


 APPROVED

EPICOR

Advanced Requisition Management

“Epicor Advanced Requisition Management enables us to keep tight control over capital and operational expenditure. More importantly it has improved process efficiencies, optimised inventory levels, and reduced costs right across our organisation.”

David Fisher

*Executive Manager, Business Services
Juniper*



Get visibility and take control of the spending in your business by effectively managing your entire procurement process with Advanced Requisition Management for Epicor ERP

Stay on budget and manage spend limits with automated processes and flexible multi-dimensional approval workflows

In today's economy there is no room for waste and inefficiency. Success is about reducing costs as much as it is about increasing revenue. Keeping tight control over capital and operational expenditure is a critical priority for any organization.

The key to efficient controlled spending lies in the ability to empower staff with requisitioning responsibilities whilst ensuring that contracted buying agreements and spending limits are enforced, with requisitions routed to the relevant individuals for approval in a timely manner.

This control needs to be streamlined to avoid extra steps and lengthy processes. With its budget and receiving tolerance checking, ability to provide more flexibility in requisitioning materials for jobs and a flexible approval and notification workflow engine, Epicor Advanced Requisition Management (ARM) streamlines and automates the entire procurement process – increasing efficiency and communication, enforcing control and driving down costs throughout your organization.

Tight integration with your Epicor system

Advanced Requisition Management was built to extend the requisition and purchasing functions within Epicor ERP. It has tight real-time integration hooks with your Epicor system, giving your staff a seamless experience when it comes to the Epicor data that ARM uses and the transactions it creates.

- All or part of the inventory items can optionally be available in the ARM catalogue.
- Purchase requests can be processed for Epicor jobs and projects.
- Non-inventory requests for goods and services are linked directly to GL accounts including budgets and GL splitting ability.
- Epicor suppliers and preferred suppliers are supported including integration with their online catalogue or web store.
- Multiple location and multiple company requisitions are supported.
- Purchase Orders, Transfer Requests, Receipts and Accounts Payable Invoices are automatically generated within Epicor.

What are the main differences between Epicor Advanced Requisition Management and standard Epicor Purchase Requests?

Epicor Purchase Requests have been built primarily on the premise that you are requisitioning material or a subcontract operation for a job that is part of the Method of Manufacture (MOM). As long as you don't want to change the MOM or you don't have a non-linear approval flow, Epicor handles this quite well. The challenges occur in the following circumstances;

- You want to control the procurement process for non-job and non-inventory OpEx and CapEx spend and/or alert the Requestor and Approver if they are over budget.
- You want to change the MOM in any way - for example, use an alternative material or accommodate an ad-hoc change or unexpected need.
- You want a more granular approval workflow which accommodates multiple dimensions at a line level rather than being limited to approval at the 'Buyer' level for the whole purchase request.

Advanced Requisition Management automates these steps for you, enabling you to easily fulfil these functions without a labour cost overhead. Processes are streamlined, eliminating costly errors and enabling your staff to source materials, goods and services faster.

How would I purchase alternate materials for a manufacturing job in Epicor without ARM?

You would need to go into the job in Epicor, 'un-release' the job, 'un-engineer' it, go into the MOM, add the new material/sub-contract operation, 're-engineer' the job and then 're-release' it. In ARM, you would simply process a requisition line against the job and all of these steps will be automated for you once the approval takes place.

How would I set up Epicor to allow my staff to purchase non-inventory goods and services without ARM?

You would need to set up Part Classes for all categories of spend you wish to capture as the GL account is linked to the Part Class. Depending on how granular you want to get and how your GL is structured, you may need to set up hundreds of Part Classes! In ARM, you would set this up easily within the ARM Catalogue. ARM also checks GL budgets during the procurement process whereas Epicor does not. This helps you stay within budget when it comes to expenditure.

Epicor has an approval workflow for Purchase Requests. What is the difference between this and the ARM workflow?

The Epicor approval workflow uses the 'Buyer' that is on the Purchase Request header as the point of approval. A Buyer is linked to a Part Class. So, approval is based on a whole request rather than at the line level. This means that if you have lines in the Purchase request for different Part Classes, the approval will not be routed to the correct person. The ARM Approval Workflow is extremely flexible and superior with its multi-dimensional approval options at the line level, incorporating a combination of GL Account, GL Account Mask, Part Class and Location (which could be a physical site or logical business unit or department). Each line may also need multiple people approving it depending on your circumstances and rules, which is also supported by ARM.

Multi-dimensional Approval Workflow

- Routing of approvals based on authorization limits and next approver.
- Design approval 'trees' based on GL Account/ Account Mask, Category/Part Class of the item or goods/services being requested, and/or Location/ Site/Warehouse the request is for.
- Automate the delegation of tasks to other team members to account for absences or team changes.

Accounts Payable Approval Workflow

- Easily manage variations between receipt and AP invoice values with tolerance levels.
- Ability to attach a scanned copy of the invoice that flows through to the AP Invoice record.
- Easily add miscellaneous lines that appear on the invoice but weren't captured on the PO, such as freight.
- Support of two- and three-way matching.

Real-Time GL Budget Checking

- If configured, ARM will check the requisition amounts against the GL Budget linked to all non-inventory Catalogue and Non-Catalogue items for any ARM users required to follow GL Budget checking, real-time every step along the approval chain.
- If over budget, the user will be alerted visually in ARM, however the requisition can still be submitted and the approver can decide on the action to take.

Support for Preferred and One-Time Vendors

- If pricing arrangements have been made with your suppliers, ARM ensures these prices are utilised via Preferred Suppliers for Catalogue and Inventory items.
- No need to set up new vendors for one-off purchases, as this is easily managed within ARM and integrated to Accounts Payable.

Standing Orders and Blanket Orders

- Create a Standing Order in ARM and then generate recurring orders automatically from this template, based on a configured recurrence pattern.
- Create a Blanket Order for a supplier where you have an arrangement to draw down against the PO, for example a one year contract for maintenance services.

Manage Supply Bids with Request for Quote

- Easily create a Request for Quote (RFQ) for suppliers to invite them to bid on your purchase request.
- Centralised management of the communications between you and the suppliers bidding for the opportunity, including win and loss communication.
- Turn the successful RFQ into a requisition line to be submitted for purchasing approval.

Internal Transfer Requests

- Control if a material is requisitioned from another location, or purchased from a supplier, and whether it should go into stock or be automatically expensed on receipt.
- Requisitions generate a transfer request in Epicor after approval.

Integration with Supplier Websites

- Access or 'punch-out' to a suppliers web store and add items to the suppliers shopping cart.
- The shopping cart is returned back into the ARM requisition, ready for approval and subsequent PO to the supplier.

How Procurement Automation can optimize your business

- Greater control and visibility of business spend and the procurement process.
- Elimination of time-consuming and non-value adding manual steps.
- Standardized workflows and approvals across the organization.
- Automation of discrepancy management and budget checking to stay on track.
- Compliance to preferred suppliers and pricing contracts.
- Faster sourcing of materials, goods and services.
- Less non-preferred suppliers means less risk and greater cost savings.
- Better handling of low dollar purchases to free up time for managers.
- Electronic processing for faster results and less paper management.



Let's chat!

Advanced Requisition Management will give you full electronic procurement functionality within your Epicor ERP system in an easy to use, low cost solution. If your current processes are cumbersome and cause bottlenecks, you need to consider Epicor ARM for procurement automation.

We would love to show you how ARM works in a quick 20 minute, obligation-free overview from the comfort of your desk, so you can discover how you will get immediate return on investment by streamlining your purchasing processes with ARM. We invite you to call us now!

About Precise Business Solutions

Precise Business Solutions is an award winning Epicor Certified Partner with offices globally. As one of Epicor's longest-standing and well-respected Platinum ISV Alliance Partners, Precise has developed tightly integrated add-on solutions for Epicor ERP customers, extending the value of their Epicor solution. ERP Software experts since 1995, Precise has successfully implemented hundreds of ERP projects. We are focused on partnering with our customers to help them execute their strategies and build value in their business through their Epicor ERP investment. The development of the Precise Epicor integrated companion solutions has been a result of the close relationship Precise has enjoyed with our customers to understand their core challenges and needs in these specialty areas.

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