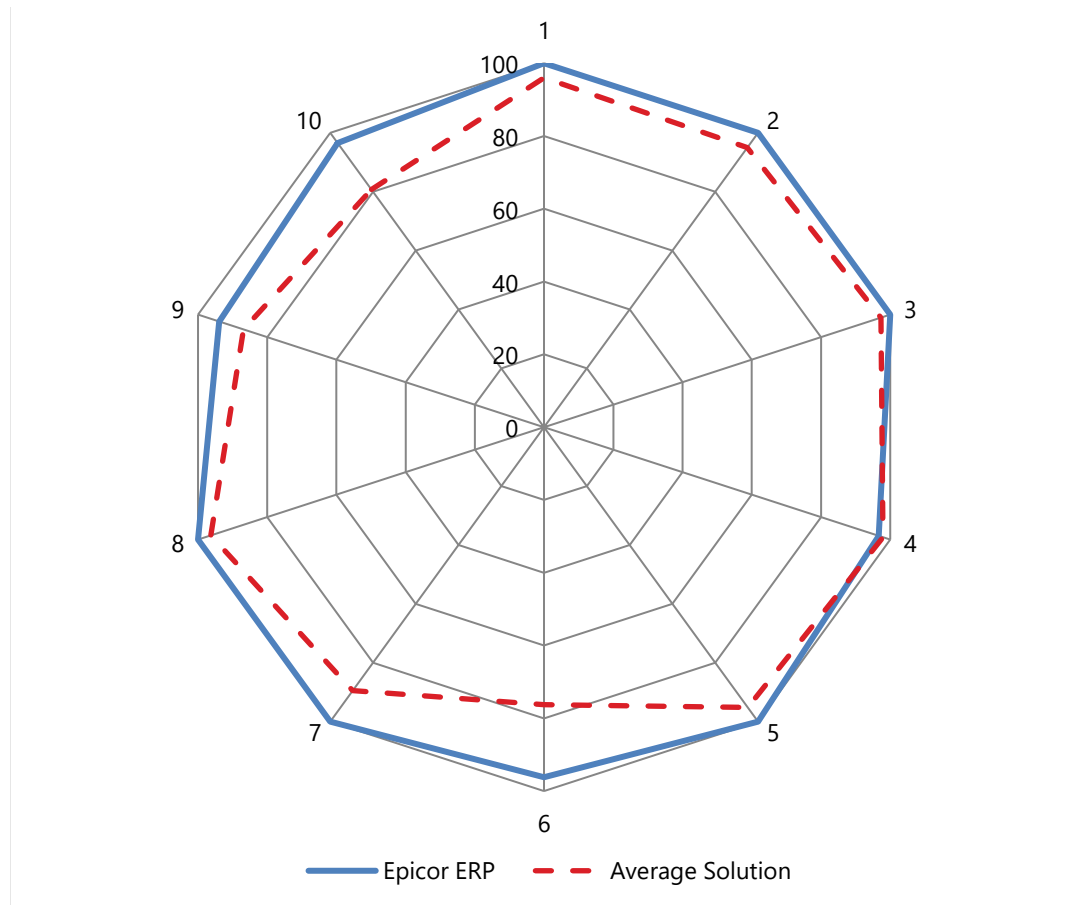
Criteria		Epicor ERP Score	Average Score
1	Product Costing	98.1	95.5
2	Shop Floor Control	99.5	93.5
3	Field Service and Repairs	98.1	81.2
4	Production Planning	97.4	90.7
5	Project Management	96.1	86.6
6	ETO Project Management	91.3	81.5
7	Product Data Management (PDM)	100	89.8
8	Product/Item Configurator	97	84.6

9	Item Master, Product Structure, PDM and PLM	97.4	80.2
10	ETO Manufacturing and Production	97.5	88.4
11	Shop Floor Data Collection (SFDC)	97	84.3

Inventory Management

Inventory Management functionality addresses the record-keeping of warehoused goods, and managing the movement of these goods to, from, and through warehouses.

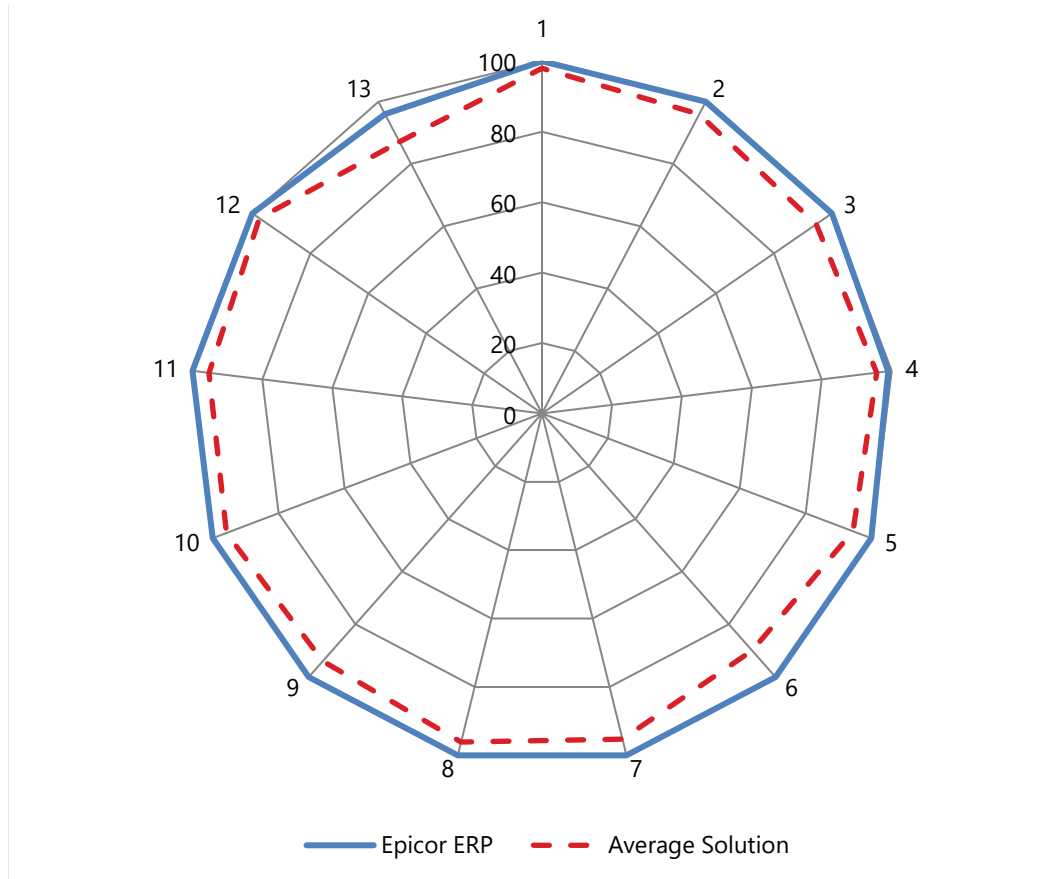
Forecasting, finished goods reservation and allocation processes, ETO-specific criteria, and inventory adjustments are also part of this functional module.



Criteria	Epicor ERP Score	Average Score
1 Inventory Management—Online Requirements	100	96.0
2 Processing Requirements	100	95.0
3 Data Requirements	100	97.3
4 Reporting and Interfacing Requirements (Inventory Management)	96.7	97.9
5 Locations and Lot Control	100	95.2
6 Forecasting	96.2	76.3
7 Reservations and Allocations	100	89.5
8 Adjusting Inventory	100	96.3
9 ETO Inventory	93.9	86.9
10 Customer-Furnished Items	96.5	80.7

Purchasing Management

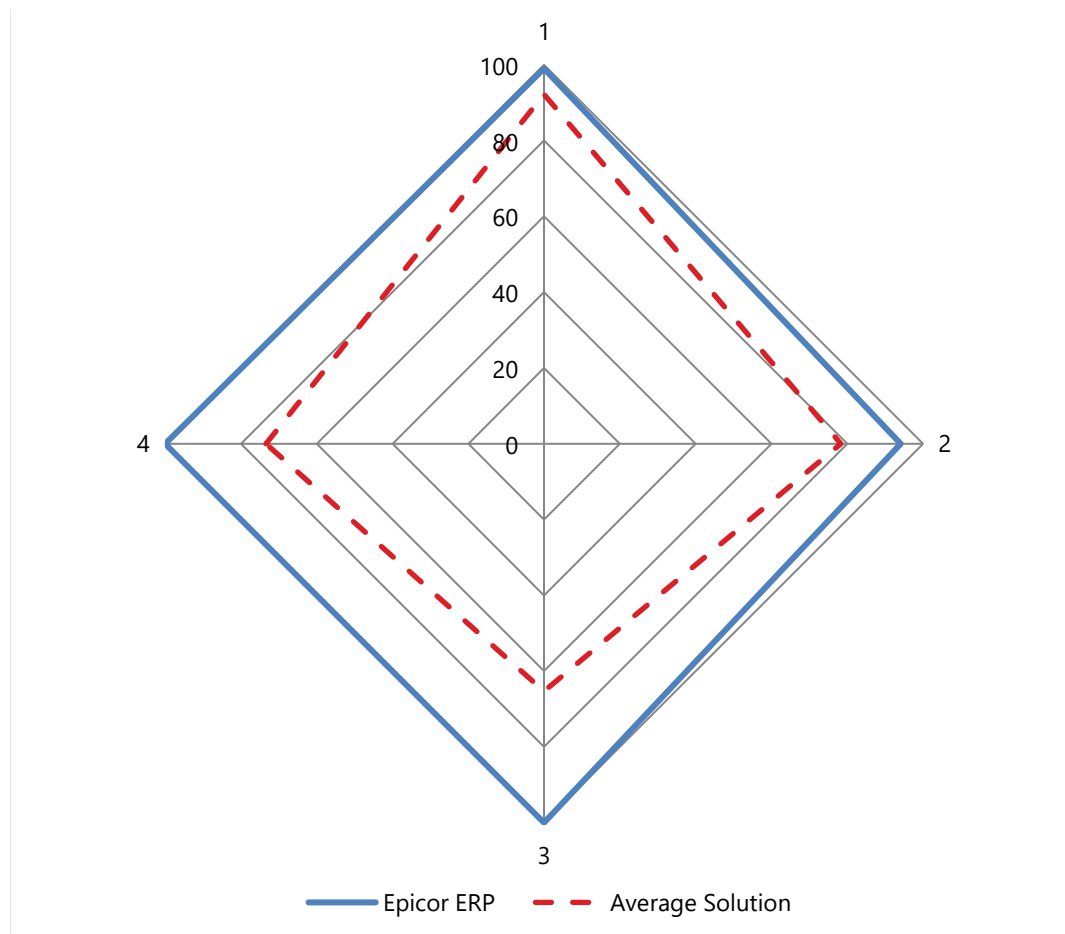
Purchasing Management encompasses a group of applications that manages inventory stocks and controls the purchasing of raw materials needed to build products. It also involves creating purchase orders/contracts, supplier tracking, goods receipt and payment, regulatory compliance analysis and reporting, as well as ETO-related purchasing specifics.



Criteria		Epicor ERP Score	Average Score
1	Profile of Suppliers	100	98.0
2	Rating of Suppliers	100	95.9
3	Requisitions and Quotations	100	94.6
4	Purchase Orders (POs)	99.0	95.7
5	Pricing	100	94.4
6	Vendor Contracts and Agreements	100	90
7	Management of POs	100	95.3
8	Procurement Reporting and Online Reporting	100	96.1
9	Repeat Procurement	100	93.9
10	Receipts for Procurement	100	95.9
11	Online Requirements for Purchasing Management	100	95.3
12	Reporting and Interfacing Requirements for Purchasing Management	100	97.5
13	ETO Purchasing Management	96.0	87.1

Quality Management

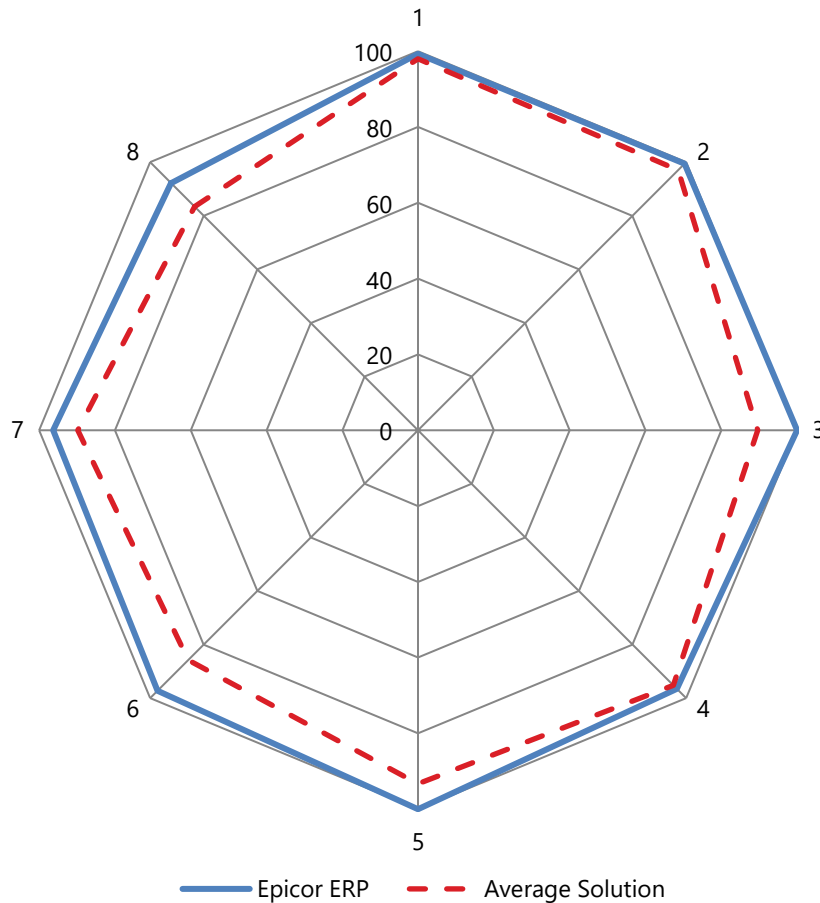
Quality Management refers to the set of actions taken by an organization to ensure that it creates and delivers high-quality products. Organizations must comply with national and international rules and regulations related to product quality, but they often also create and use internal requirements for quality control. Specific procedures need to be set up in order to ensure that the end products comply with internal or external quality standards. All these activities need to be well documented in order to provide the information needed when customers are not satisfied with the quality of the products received. Government agencies may also require this information for control and verification.



Criteria	Epicor ERP Score	Average Score
1 Production Quality Management	99.0	92.2
2 Workflow Management	94.1	78.3
3 Non-Production Quality Management	100	65.3
4 Inventory Quality Management	100	73.4

Sales Management

Sales Management encompasses a group of applications that automates the data entry process of customer orders and keeps track of the status of orders. It involves order entry, order tracing and status reporting, pricing, invoicing, etc. It also provides basic functionality for lead tracking, customer information, quote processing, pricing and rebates, etc.

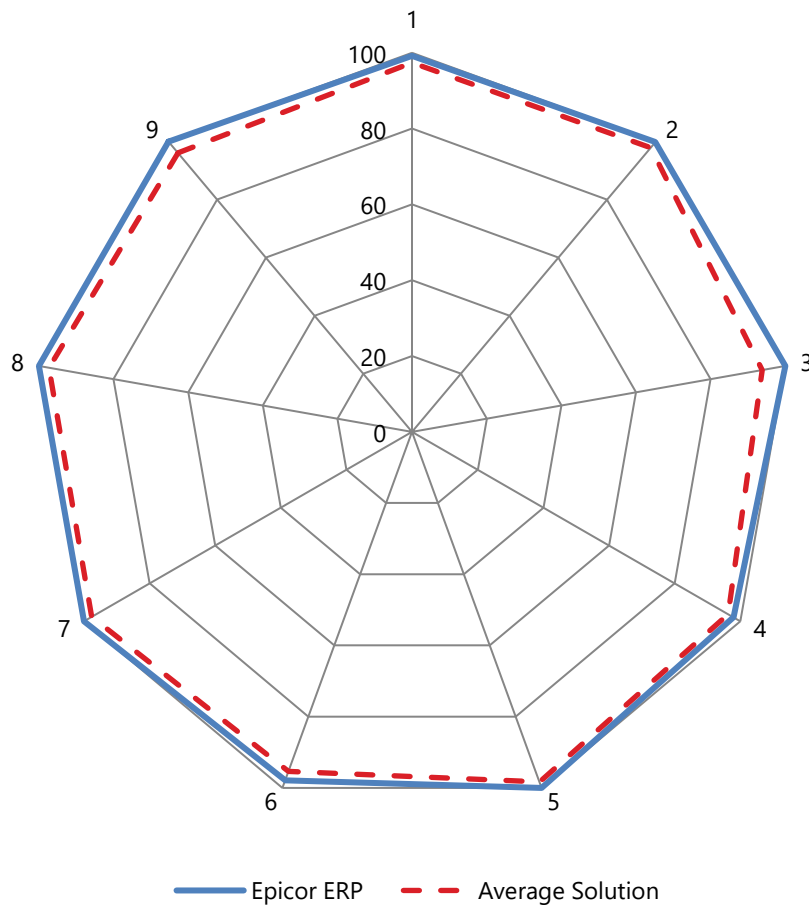


Criteria	Epicor ERP Score	Average Score
1 Online Requirements (Sales Management)	99.3	98.0
2 Reporting and Interfacing Requirements (Sales Management)	99.4	97.0
3 Available-to-Promise (ATP)	100	89.6
4 Pricing and Discounting	96.5	95.2
5 Customer Service and Returned Goods Handling	100	93.3
6 Customer Relationship Management (CRM)	97.2	85.8
7 Customer Support	96.3	89.8
8 Sales Management and Quotation	92.2	83.4

Epicor ERP for Mixed-mode Manufacturing

Financials

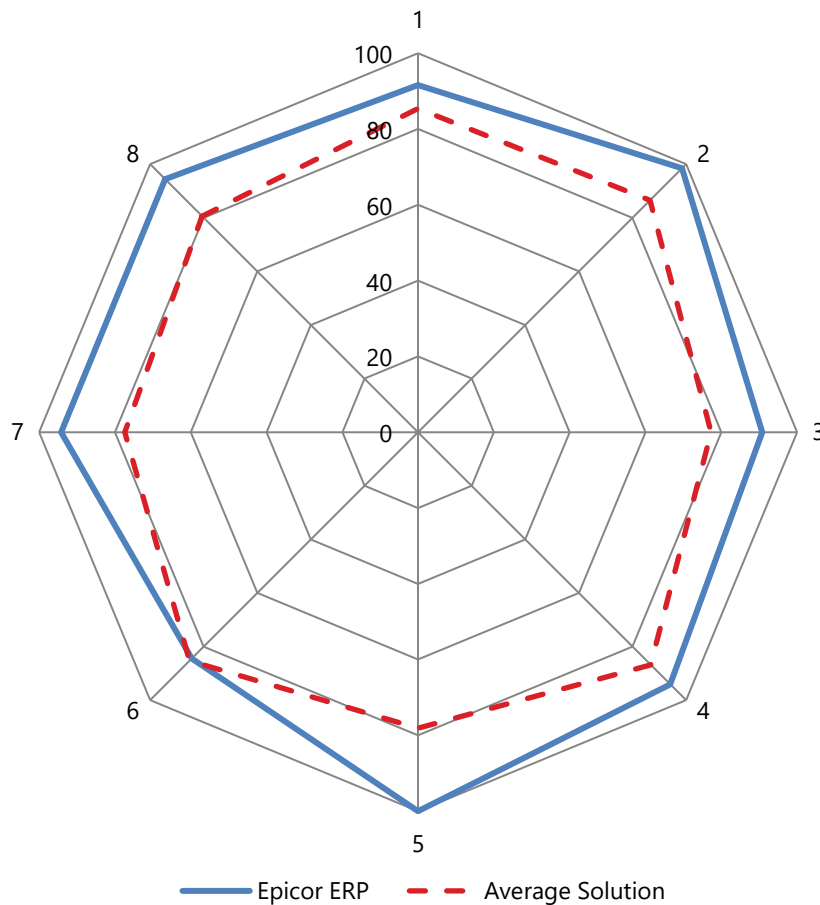
The Financials module provides features and functions that allow accountants and financial managers to ensure financial transactions are tracked and properly recorded, and that this information is available via reports and other data retrieval tools. Traditionally, this module includes the General Ledger, Accounts Payable, Fixed Assets, Cost Accounting, Cash Management, Accounts Receivable, and Financial Reporting submodules.



Criteria	Epicor ERP Score	Average Score
1 General Ledger	99.2	97.4
2 Accounts Payable (A/P)	99.8	97.9
3 Fixed Assets	100	93.8
4 Cost Accounting	97.9	96.3
5 Cash Management	100	98.3
6 Budgeting	97.9	95.4
7 Accounts Receivable	100	97.6
8 Financial Reporting	100	97.3
9 Project Accounting	100	96.1

Human Resources

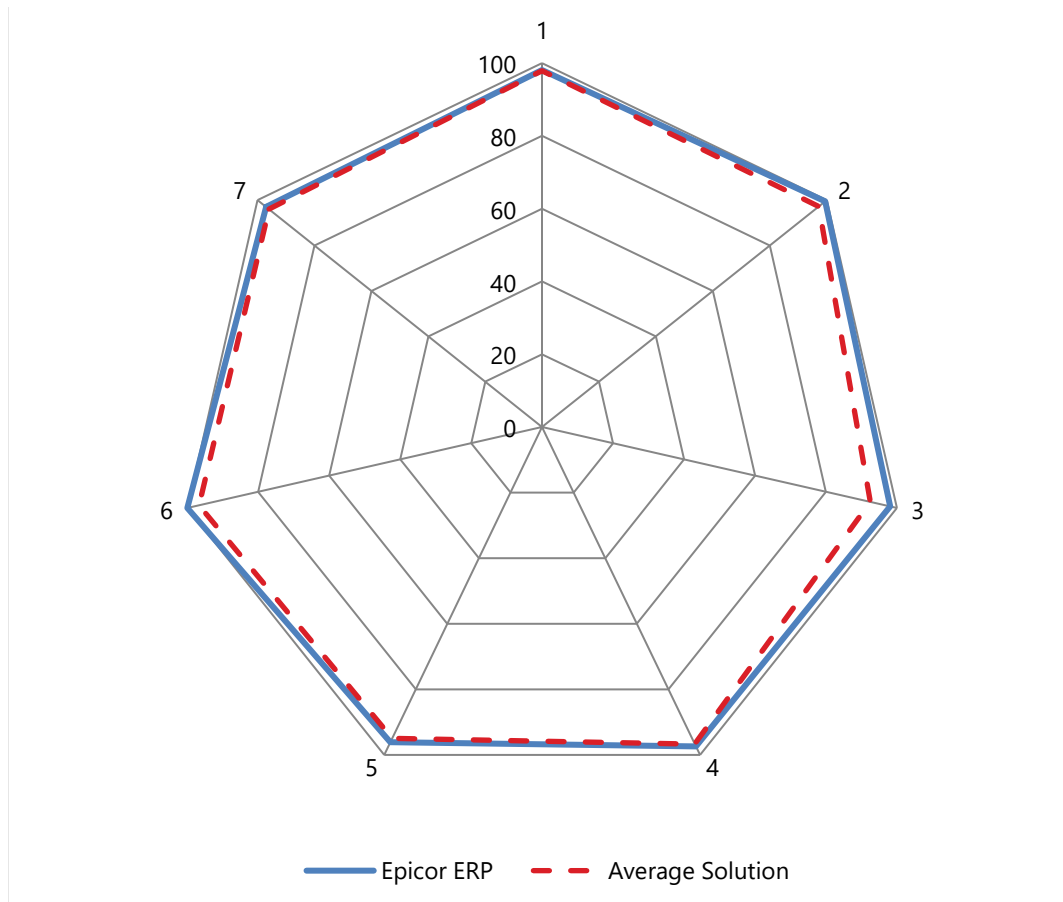
Human Resources management encompasses all the applications necessary for handling personnel-related tasks for corporate managers and individual employees. Submodules include Personnel Management, Benefits, Payroll, Employee Self-Service, Employee Metrics, Health and Safety, Workforce Management, and Training.



Criteria	Epicor ERP Score	Average Score
1 Personnel Management	91.6	85.4
2 Benefits	98.5	86.5
3 Payroll	90.8	77.3
4 Employee Self-Service	94.1	86.8
5 Employee Metrics	100	78.1
6 Health and Safety	84.5	85.3
7 Workforce Management	94.2	77.4
8 Training	94.4	80.6

Discrete Manufacturing Management

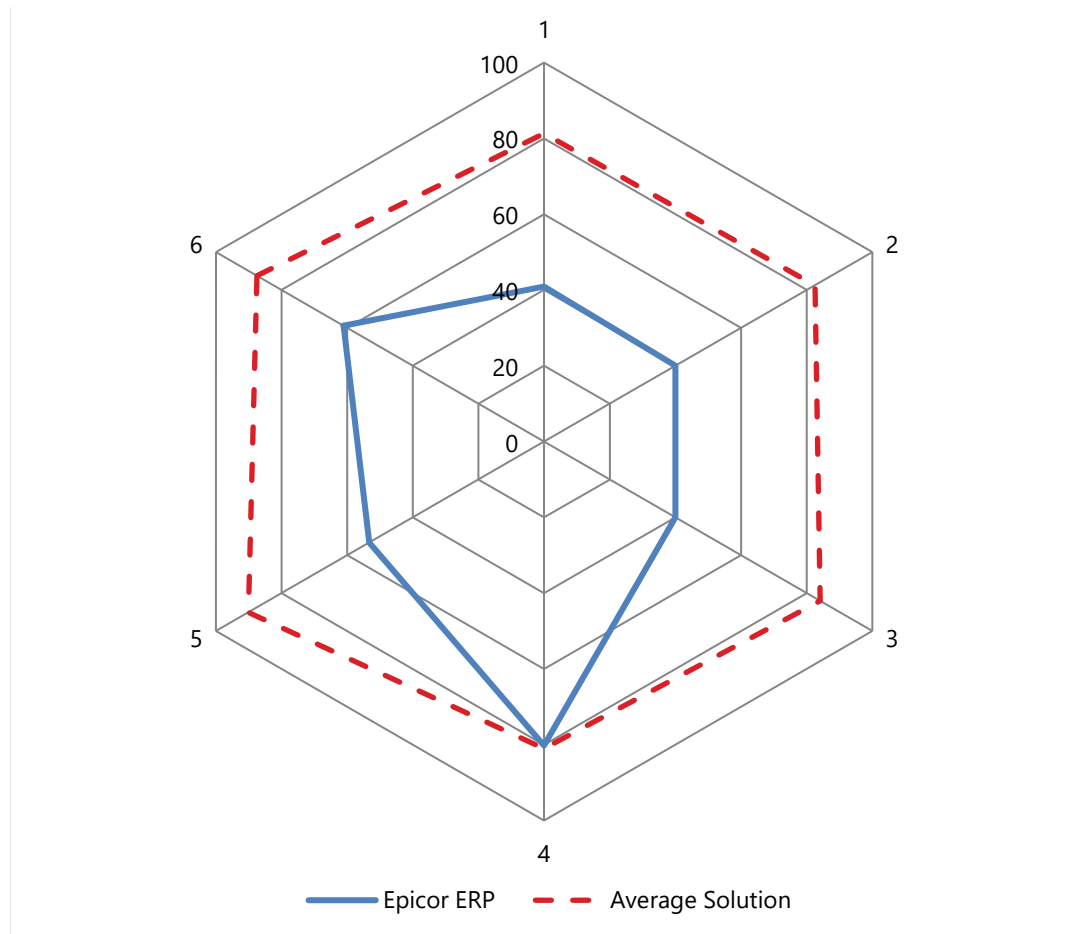
The Discrete Manufacturing Management module covers discrete manufacturing and provides the ability to plan production at various scales, rolling high-level plans down into daily schedules of individual machines and workers, and tracing real-time situations on the production shop floor and in planning to control manufacturing. This ensures that manufacturing facilities follow production plans in an accurate and timely manner, and that manufacturing schedules and operations are altered as required. It involves product configuring, work centers and machines dispatching, all aspects of work-in-progress management, and comprehensive product costing functionality. It also provides a consolidated view of the production situation using extensive multi-level reporting capabilities.



Criteria	Epicor ERP Score	Average Score
1 Product Costing	98.1	97.9
2 Shop Floor Control	99.5	97.2
3 Field Service and Repairs	98.1	92.5
4 Production Planning	97.4	96.7
5 Project Management	96.1	94.9
6 Product Data Management (PDM)	100	96.7
7 Product/Item Configurator	97.0	96.0

Process Manufacturing Management

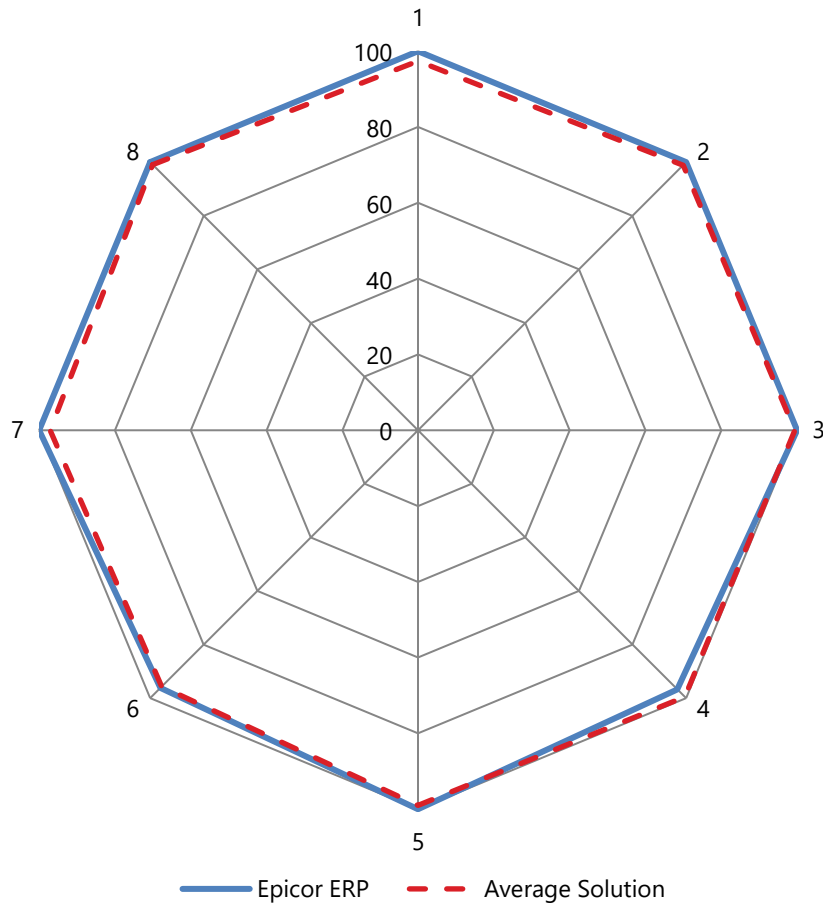
Process Manufacturing Management covers specifics that are applicable to process type of manufacturing. Formulas and recipes, modeling of process using formulas and routings, process batch control and reporting, process manufacturing costing, and process manufacturing–related material management are the major functional areas of this module. It also provides a consolidated view of the production situation using extensive multi-level reporting capabilities.



Criteria	Epicor ERP Score	Average Score
1 Formulas/Recipes	40.9	81.3
2 Process Model (Formulas + Routings)	40.0	82.5
3 Process Batch Control and Reporting	40.0	84.1
4 Conformance Reporting	80.2	81.0
5 Process Manufacturing Costing	53.3	90.1
6 Material Management	61.1	87.5

Inventory Management

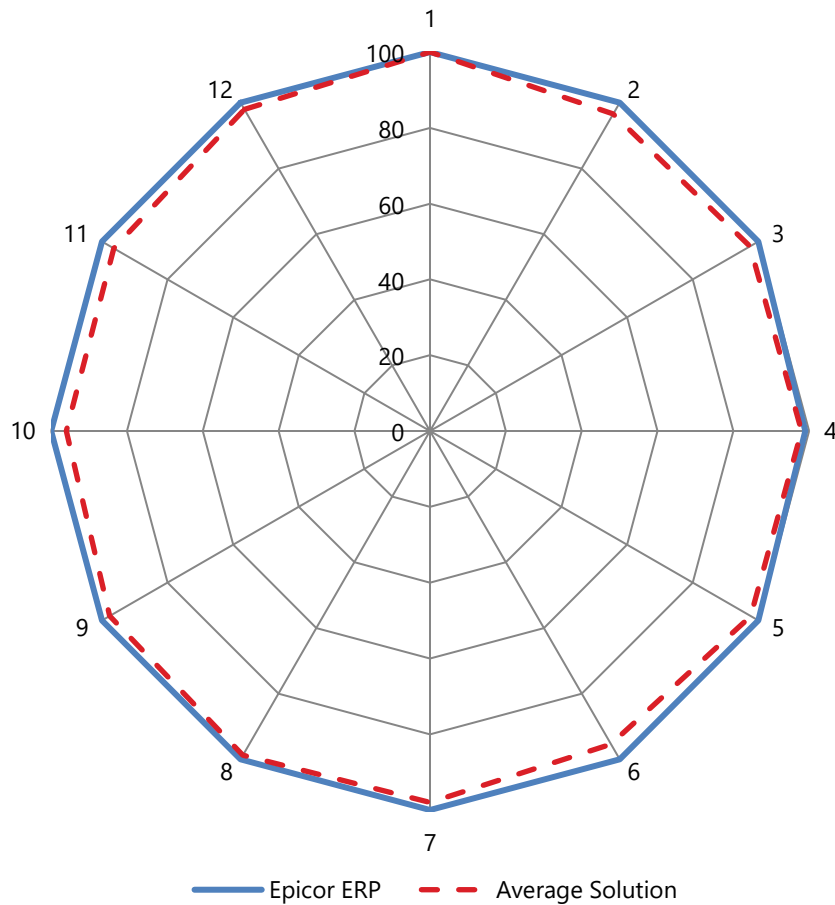
Inventory Management functionality addresses the record-keeping of warehoused goods, and managing the movement of these goods to, from, and through warehouses. Forecasting, finished goods reservation and allocation processes, and inventory adjustments are also a part of this functional module.



Criteria	Epicor ERP Score	Average Score
1 Inventory Management—Online Requirements	100	97.4
2 Processing Requirements	100	98.9
3 Data Requirements	100	99.4
4 Reporting and Interfacing Requirements (Inventory Management)	96.7	99.5
5 Locations and Lot Control	100	99.0
6 Forecasting	96.2	95.7
7 Reservations and Allocations	100	97.1
8 Adjusting Inventory	100	99.1

Purchasing Management

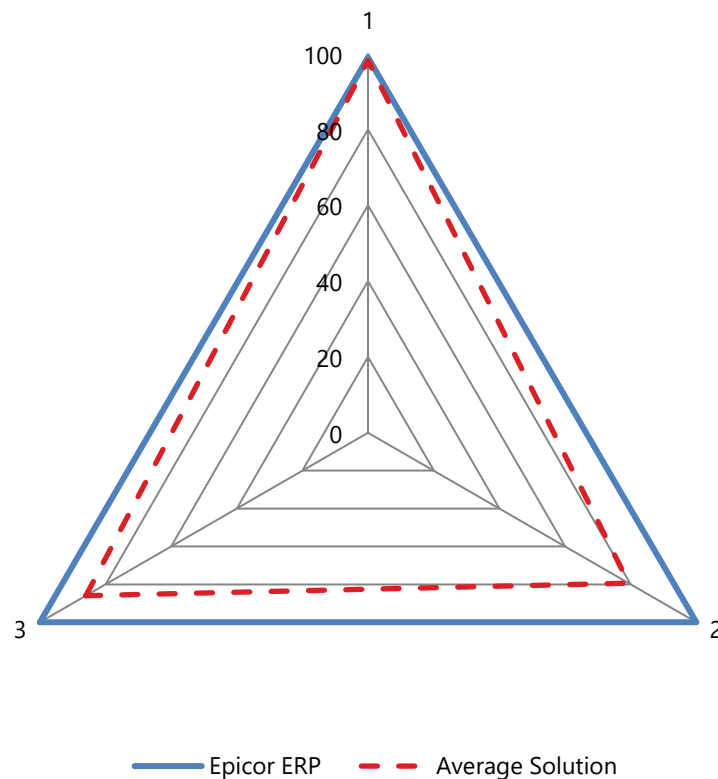
Purchasing Management encompasses a group of applications that controls the purchasing of raw materials and manages inventory stocks. It also involves creating purchase orders/contracts, supplier tracking, goods receipt and payment, and associated regulatory compliance analysis and reporting.



Criteria	Epicor ERP Score	Average Score
1 Profile of Suppliers	100	100
2 Rating of Suppliers	100	96.6
3 Requisitions and Quotations	100	97.5
4 Purchase Orders (POs)	99.0	98.0
5 Pricing	100	97.7
6 Vendor Contracts and Agreements	100	95.4
7 Management of POs	100	98.0
8 Procurement Reporting and Online Reporting	100	98.8
9 Repeat Procurement	100	97.6
10 Receipts for Procurement	100	96.0
11 Online Requirements for Purchasing Management	100	96.4
12 Reporting and Interfacing Requirements	100	98.0

Quality Management

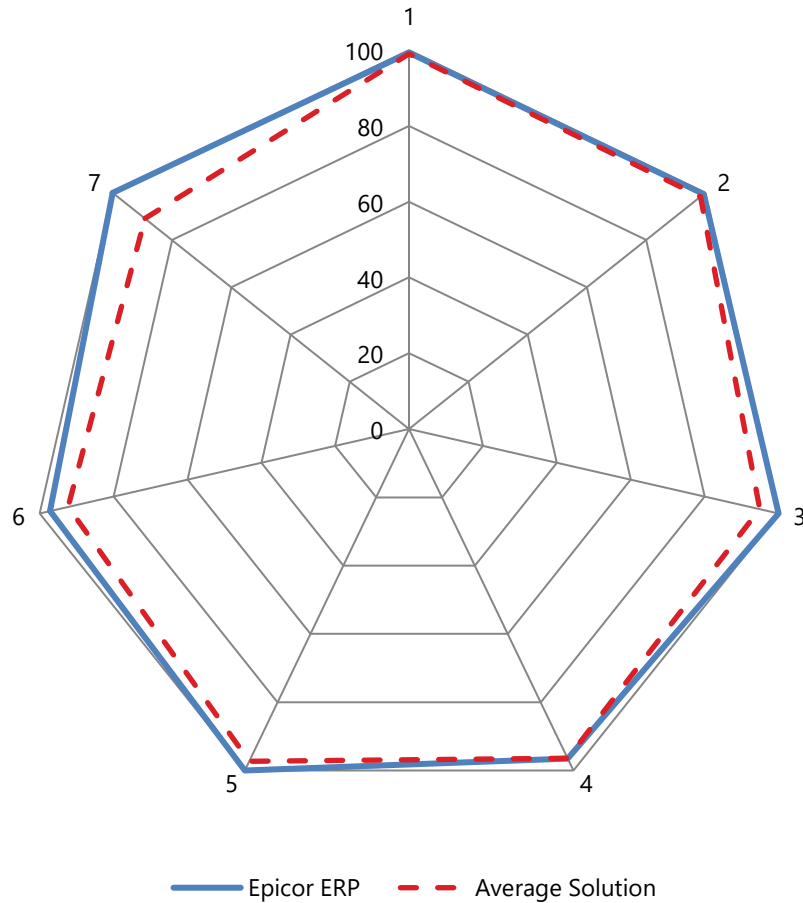
Quality Management refers to the set of actions taken by an organization to ensure that it creates and delivers high-quality products. Organizations must comply with national and international rules and regulations related to product quality, but they often also create and use internal requirements for quality control. Specific procedures need to be set up in order to ensure that the end products comply with internal or external quality standards. All these activities need to be well documented in order to provide the information needed when customers are not satisfied with the quality of the products received. Government agencies may also require this information for control and verification.



Criteria	Epicor ERP Score	Average Score
1 Production Quality Management	99.0	98.2
2 Non-Production Quality Management	100	79.4
3 Inventory Quality Management	100	86.0

Sales Management

Sales Management encompasses a group of applications that automates the data entry process of customer orders and keeps track of the status of orders. It involves order entry, order tracing and status reporting, pricing, invoicing, etc. It also provides basic functionality for lead tracking, customer information, quote processing, pricing and rebates, etc.

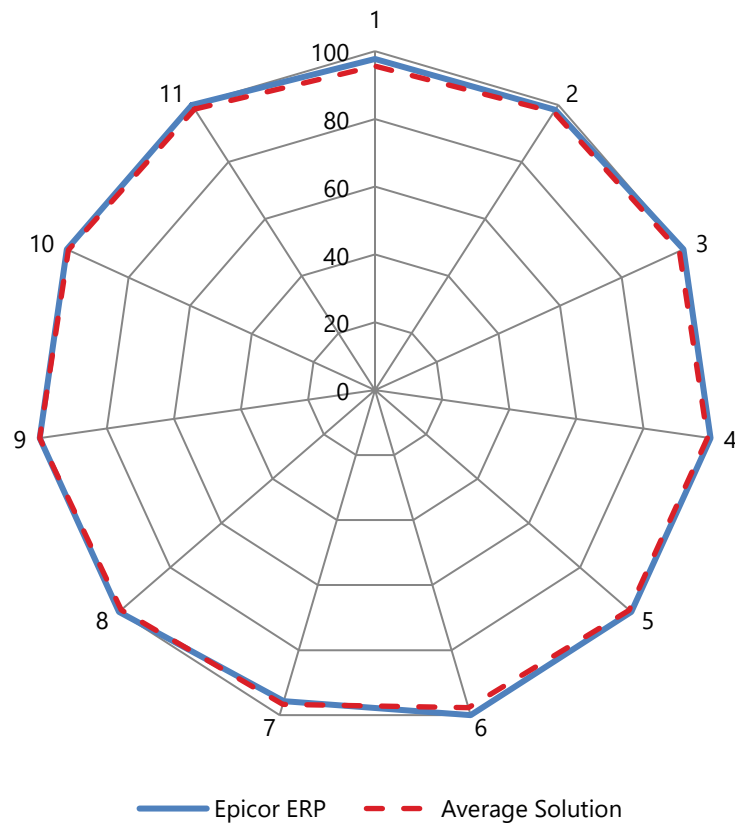


Criteria	Epicor ERP Score	Average Score
1 Online Requirements (Sales Management)	99.3	99.0
2 Reporting and Interfacing Requirements	99.4	98.3
3 Available-to-Promise (ATP)	100	94.9
4 Pricing and Discounting	96.5	96.4
5 Customer Service and Returned Goods Handling	100	97.3
6 Customer Relationship Management (CRM)	97.2	92.3
7 Order Entry	100	89.1

Epicor ERP for Financial Packages

General Ledger

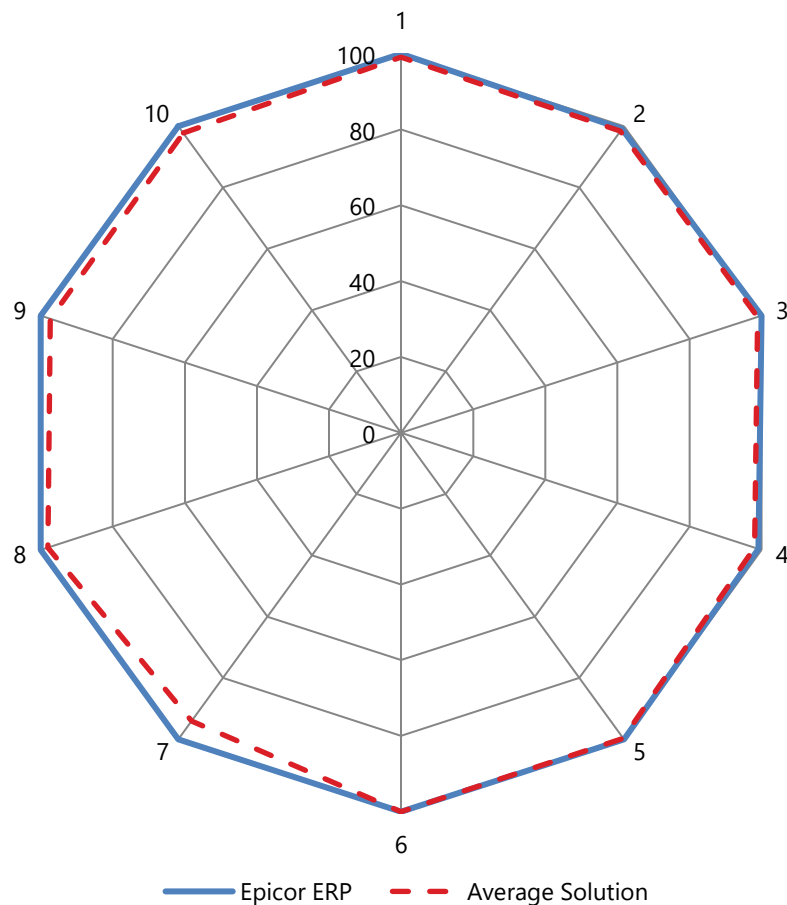
General Ledger functionality in financial and accounting software allows companies to keep centralized charts of accounts and corporate financial balances. The general ledger supports all aspects of the business accounting process. In this functional area, financial accounting transactions are posted, processed, summarized, and reported. The general ledger maintains a complete audit trail of transactions and enables individual business units to view their financial information, while parent companies can roll up all business subsidiaries and view the consolidated information.



Criteria	Epicor ERP Score	Average Score
1 Parameters and Structuring	97.7	95.6
2 Chart of Accounts Structure	98.3	97.5
3 Ledger Development and Management	100	98.7
4 Enterprise Reporting Structure	100	99.1
5 Journal Entry and Reporting	100	99.2
6 Journal Vouchers	100	97.7
7 Controls for Ledgers	95.7	96.7
8 Multicurrency Capabilities	100	99.1
9 Online Inquiry Reporting	100	100
10 Report Writing Capabilities	100	99.5
11 Variable Analysis	100	98.5

Accounts Payable (A/P)

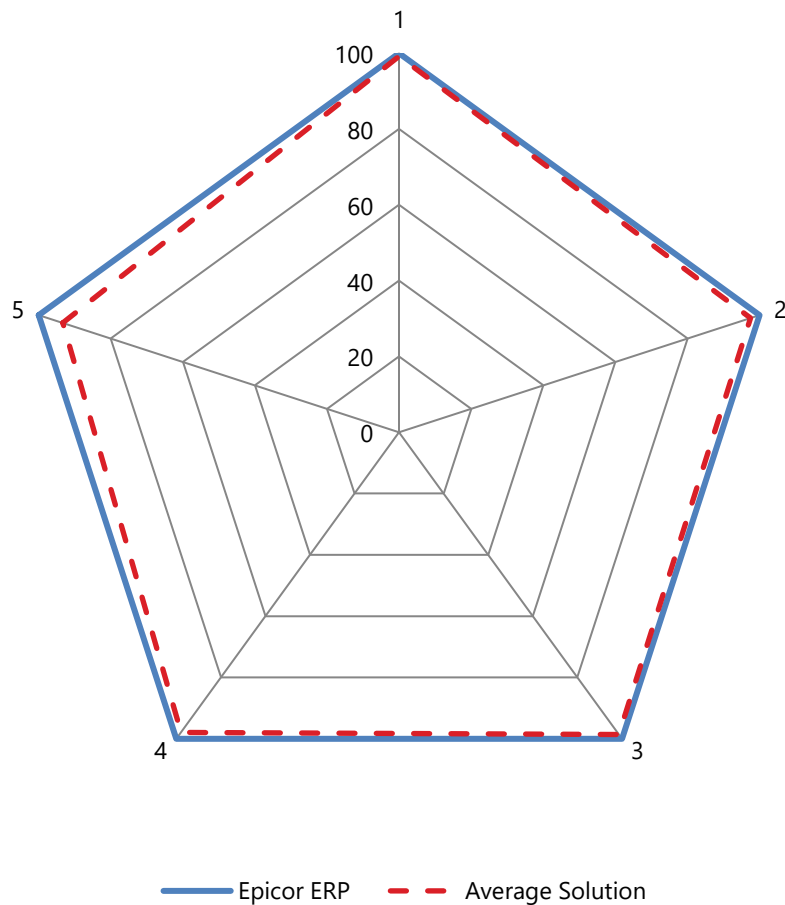
The Accounts Payable (A/P) module allows users to schedule bill payments to suppliers and distributors and to keep accurate information about owed money, due dates, and available discounts. It also provides functionality and integration to other areas, such as customer service, purchasing, inventory, and manufacturing control. Typically the software supports the functionality of A/P company policies and procedures, suppliers/voucher master data, control on payments and payment processing, invoicing and aging analysis, journal voucher processing, A/P ledger posting, A/P transactions and controls, and reporting.



Criteria	Epicor ERP Score	Average Score
1 Policies and Procedures	100	99.1
2 Supplier Master Data	99.1	98.4
3 Invoice Process and Aging	100	98.9
4 Journal Invoice Process	99.1	98.1
5 A/P Ledger Posting	100	99.7
6 Control of Payments	100	100
7 A/P Transactions and Controls	100	94.0
8 Processing of Payments	100	98.0
9 Processing of Checks	100	97.3
10 Reporting	100	97.8

Fixed Assets

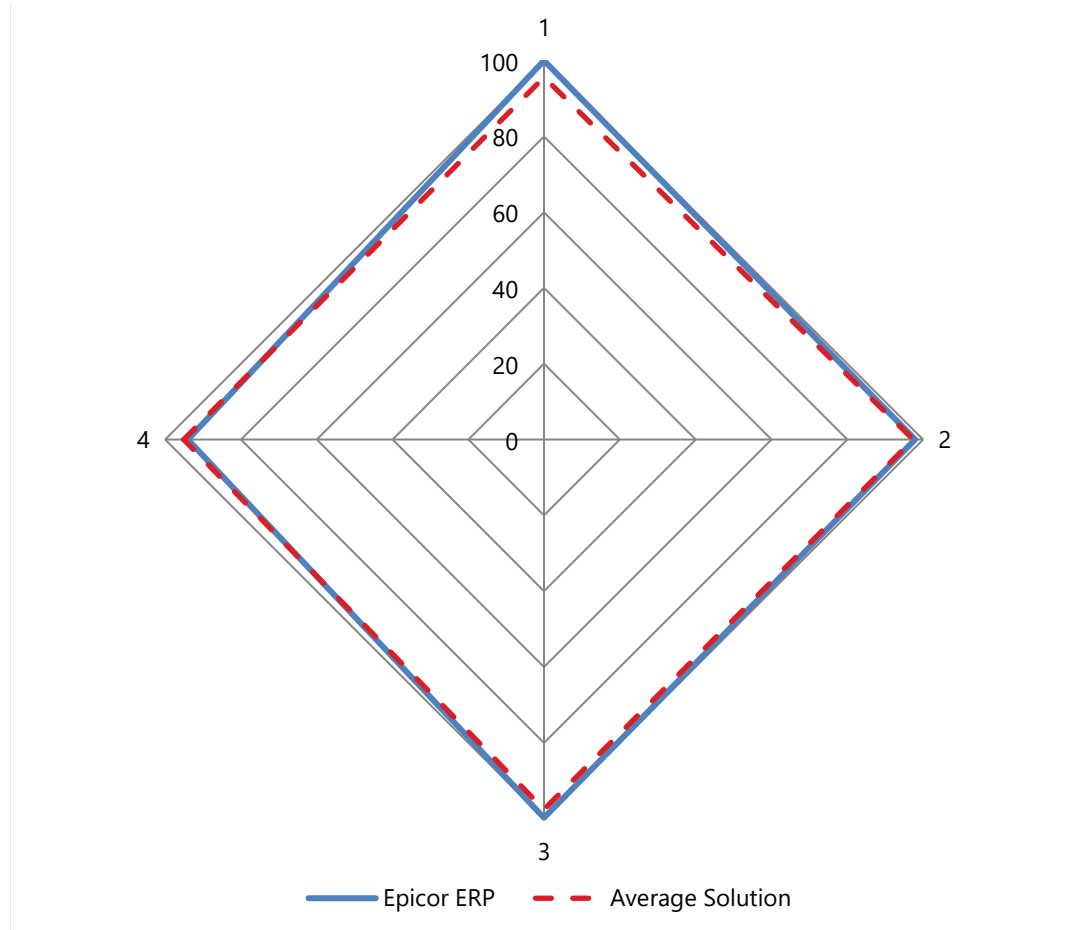
Fixed Assets software functionality allows the management of depreciation and other costs associated with tangible assets, such as buildings, property, and equipment. Financial management software typically supports the following functionality for fixed assets: fixed assets records, asset transactions, asset depreciation and depreciation books, revaluation and interest calculation, and tax reporting.



Criteria	Epicor ERP Score	Average Score
1 Records for Fixed Assets	100	99.2
2 Asset Transactions	100	97.5
3 Depreciation of Assets	100	98.6
4 Depreciation Books	100	97.9
5 Tax Reports	100	93.3

Cost Accounting

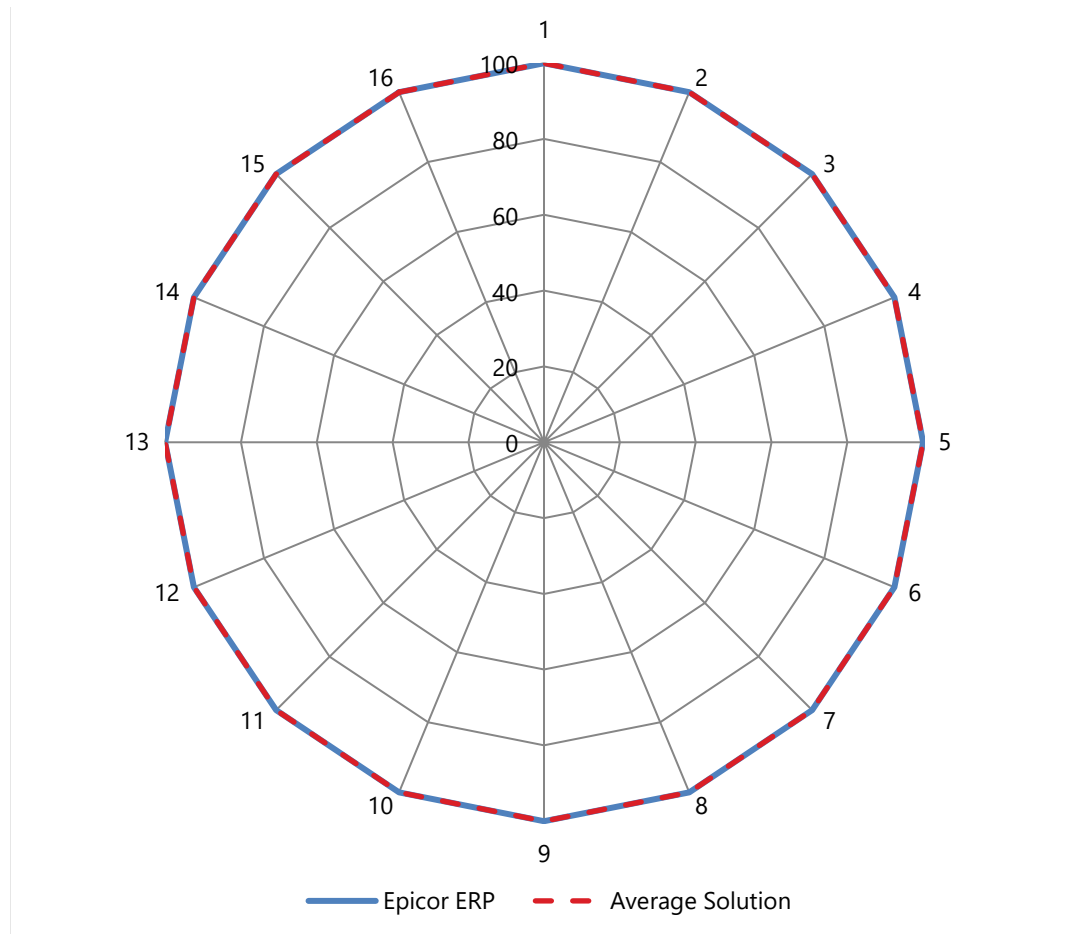
Cost Accounting capability allows the analysis of corporate costs of manufactured or sold products related to overhead, materials, and manufacturing or other types of applied processes. It provides a variety of costing approaches such as standard, first-in first-out (FIFO), last-in first-out (LIFO), average, target, and activity-based costing (ABC). The software should support the following functionalities: cost data, cost allocation definitions, cost allocation process, cost management, cost and sales price calculation, and activity-based cost tracing and tracking.



Criteria	Epicor ERP Score	Average Score
1 Cost Data	100	95.6
2 Cost Allocations	97.9	97.4
3 Cost Allocation Processing	99.8	97.6
4 Management of Costs	94.0	95.1

Cash Management

Cash Management involves the capability of the software system to record cash charges, deposits, payments, and receipts; report cash projections; calculate expected cash uses/sources; report current cash availability; etc. It also allows the monitoring and analysis of cash holdings, financial deals, and investment risks.

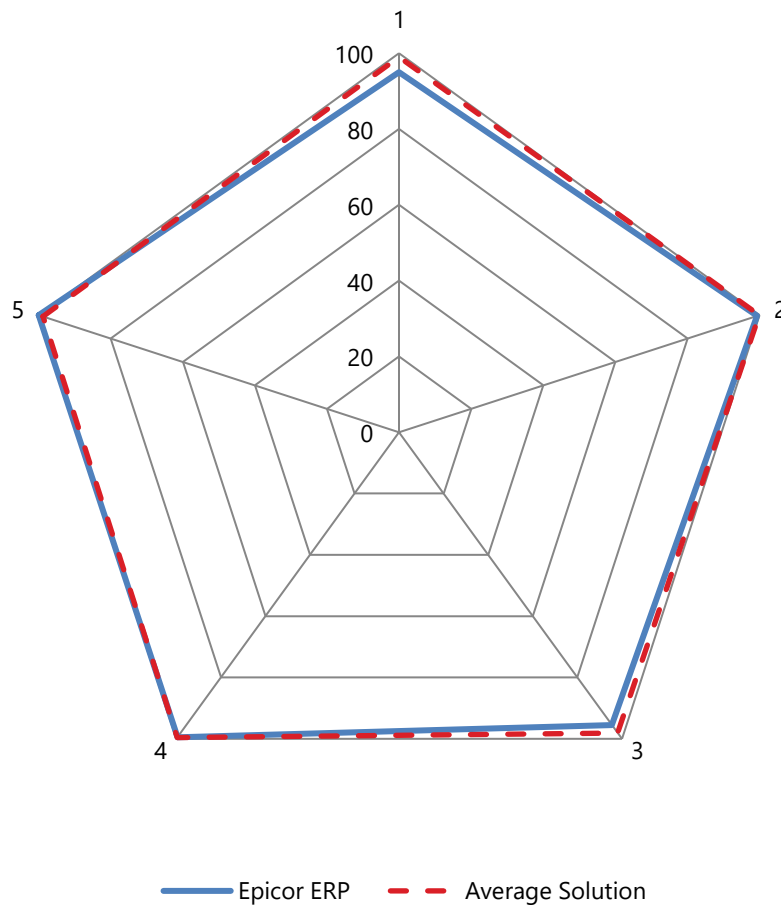


Criteria		Epicor ERP Score	Average Score
1	Up-to-date cash balance report	100	100
2	Projects cash resources from sales, A/R, field services, and miscellaneous cash	100	100
3	Projects cash utilization from purchasing, A/P, and miscellaneous cash	100	100
4	Checks committed funds against cash reserves or availability	100	100
5	Updates and maintains pay date schedule	100	100
6	Reports cash projections	100	100
7	Entity, bank, expected date, terms, and customer payment history are used to create cash projections	100	100
8	Cash projects by currency	100	100
9	Views of inflows and outflows from cash book by bank, year, or statement	100	100

10	Records cash payments and receipts via electronic banking functions	100	100
11	Notifies and reports on statement discrepancies	100	100
12	"Miscellaneous" category for charges and deposits	100	100
13	Processes cancelled A/P checks	100	100
14	Records journal entries to the G/L cash accounts	100	100
15	Prints account statements	100	100
16	Automatically records bank cash receipts	100	100

Budgeting

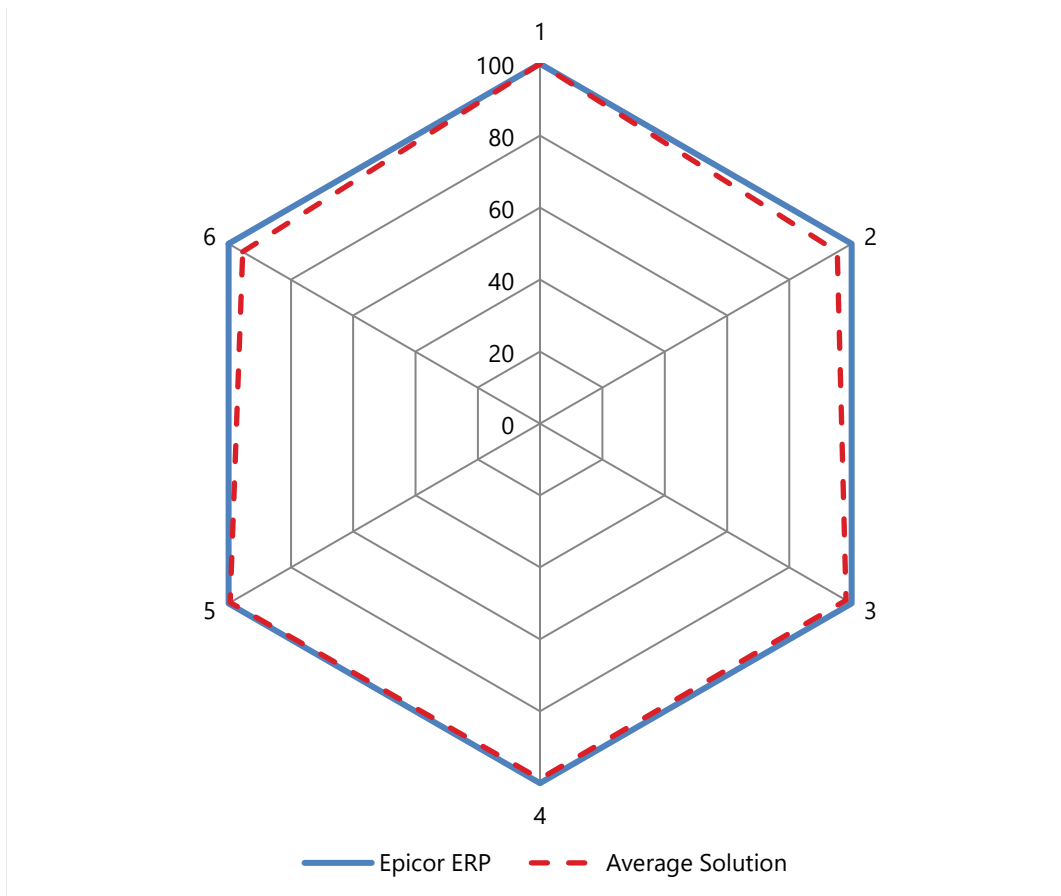
The Budgeting module represents software support of processes of budgetary control, budget accounting, budget development, and budget allocation. Financial management software should provide tools to enable detailed budget development and analysis. Additional functionality should allow integration with project management software applications, either natively or via external interfaces.



Criteria	Epicor ERP Score	Average Score
1 Budget Control	95.0	99.0
2 Budget Accounting	99.3	99.9
3 Budget Development	95.5	98.1
4 Budgets	99.5	99.6
5 Allocation of Budgets	100	98.8

Accounts Receivable (A/R)

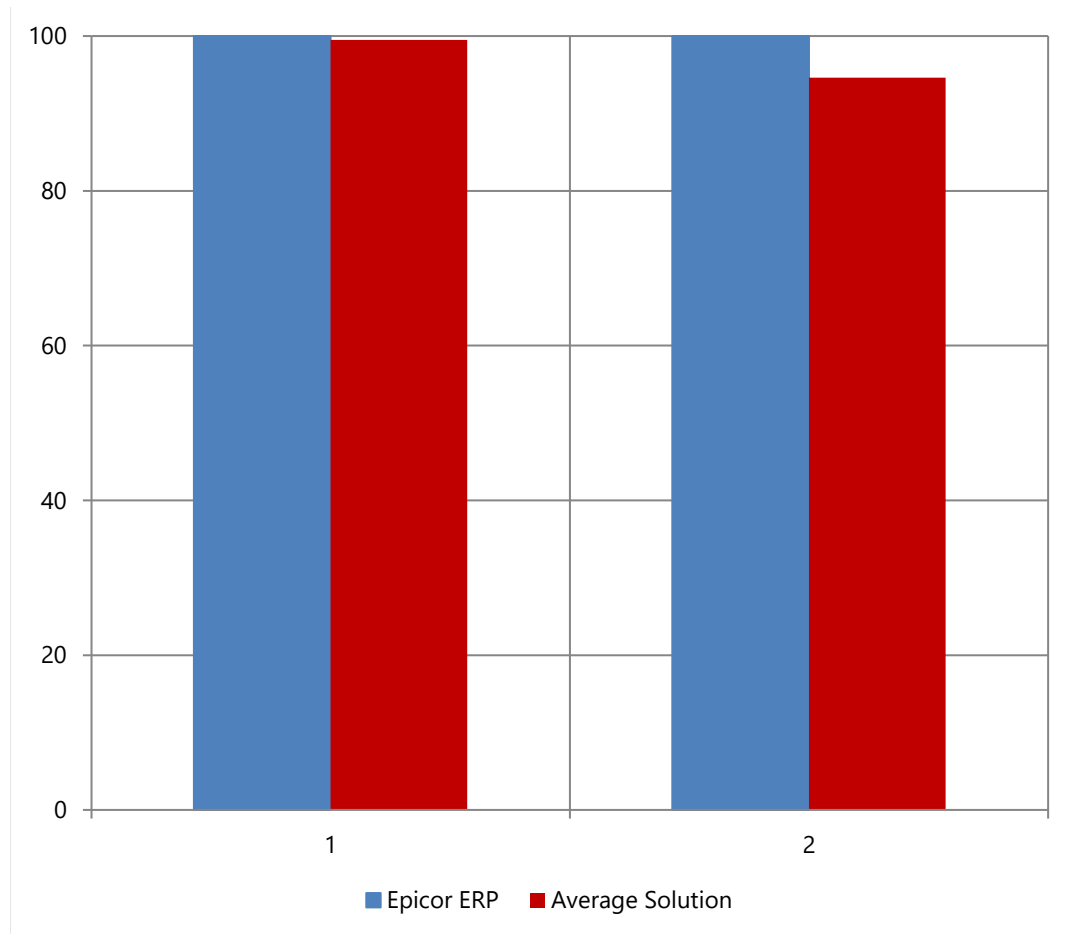
Accounts Receivable capabilities allow the tracking of payments due to a company from its customers. Accounts Receivable software contains tools to control and expedite the receipt of money from the entry of a sales order to posting payments received. The software should support such functionality as A/R company policies and procedures, customers/voucher master data, bill processing and aging analysis, credit management, cash/payment application, A/R transactions processing and control, journal voucher processing, multi-currency accounting and conversions, and A/R reporting.



Criteria	Epicor ERP Score	Average Score
1 Online Requirements	100	100
2 Processing Requirements	100	95.4
3 Data Requirements	100	98.2
4 Reporting Requirements	100	98.8
5 Interfacing Requirements	100	99.5
6 Credit and Collections Management	100	95.5

Financial Reporting

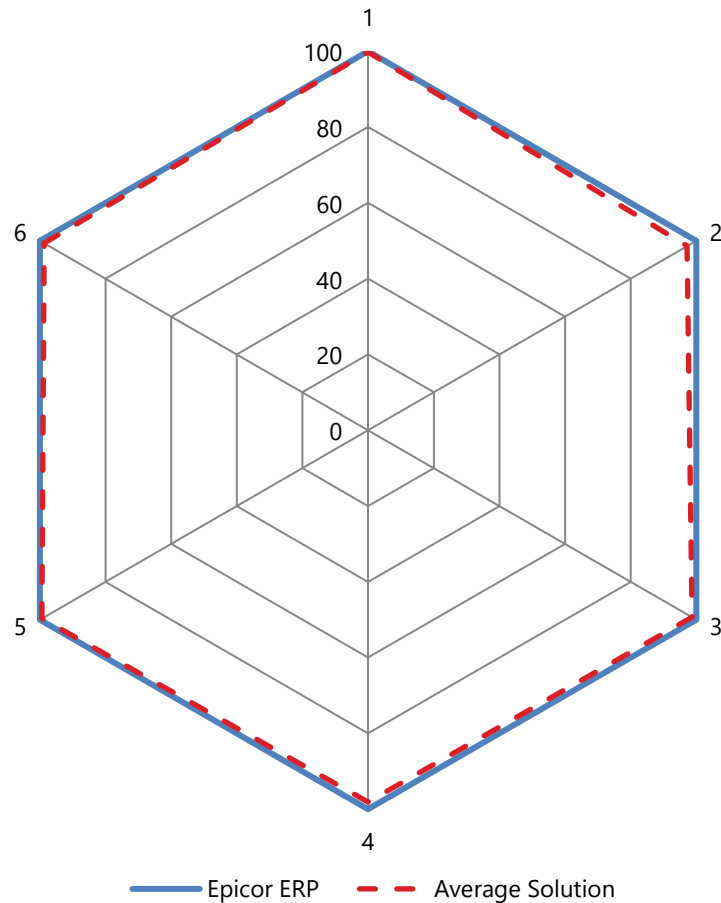
Financial Reporting enables the robust analysis of company performance through delivered reports. These reports allow individual business units to view their financial information, while parent companies can roll up all business subsidiaries and view the consolidated information. Additionally, solutions should provide user-generated reporting tools that are easy to use and provide sufficient depth of and access to financial data to permit comprehensive analysis.



Criteria		Epicor ERP Score	Average Score
1	Online Requirements	100	99.5
2	Miscellaneous	100	94.6

Project Accounting

Project Accounting uses financial practices to monitor the schedules and spending of projects. It includes such project-oriented functionality as project coding structure, project creation, project cost coding structure, project-related transaction processing, project accounting data capture, and reporting tools.



Criteria	Epicor ERP Score	Average Score
1 Project and Cost Coding Structure	100	99.8
2 Project Creation	100	97.2
3 Cost Coding Structure Creation or Maintenance	100	98.7
4 Transaction Processing	100	98.1
5 Line Item Data Capture	100	99.4
6 Reporting Format and Tools	100	98.7