

Sales Management

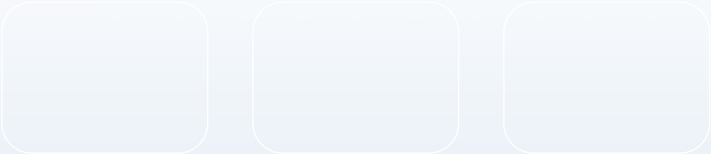
Business without Barriers

EPICOR®

Driving revenue by reducing the barriers between you and your customers.

Sales Management

- Estimate and Quote Management
- Order Management
- Demand Management
- Advanced EDI
- Storefront



Epicor Sales Management

Customers' demands for choice and flexibility translate to real opportunity for companies that can respond with agility and speed. Solutions that support your need for information about products, capabilities, and customers can offer measured advantage against competitors and ensure your company high marks.

Not only are businesses today looking for price, quality, and delivery, they expect fast and accurate responsiveness in all supplier interactions. Suppliers that can successfully demonstrate how easy it is to do business with them—that they have the tools and systems in place to support complex processes, products, and services—are realizing real competitive advantages.

Epicor Sales Management delivers a comprehensive suite that enables you to produce accurate estimates, streamline your order-to-cash cycle, and fulfill perfect orders that ensure world-class customer satisfaction.

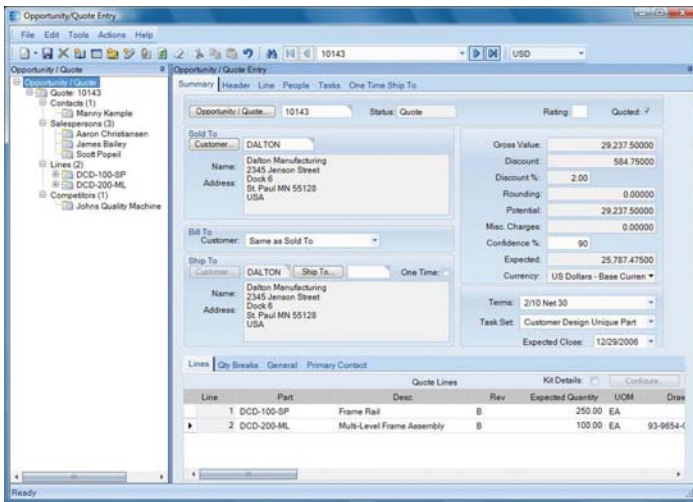
By streamlining the sales process with centralized access to product, pricing, and customer information, orders can be generated with a minimal number of steps. Epicor Sales Management automates and improves labor-intensive processes for quoting, proposal generation, configuration and order entry, enabling you to improve sales productivity by increasing accuracy during the quote and order processes, and identifying the right solution to meet customers' needs.

Estimate and Quote Management

Easily generate and track all customer or prospect requests for quotation (RFQs), from the time of receipt until an order is placed. You can get quotations out more quickly and be more accurate with pricing and lead times.

Estimating

Calculate material, subcontract, labor and burden costs for multiple quantities of a part with information from the last time you quoted or ran the part, from a similar part, or from the Bill of Materials (BOM). Add any special charges (e.g., tooling or design). When the order arrives, punch a few keys and the detailed routing will be ready to go to the floor or to make additional changes.



Generate accurate and timely estimates and quotes, and import data from a variety of customer and system sources.

Standard Routings

Pull same-as-except type parts into a quote, then modify them quickly and easily to create a new one.

Pipeline Management

Track confidence levels by quote line to accurately predict pipeline activity.

Drag-And-Drop Interface

Use a tree interface to drag-and-drop components, operations or materials from another quote, BOM or previous job.

Realistic Cost Estimates

Perform realistic cost estimating with minimum lot charges, price breaks, and scrap factors on materials and subcontracting.

Inventory Availability

Check inventory availability during quote entry.

Request Supplier RFQ

Create request for quote (RFQ) requests to trigger buyers to solicit suppliers for pricing of materials required in the quote process. Review responses once submitted for inclusion in the estimate.

Markups

Specify and store individual markups for material class, subcontracting, operations, and special costs.

Order/Job Integration

Transfer quote information to a sales order or job. Built with tremendous flexibility, there are multiple ways to process an order and job from an existing quote such as:

- Push to an order by the line item
- Flag as won, automatically generating an order
- Pull from Order Management with flexibility to define specific lines and quantities desired

Part Advisor

Drill down into the quote/job/part status and history, and answer critical questions related to a part:

- Have I quoted it before?
- Are there current orders for it?
- Have I run it before?
- Am I currently running it?
- Do I have any in inventory?
- Is part profitability available?

Prospects

Send quotes to prospects, even if they don't exist in the customer file.

Quote Tracker

Instantly query summary and detailed information on an estimate/quote.

Competitive Analysis

Track all competitors to find out where you are winning and why you may be losing.

Workflow

Manage the sales cycle with dynamic task lists that ensure the right people are working on the quote at the right time.

Part Cross-Reference

Cross-reference customer part numbers to your part numbers automatically during the quoting process.

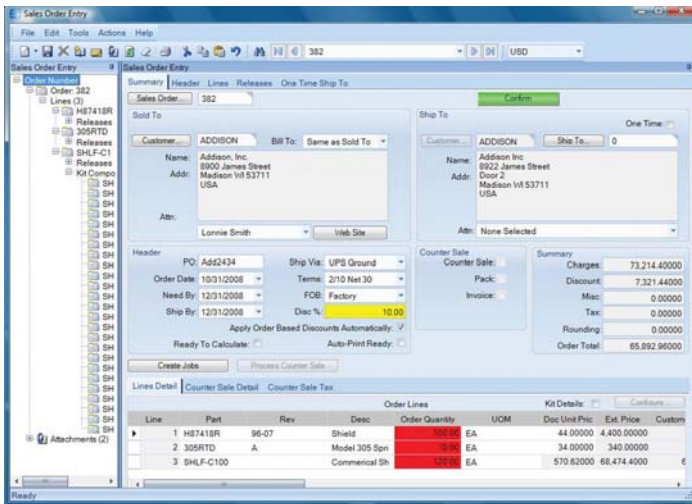
Material Calculation and Machine Time Estimation

Epicor offers real-time integration to industry-leading estimating solutions for material calculator functionality as well as machine time estimation.

Order Management

Order Management drives the Epicor system. From the time an order is entered, its progress is tracked through final shipment, producing perfect order fulfillment on demand.

With Order Management, all orders and change orders will be effectively managed online, perfecting the order-to-delivery process for maximum customer satisfaction.



Manage sophisticated sales requirements from the time an order is entered until final shipment.

Blanket Orders

Establish multiple releases (either firm or not firm) for each sales order line and pull parts directly from inventory. Optionally lock the order line quantity allowing new releases to decrement the final delivery quantity on the final delivery date, keeping the total line quantity in balance with the release.

Credit Checks

Check customer credit status online at quote entry, order entry, and shipment entry.

Multiple Ship-to Addresses

Track multiple ship-to addresses per order release.

Alternate Bill-to and Sold-to Customers

Application for payment may be required from a different customer than the customer order/receiving the goods or bill third-parties, such as a customer of your distributor.

Ship From Multiple Locations

Ship an order from multiple plants and multiple warehouses.

One-Time Shipments

Do a one-time shipment to an address in Order Entry.

Fulfillment and Allocation Processing

Access to fulfillment and allocation processing within sales order processing. Use the Fulfillment Workbench for allocation or reservation and distribution processing, and plan for sales, transfers and job order types. Various fulfillment techniques, such as pick and pack, console-driven, and pre-pack processes may be performed through the use of templates to automate the fulfillment process for each. Hard allocation to finite level, versus reservations processing, may be launched directly from the order, line, and release areas as well. This feature also includes cross-docking capability.

Fulfillment Queue Management

Manage your work queues and assign tasks that are created by, but not limited to, the fulfillment-allocation process. Choose whether the shop floor operates based on paper, or becomes a paperless operation with automatic user-assignments driven by the Material Queue.

Put Transaction Type

This transaction type is for all directed put-away transactions, including purchase order receipts, transfer receipts, RMA receipts and job receipts.

Pick Transaction Type

This transaction type is for all directed pick transactions. This includes sales order picks, issues to jobs, transfer picks, cross docking, and any bin-to-bin movements.

Pack Transaction Type

This transaction type tracks work station loads. During the pick process, the application calculates which suggested work station should pack the order based on load.

Fulfillment Queue Tracker

Use the Queue Tracker to view the status of put, pick, and pack transaction types. Managers can view all shop floor activity or filter on the various queue transaction types, each of which have unique identifiers. Warehouses and bins use attributes to identify what specific transactions need special equipment, and the Queue Tracker assigns only those resources or groups with the ability to operate the specialized machinery. Managers also create resources and groups and assign them transaction types and the priorities in which the transactions should be executed.

Drop Ship and Buy to Order

Provide the ability from within a sales order to define a part as being "Buy-to-Order." This may or may not be defined as a drop ship item. In both cases, the purchase order will be linked to the sales order directly.

Cross-Docking

In conjunction with the fulfillment process, cross-docking provides the ability to directly link future inbound supply of items from purchase orders or jobs directly to demand from sales orders, transfer orders, or jobs. When the cross-docked items are received, they are immediately directed to the demand they are linked to, minimizing the time and task to fulfill the order or job.

Sales Kits

Flexibility in selling items in kits includes configured item kits, optional price rollup and item substitution, mandatory ship complete, and optional printing of kit components on the packing slip and invoice.

Backorders

Automatically create backorders for lines shipped incomplete. Flexibility enables customer-specific backorder parameters for complete order lines or complete orders to be set.

Sales Commission

Manage sales commission calculations for direct and indirect sales teams. Allocate commission percentage over multiple sales entities per order line.

Price Lists

Generate customer, product group, warehouse, and product-specific pricing hierarchies while matching the end-user currency. For global enterprises, company, plant, and warehouse pricing offers flexibility in pricing products.

Up-Sell, Cross-Sell, and Down-Sell

Improve order accuracy and ability to enhance sales with Up-sell, Cross-Sell, and Down-sell capabilities. At time of sales order entry, users are prompted with suggestions for "Upgrades," "Downgrades," "Substitutes," and "Complements." Whether substituting the original part with an upgrade or downgrade or adding complementary products; improved customer satisfaction alongside enhanced sales is the return.

Order-Based Discounts

Apply order-based discounts on an order value or product quantity basis. Optionally override and lock pricing.

Miscellaneous Charges

Enter unlimited miscellaneous charges or credits on each order header or order line. These charges will then print on the order and carry over to invoicing.

Order Tracker

Use order tracker to see a summarized view of the order, then drill down on selected items to see greater details (e.g., lines, releases, shipments, charges, bookings, audit, and payment information). Use real-time data to link to other parts of the system.

Copy Order and Build Order

Simplify repeat orders with the Copy Order function. Optionally build order from history. See previous orders and enter the quantity on the order form.

Capable-To-Promise

Provide accurate, real-time delivery dates to customers when using Advanced Planning and Scheduling (APS). Furnish a realistic promise date to your customer by finding out how a quote would fit into your current schedule.

Available-To-Promise

View running balances during order entry. Enter a quantity, and the system will find the earliest date that quantity will be available. Enter a date, and see how many parts are available on that day.

Order Job Wizard

Generate appropriate jobs for new orders in a single step that enables the user to create, plan, schedule, and release jobs against multiple lines and multiple releases.

Project Management

Link sales orders, jobs, purchase orders, field service calls, cases, tasks, milestones, and budget information to manage projects.

Counter Sales

Automate the pick-up, shipment, and generation of sales invoices for walk-in customers.

Tax Calculations

Tax calculations and fields are available at the sales order, line, and release levels.

Credit Card Processing

Epicor Credit Card Processing includes easy to use maintenance for initial setup along with a variety of integration points to bring an easily deployable solution to your business that meets the security guidelines as specified in the Payment Card Industry Data Security Standard including securely encrypted account numbers and key management. Epicor Sales Management uses Epicor Credit Card Processing to support authorization with the sales order, reauthorization with the sales order before picking and shipping, and complete or partial funds collected with the sales order.

Customer Portal Content Pack

Epicor Portal Customer Content Pack provides interactive customer facing content that supports strategic goals for improved customer communication and direct collaboration on day-to-day business, right from your intranet and extranet. Additionally, customers enjoy 24x7 self-service and can access, review, and make online requests for quotations. Epicor Portal Customer Content Pack is designed to deliver all the information your customers are looking for; open and closed orders, shipments, return material authorizations (RMAs), invoices and credit memos along with payment history and service calls.

Demand Management

In today's climate of shorter lead times, more frequent orders of smaller quantities, and where meeting customer demand secures your competitive edge, companies must find ways to anticipate changes in customer demand. Epicor Demand Management responds to these business conditions and incorporates the requirements of Electronic Data Interchange (EDI) to help your company reduce lead time in the office for planning and procurement, thus enabling you to respond on the production floor faster.

Demand Management offers the establishment of contracts that can be linked to sales orders and releases. These contracts can be managed, and schedules produced, automatically with set periodicities that match each customer's unique shipping needs. Additionally, as change happens, the schedules can be regenerated. If Advanced EDI is deployed, your customers' electronic demand changes are brought in for review and acceptance. This is important for companies doing business in industries such as automotive, aerospace and defense, and retail. Accountability of change and rapid flow of information to the production floor, as a result of fully integrating EDI with your Epicor system, can elevate your supplier status.

In addition, Demand Management not only looks at the demand side of EDI, but also focuses on the fulfillment side with secure outbound Advanced Ship Notice (ASN) transactions that the customer reconciles with each shipment. Through an inbound EDI document, the CUM (Cumulative) total value and actual received quantity is then electronically sent back to you for reconciliation and potential adjustment.

Schedule Sequence	Demand Type	Ship By	Need By
1	Forecasts	10/31/2008	10/31/2008
2	Forecasts	12/31/2008	12/31/2008
3	Forecasts	01/07/2009	01/07/2009
4	Forecasts	01/14/2009	01/14/2009
5	Forecasts	01/21/2009	01/21/2009
6	Forecasts	01/28/2009	01/28/2009
7	Forecasts	02/04/2009	02/04/2009
8	Forecasts	02/11/2009	02/11/2009
9	Forecasts	02/18/2009	02/18/2009
10	Forecasts	02/25/2009	02/25/2009
11	Forecasts	03/04/2009	03/04/2009
12	Forecasts	03/11/2009	03/11/2009
13	Forecasts	03/18/2009	03/18/2009
14	Forecasts	03/25/2009	03/25/2009
15	Forecasts	04/01/2009	04/01/2009
16	Forecasts	04/08/2009	04/08/2009
17	Forecasts	04/15/2009	04/15/2009
18	Forecasts	04/22/2009	04/22/2009
19	Forecasts	04/29/2009	04/29/2009
20	Forecasts	05/06/2009	05/06/2009
21	Forecasts	05/13/2009	05/13/2009
22	Forecasts	05/20/2009	05/20/2009
23	Forecasts	05/27/2009	05/27/2009

Review incoming demand schedules generated manually or through Electronic Data Interchange (EDI).

Sales Contracts

Contract structure that provides the ability to have many sales orders/lines attached to the contract.

Schedules

Manually generate release schedules based on defaulted customer periodicity and release quantity.

Schedule Review

Review balances as well as proposed quantity of proposed schedule.

CUMs

Manage and reconcile the cumulative shipping quantity.

Forecast

Schedule forecasted deliveries that can be utilized in conjunction with MRP to predict demand for resources and provide guidance on pending demand for materials.

Periodicity

Specify rules by plant or plant/supplier for automatic purchase schedule suggestions. Periodicity rules can be specified as Daily, Monthly Forward, Weekly Forward, and Nth Day of Week.

Contract Start and End

Manage contracts effectively with contract start and end date.

Mass Review

Review the demand in mass and make modifications prior to generation of forecasts or sales orders. Choose by part or demand for acceptance/rejection of schedules.

Electronic Data Interchange (EDI)

EDI is the traditional form of exchanging information electronically and is utilized by many suppliers to manage their supply chains more efficiently. Epicor Advanced EDI, used with Demand Management, provides a common interface for managing and exchanging large volumes of data. Demand Management handles creation, analysis, scheduling, and reconciliation of cumulative releases from your customers. You can use Demand Management without Advanced EDI and vice versa.

Epicor Advanced EDI functions are tightly integrated with the Demand Management module and facilitate electronic communication of release and ASN information to and from your customers. Advanced EDI offers direct integration with your Epicor data, reducing the turnaround time on schedule changes and additions, and eliminating potential data entry errors. Epicor Professional Services are experienced in making EDI work in various environments with various EDI suppliers, and can offer enhanced functionality that is tailored to the EDI needs of your business.

Release Accounting

The Demand Reconciliation screen helps in the cumulative matching process with the ability to easily make reconciled quantity adjustments. Cumulatives are tracked at order, shipment, and invoice levels over the life of the contract.

EDI Transactions

Advanced EDI supports ANSI X12, EDIFACT and AIAG documents, including Purchase Order Inbound (ORDERS, 850), Purchase Order Acknowledgement (855), Planning Schedule Inbound (DELFOR, 830), Shipping Schedule Inbound (DELJIT, 862), Change Order Inbound (ORDCHG, 860), ASN Outbound (DESADV, 856), and Invoice Outbound (INVOIC, 810). Additional documents may be available or developed by Epicor Professional Services.

The Demand Entry screen is the obvious place for processing incoming EDI transactions that are related to cumulative release schedules; in fact, it is where you can review all incoming Advanced EDI transactions and set up, by trading partner, which to automatically process, whether as forecast, un-firm, or firm releases.

Web Services for Easy Collaboration

Epicor Service Connect consists of security, messaging, workflow orchestration, transformation, scheduling, notification, exception handling and Web Service components. It can be used to setup secure EDI orchestrations between Epicor and external trading partners. A runtime version of Service Connect is included with Epicor, or you can purchase full-use Service Connect for more control.

TIE Commerce® Software

Epicor has partnered with TIE Commerce to ensure close collaboration during implementation of Advanced EDI solutions. TIE's Business Integration products support all industry B2B e-commerce standards, and communication and security infrastructures.

Storefront

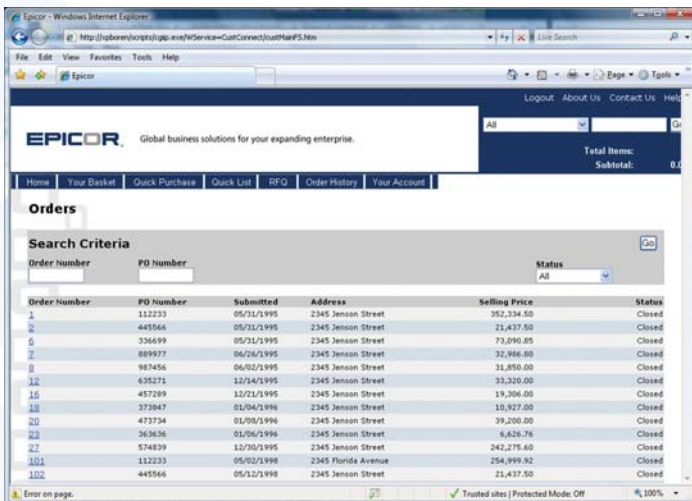
New revenue opportunities and sales efficiencies are available to companies that successfully engage customers through their website. By shortening the time from when an order is taken to the time of shipment, you can create a competitive advantage. Opportunities to reach out to untapped markets also drive companies to deliver e-commerce solutions—one more tool companies can deploy to demonstrate how easy and open they are to do business with.

Epicor Storefront sits along extended portal technology to offer a fully functional extension to your Web site that includes customer portal capabilities along with Epicor Sales Connect (sales portal) and web configuration features.

Storefront and Customer Portal

The purchase process through the Storefront begins when a customer enters your online store. Once there, they can browse a catalog or check product descriptions, product pictures, and graphics, as well as access links to additional comments or technical descriptions and prices.

Storefront enables you to leverage the advanced functionality to provide customers with special pricing, including customer-based discounting. When the customer decides to purchase an item, they simply add it to their shopping cart and submit an order. The order is now ready to be processed by Epicor. Once the order has been placed, the customer receives an order confirmation via e-mail with their order number. Epicor Storefront provides an online, self-service application for your customers. Simply put, your customers can see more, do more, and buy more, 24 hours a day, seven days a week.



The screenshot shows the Epicor Storefront interface in a Windows Internet Explorer browser. The page title is "EPICOR Global business solutions for your expanding enterprise." The navigation menu includes "Home", "Your Basket", "Quick Purchase", "Quick List", "RFQ", "Order History", and "Your Account". The "Orders" section is active, displaying a "Search Criteria" form with fields for "Order Number", "PO Number", and "Status". Below the form is a table of orders with columns for "Order Number", "PO Number", "Submitted", "Address", "Selling Price", and "Status".

Order Number	PO Number	Submitted	Address	Selling Price	Status
1	112233	05/31/1995	2345 Jensen Street	352,334.50	Closed
2	445566	05/31/1995	2345 Jensen Street	21,437.50	Closed
5	336699	05/31/1995	2345 Jensen Street	73,090.85	Closed
7	889977	06/26/1995	2345 Jensen Street	32,966.60	Closed
8	987456	06/02/1995	2345 Jensen Street	31,850.00	Closed
12	635271	12/24/1995	2345 Jensen Street	20,320.00	Closed
15	457289	12/21/1995	2345 Jensen Street	19,306.00	Closed
18	373847	01/04/1996	2345 Jensen Street	10,927.00	Closed
20	473734	01/09/1996	2345 Jensen Street	39,200.00	Closed
23	363636	01/06/1996	2345 Jensen Street	6,626.76	Closed
27	574829	12/30/1995	2345 Jensen Street	242,275.60	Closed
101	112233	05/02/1998	2345 Florida Avenue	256,999.92	Closed
102	445566	05/12/1998	2345 Jensen Street	21,437.50	Closed

Provide a self-service Storefront for your customers to place orders and track their purchases.

Personalization

Easily create and set up a personalized site with Storefront. Modify the Web content to add your corporate logo, change colors, add Web links, or create other information. Personalizing your site differentiates your Storefront from others in the marketplace.

Self-Service

Create a self-service application for your customers to check the online status of their shipments, orders, RMAs, field service, and invoices.

Online RFQs

Take service a step further by allowing your customers to submit requests for quotation with attached documents.

Single Login

Give customers a single login to purchase goods, review accounts, or locate shipments.

One Process

Place orders through the Storefront just like any other order within Epicor—no new processes to learn.

Web-Enabled Product Configurator

Enable customers to configure parts via the Web with the embedded Epicor Product Configurator.

Security

Present fully secured pages that customers can access—showing only relevant data to each party.

Customer Satisfaction

Service your customers 24x7x365 with up-to-date pricing, products, special offers, and the instant ability to place an order.

Online Catalog

Provide an online catalog for your customers to browse—including pictures and pricing.

Related Web Sites

Link your Storefront to other related sites to provide additional information.

Extensive Search

Offer search capabilities to your customers to enable them to find the exact product they need.

HTML Editor Support

Maintain your Storefront with popular tools such as Microsoft Office FrontPage®.

Sales Connect

Sales Connect allows your sales representatives and partners to access and update critical prospect information—from anywhere, at any time.

Out Of The Office—Not Out Of Touch

Provide remote access via a secured Internet connection for partners and sales representatives to:

- Create and manage their sales opportunities
- View their pipeline
- Configure products
- Define new customer accounts or edit existing information
- Access and update CRM information
- Log customer calls
- Create sales orders
- Manage and update suspect, prospect, customer and contact information

Security

Present fully secured pages that employees and partners can access—showing only relevant data to each party.

Task Lists

Create task lists within the application that track the “to-do’s” for every contact and customer.

Sales Roles

Create differentiating roles for every member of the sales team, including rep, territory manager and regional manager.

Personalization

Present different screens to different parties depending on their role (e.g., a sales rep sees different screens than a sales manager). Tasks can only be viewed by the appropriate roles.

About Epicor

Epicor Software (NASDAQ: EPIC) is a global leader delivering business software solutions to the manufacturing, distribution, retail, hospitality and services industries. With 20,000 customers in more than 140 countries, Epicor provides integrated enterprise resource planning (ERP), customer relationship management (CRM), supply chain management (SCM) and enterprise retail software solutions that enable companies to drive increased efficiency and improve profitability, and also empower global enterprises to achieve even greater success.

www.epicor.com

EPICOR.

Worldwide Headquarters

18200 Von Karman Avenue Suite 1000
Irvine, California 92612 USA
Toll Free: 800.999.6995
Direct: 949.585.4000
Fax: 949.585.4419
www.epicor.com

Latin America and Caribbean

Blvd. Antonio L. Rodriguez #1882 Int.104
Plaza Central, Col. Santa Maria,
Monterrey, Nuevo Leon, CP 64650
Mexico
Phone: +52.81.1551.7100
Fax: +52.81.1551.7117

Europe, Middle East and Africa

No. 1 The Arena
Downshire Way
Bracknell, Berkshire RG12 1PU
United Kingdom
Phone: +44.0.1344.468.468
Fax: +44.0.1344.468.010

Asia

238A Thomson Road #23-06
Novena Square Tower A
Singapore 307684
Singapore
Phone: +65.6333.8121
Fax: +65.6333.8131

Australia and New Zealand

Level 32, Northpoint
100 Miller Street
North Sydney NSW 2060
Australia
Phone: +61.2.9927.6200
Fax: +61.2.9956.8976

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