

Simpler, faster, and laser-focused collaboration

Previously, collaborating with your colleagues meant you sent out entire spreadsheets for checking and approval. With EFP, you now have the ability to highlight only the cells you want changed, put in explanations, and then submit it for checking and approval. Meanwhile, when the approver gets it, it will have the highlighted cells and an explanation of what's different.

After being checked and sent back, you will then have color-coded cells that indicate whether they are approved or not and why. This fundamentally changes the way you collaborate within the organization. It is now faster, simpler, and more focused—ensuring your entire team not only saves time, but also focuses their energy and effort into more important tasks.

Advanced calculations and logical business mapping tool

EFP allows its users to perform complex and advanced rule-based calculations that can be automated such as cash flow and other standard statistical accounts or HR rules

Sleek-looking and easy to use

Without a doubt, EFP looks more sleek, modern, and intuitive.

Your menu options can be found on the right and left side of the tool for ease of use and clarity.

The web version is purely focused on ease of use for business users.

Improved, unified, and simplified organization management

EFP automates and unifies management of security, workflow, access, and distribution of tasks and follow-up reports.

It is designed to make managing access and tasks effortless.

Security access designed to fit the way you work

Do you need specific people to access the FP&A solution a few times a year? Do you want them to see only certain information that concerns their line of work?

Epicor Financial Planner offers role-based security to give each user in your organization access to functionalities and data needed to fulfill their role in an easy way. Whether you need your people to access EFP daily or once a year, EFP supports your way of working.

The platform that ties all your technology investments together

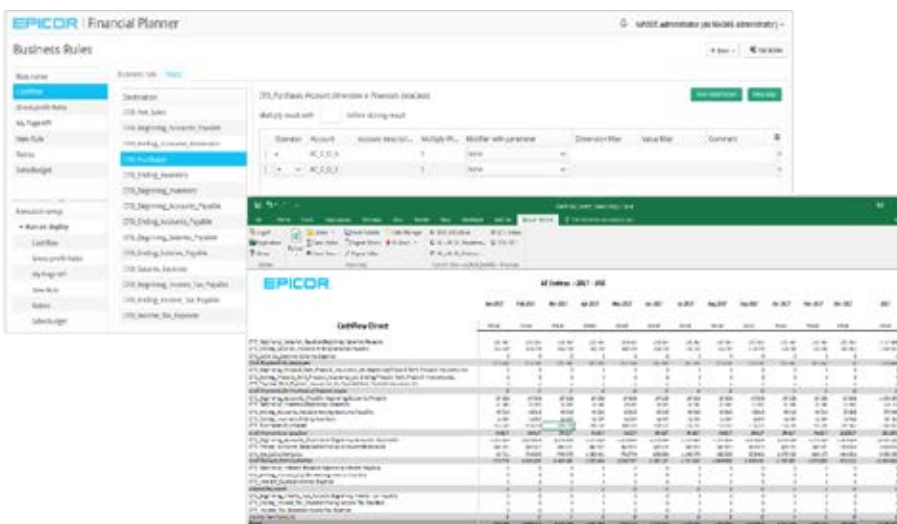
One of EFP's strongest capabilities is its integration. EFP offers you and your organization a smooth flow of information across systems because it can integrate with your ERP system or any of your line of business systems.

With EFP, you are afforded a single source of verifiable information across the organization and you can be guaranteed that all your previous technology investments will be maximized as EFP ties all of these systems seamlessly giving you an FP&A process that is accurate, reliable, and auditable.

EFP has built-in on-premise connectors so you can enjoy the benefits of doing FP&A in the cloud while still running on your on-premises system.

Seamless integration with Epicor

- ▶ EFP integrates with cloud ERP systems and on-premises ERP systems alike
- ▶ OLAP cubes/data warehouse database tables stored on powerful servers in the cloud—relieving your ERP from reporting burdens
- ▶ Import of initial budgets from Excel or external files—where you need to include COA
- ▶ Budgets can be uploaded back to ERP system
- ▶ External data sources supported via Excel or web services
- ▶ Export to Excel from web



Radically improved FP&A capabilities

- ▶ Enter your budget or forecast in web or Excel
- ▶ Overview of pending tasks, person responsible, and task status
- ▶ No need to reject or approve all numbers—select numbers can be approved or rejected
- ▶ Actuals vs budgets comparisons
- ▶ Unlimited number of scenarios and budgets
- ▶ Supports unlimited number of entities
- ▶ Driver-based budgeting
- ▶ Rolling forecasts and live forecasts
- ▶ Full Excel capabilities enabled—conditional formatting, formulas, cell references, charts, and calculated fields
- ▶ Excel reporting and sending of reports via email
- ▶ Dynamic periods
- ▶ Financial and operational modeling
- ▶ Drill up, down, and through capabilities
- ▶ IFRS and US GAAP supported

Secure and comprehensive

- ▶ Multiple user authorization and security levels
- ▶ Simplified and controlled data entry through preset business rules
- ▶ Self-check mechanism
- ▶ Functionality to easily review pending and submitted tasks

User-friendly

- ▶ Sleek-looking and modern user interface
- ▶ Easy editing and maintenance of FP&A COA hierarchies
- ▶ Simplified user access management
- ▶ Easy configuration of preferences setup
- ▶ More than 30 ready-made budget report templates available

- ▶ Drag and drop report wizard
- ▶ Automatic submissions across the entire platform

Minimum system requirements

- ▶ Microsoft® Excel® 2013 or later
 - 32- or 64-bit version
 - Microsoft Excel must be license activated—trial license is too limited
- ▶ Minimum physical memory available to Excel
 - 4 GB RAM (32-bit)
 - 8 GB RAM (64-bit)
- ▶ Windows 10 or later
- ▶ Browser
 - Any modern browser



About Encompass

Encompass Solutions is a business and software consulting firm that specializes in ERP systems, EDI, and Managed Services support for Manufacturers. Serving small and medium-sized businesses since 2001, Encompass has helped modernize operations and automate processes for hundreds of customers across the globe. Whether undertaking full-scale implementation, integration, and renovation of existing systems, Encompass provides a specialized approach to every client's needs. By identifying customer requirements and addressing them with the right solutions, we ensure our clients are equipped to match the pace of Industry.



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