

Epicor Brochure

# Industrial Machinery

**EPICOR**



## A New Perspective for Industrial Machinery Manufacturers

Epicor understands that as an industry machinery or capital equipment manufacturer, you must identify, consider, and respond to a new set of challenges each day. Change in this industry is a given; managing the change with tools and services to distinguish your business from local and global competition is fundamental. With increasing pressure to reduce prices in a business climate of expanding raw material cost, reduced labor availability, and customers across the world. Businesses like yours are streamlining and adopting new technology to automate business processes for more competitive lead times and to reduce waste in the organization. In this increasingly competitive market, if you aren't keeping your customers happy someone else will. Epicor for Industrial Machinery can give you

the tools needed to compete in the industrial machinery industry, with a full range of functionality built specifically for companies like yours. From the initial customer contact to sales, planning, supply, production, fulfillment, accounting, and after sales service, our solution can help you manage every step along the way.

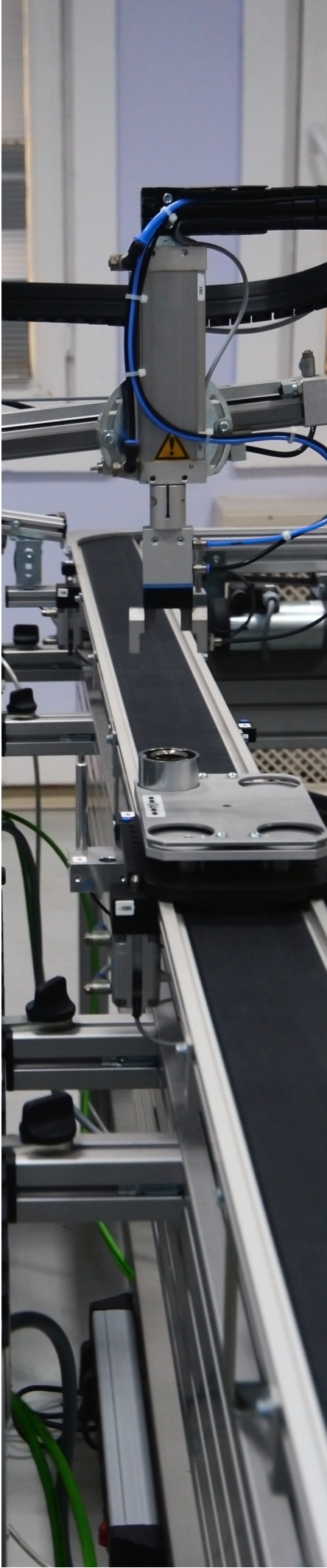
### Functionality

- Support for engineer-to-order and mixed-mode manufacturing
- Collaboration tools delivering enhanced cross-functional collaboration
- Embedded project management supports cost management and schedule visibility
- Product Lifecycle Management (PLM) for complex engineering intensive product control
- Embedded robust quality management to support stringent regulatory requirements

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- Support for multi-site, multi-plant and global operations
- Support for Field Services

### Enterprise, Customer, and Supply Chain Collaboration

Epicor Collaborate is a collaboration solution that helps provide a fundamental shift in the way organizations engage with their ERP to make decisions about their business. When workers engage with each other to solve problems and innovate processes, your business benefits and strengthens. By integrating unstructured meetings and conversations with your critical business ERP data and by enabling employee conversations digitally, you can help eliminate working silos, giving your business a competitive advantage.



Collaborate is an enterprise-wide collaboration and productivity tool built on the cloud. It's easy to use with hashtags and mentions, connecting groups of workers simply.

Collaborate will enable real-time collaboration in areas critical to success for your business such as; bid and proposal preparation, customer services, project management, engineering change control, and quality improvement initiatives.

Collaborate has key integrations that drive productivity including:

- Microsoft Teams® : integration enables teams with external players to connect on project details by Sharing Collaborate messages
- IoT: Notification of adverse events in Kinetic or directly from your equipment through IoT, drives new levels of responsiveness and productivity.
- Epicor Virtual Agent (EVA): Integrates to EVA, delivers on the simplicity through natural language to answer questions of Kinetic.
- Data Discovery: Offers users the ability to share Data Discovery metrics through Collaborate.
- File Sharing: Easily share files digitally with Collaborate

## Reduce Your Labor and Material Cost

Epicor for Industrial Machinery is a real-time solution designed to support paperless manufacturing. Through the use of Kanban production, Epicor for Industrial

Machinery will allow you to produce your fast moving products without setting up work orders and will create queue records for the work that needs to be completed, therefore eliminating the need for paper. Epicor for Industrial Machinery supports four types of Kanban, giving you the flexibility to run your work cells in a manner that best suits each situation or product. Whether you wish to replenish when minimums are met or replenish based on future demand, Epicor for Industrial Machinery can help to ensure that you have stock where you need it, when you need it. This solution combines the rules of material requirements planning with the efficiencies of Kanban manufacturing, giving users the ability to plan for the use of parts with long lead times, while at the same time allowing for replenishment of parts with little to no lead times. This flexibility to plan for all your resources leads to greater productivity and shorter lead times.

## Simplified Product Lifecycle Management

For companies in the industrial machinery industry, Simplified Product Lifecycle Management (PLM) is imperative. Development and design documents must be made available for the entire product lifecycle, from design to manufacturing, and thereafter, for access by service and sales departments.

Epicor Product Lifecycle Management (PLM) solutions provide you with CAD data management, product data management (PDM), and



technical document management system capabilities that can be expanded to deliver a fully-featured, collaborative product lifecycle management solution that is designed to seamlessly integrate into Kinetic. Epicor PLM serves as a central knowledge repository for process and product history and promotes integration and data exchange among all enterprise users who interact with a product. Epicor PLM manages all documentation associated with a product throughout its entire product lifecycle and includes full integration with numerous computer-aided design (CAD) systems and various electronic design automation (EDA) systems. It is particularly useful for companies that design what they manufacture, want standardized methodologies around workflow, use CAD or EDA systems, or use drawings to produce a quote or an order. Epicor PLM provides an electronic vault where documents can be securely stored and where access and versioning can be tightly controlled. The type of sophisticated document management



that PLM offers is critical for those organizations that need excellent audit tracking and control of all documents across the enterprise. PLM also provides advanced document search and retrieval functionality. Increase your productivity by more efficiently managing the product life cycle—from design to end-of-life. Engineering change order (ECO) processes are supported—including the ability to have as many 3D models as desired and any number of derived technical drawings from one or more CAD systems assigned to each part.

Epicor PLM supports the entire product change order management. All changes to CAD models or drawings are documented in a change history. History entries include date, change reason, and user. Additionally, processes defined using Epicor PLM Workflow assures change order control — from the beginning of the modification to the final release. All part master data, characteristics, and the change history journal are transferred and documented in the title block of the respective drawings.

Upon further modifications, this data is updated automatically. Additionally, the BOM can be inserted into the drawing.

## Improve Employee Productivity

### Production Management

Epicor for Industrial Machinery goes beyond traditional production functionality by offering a comprehensive manufacturing control solution designed to handle make-to-order, engineer-to-order and make-to-stock production. Epicor for Industrial Machinery’s Job Manager gives you the flexibility to review and update production plans as demand changes. The Planning Workbench provides you with access to all related job information in a single view, where you can track your costs associated to production, and compare estimated versus actual costing.

Innovative, easy-to-use scheduling tools help you identify and eliminate bottlenecks before they hit the shop floor. If you’re facing an overload at a critical work center, an operator can just drag-and-drop a job’s schedule forward or backward to alleviate the overload. Epicor for Industrial Machinery supports scheduling jobs based on forward, backward, finite, and infinite capacity. Machine and work center maintenance schedules are integrated with the production schedule, so you can minimize downtime while still tooling parts to exacting tolerances.

### Mobile Operations

The Data Collection module allows inventory movements and labor entries to be reported on the shop floor, giving management a more accurate, up-to-date view of production. Since Data Collection is integrated with Job Management and Scheduling, you can eliminate dual





entry of data. The Work Queues provide employees with prioritized work schedules, eliminating the need for print-outs or instructions from management.

The Advanced Material Management module (AMM) extends the Data Collection functionality to include queue requests for inventory movements of raw materials and WIP, as well as order allocations and inventory reservations. Within AMM, transactions can be entered on data collection devices, reducing the number of data entry mistakes and speeding up the process via barcode scanning. AMM also allows you to set up pick faces with replenishment levels that will automatically initiate inventory moves.

## Increase Profit and Maximize Sales Opportunities

### Increased Responsiveness

Customer Relationship Management (CRM) controls all aspects of a company's interaction with its customers and potential customers from generating the lead, developing the opportunity, taking the order, producing the goods, shipping the goods, getting the cash, and supporting the customer. Throughout this process, Epicor CRM allows the customer to be tightly involved within the entire supply chain process through collaboration using Collaborate.

For most industrial machinery companies, having the ability to commission and support your products once they have been shipped to the customer is an essential part of business. The Epicor for Industrial Machinery Case Management module provides a customer focused solution for personalized, high-quality service. Case Management is equipped with time-saving links to customer focused activities where customer

calls can be used to generate quotes, return material authorizations, place orders, field service jobs, or workflow tasks. Using Case Management helps you reduce the cost of offering quality service while maximizing the revenue potential of your field service employees. Collaborative social tools allow engineering, production control, quality and compliance, and service to subscribe to escalation groups and communicate on problem resolution and next steps.

### Servicing Your Products at Home and In the Field

Service Management is primarily designed for industrial equipment manufacturers who bring customer assets in house for repair or have light requirements for service or installations offsite that do not require purpose-built mobile access for field technicians. You can centralize all processes related to dispatching technicians and reporting costs of service calls in the





field with support for drop shipment of service parts directly to the customer site.

Extend the field services capabilities with Service Pro. Service Pro is most often used by industrial equipment manufacturers who service equipment, machinery, infrastructure, or other products at customer sites. With its visual scheduling capability and connected mobile app, a call taker or dispatcher can easily find the closest qualified technician who is available for the work assignment within the ETA window called for by the service level agreement. Additionally, they have visibility into all other scheduled and unscheduled appointments in their region to quickly identify opportunities to minimize travel time—for example, performing a planned maintenance task after completing a nearby repair.

For companies with advanced scheduling needs or very large technician teams, Service Pro Optimize can intelligently advise and automatically schedule work assignments based on the customer's most important criteria.

Use Service Pro mobile to improve customer satisfaction, increase field service technician utilization, and boost enterprise service efficiency with a proven cross-platform mobile field service application. If you're looking to truly automate your field service organization, a mobile app with offline functionality needs to be a priority.

Service Pro Mobile features include:

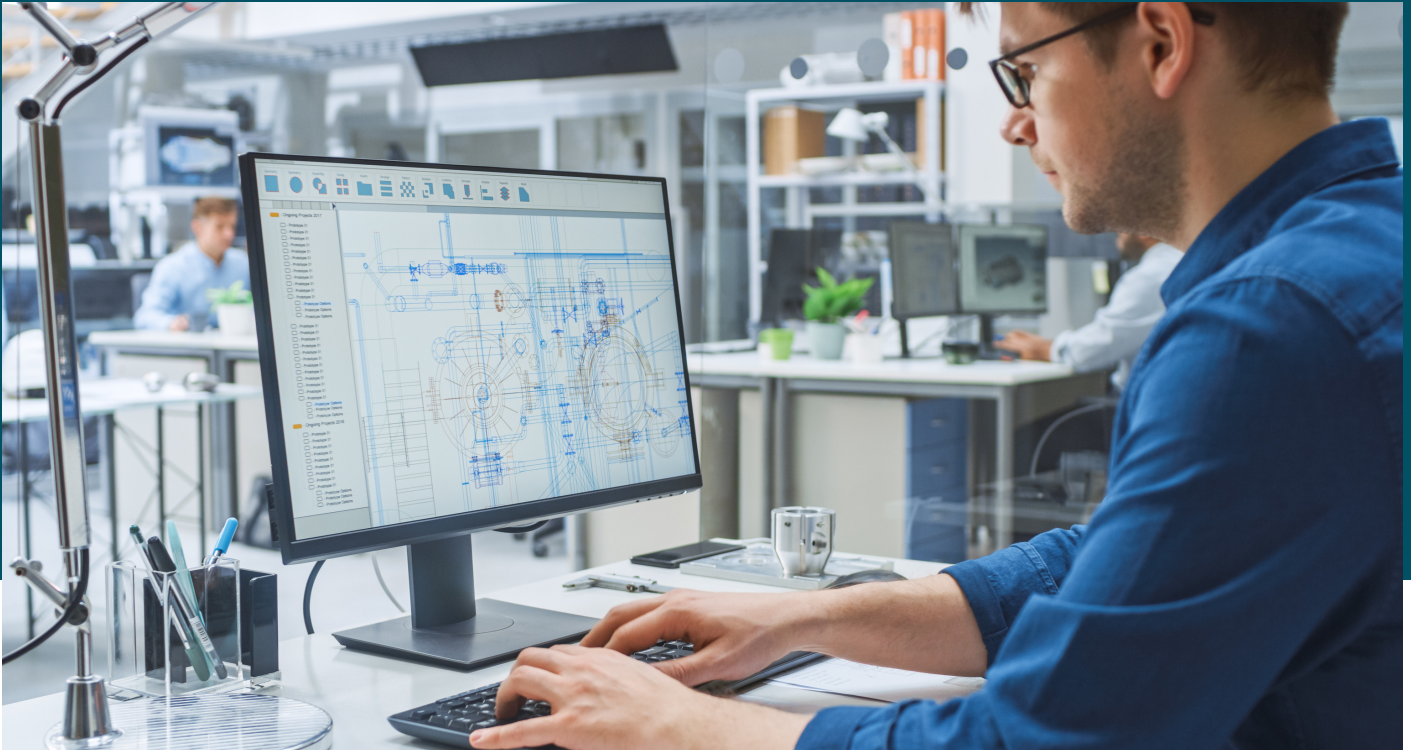
- Technician Status and Labor Time
- Mobile Asset Management

- Warranty and Contract Visibility
- Spare Parts/Inventory Tracking
- Task Management
- Service History
- Photo and Signature
- Inspections
- Segments

### Supplier Relationship Management

In an effort to compete in your industry, you must respond quickly to your customers' requests. In order to manage demand effectively, without having out-of-control inventory levels, you need a facility to efficiently interact with your suppliers, many of which are spread across the globe. The Supplier Relationship Management (SRM) module is fully integrated with the Quote Management, Job Management, Inventory Management, Purchase Management, and supplier Connect modules. Within SRM you can create and manage your Requests for Quotations (RFQs) effectively. Filter and sort RFQ criteria based on your specific needs to find the best match for the needed materials. The Supplier Connect module allows you to collaborate with your suppliers electronically, giving them the ability to review inventory levels, check payments, and process open POs and RFQs online. With Supplier Connect, you are able to open up a gateway for your suppliers to access important information from your Epicor for Industrial Machinery system, freeing up your procurement staff from time-consuming phone calls, faxes and e-mails. Engage with suppliers outside of the procurement process to improve internal efficiencies by collaborating together to resolve problems, answer questions and deliver new levels of responsiveness using Collaborate.





## Deliver Higher Quality Products to Your Customers

### Quality Assurance

Within the Quality Assurance module, you can access all quality functions including the scrapping of raw materials and finished goods and tracking first article inspections. Queues are available for all material needing inspection. Shop floor workers can add non-conformant parts to the inspection queues, and inspectors have full disposition and corrective action follow-up capabilities.

### Product Configuration

Many industrial equipment manufacturers sell products that can be configured or customized - for example by color, size, material, options, and much more. With products such as these, the number of possible combinations the customer could choose can rapidly rise to the thousands, or more. To help manage this complexity, Epicor

Commerce Connect includes a configurator module that provides a fast and efficient mechanism to display all product options on one page allowing your customers to simply and easily choose their own product specifications without the stress of having to navigate through multiple different pages to find the combination that best meets their needs.

Fully integrated with Commerce Connect, the Product Configurator enables Web-based configurations that can be used for quoting and pricing within the Epicor Commerce Connect solution. Once configurations are accepted by your customer, the instant flow to Kinetic not only price, but also product build to be delivered for more rapid response to new orders. Use the robust configuration capabilities and extend them to your customers and channel to ensure that customer requirements are met. Parametric capabilities enable visual confirmation of configuration results.

## Make Better Decisions with Analytics

Epicor Data Analytics (EDA) helps companies turn their data stored in Kinetic into actionable insights. EDA is an easy-to-use service in the cloud that takes a unique, intuitive approach to lead you on a journey of discovery through large cubed data sets contained in your data warehouse. With deeper insights, companies can grow by reducing cost, identifying new opportunities, supporting specific programs, and speeding up decision making.

EDA provides customizable and interactive dashboards to make it easy to analyze the data inside your business systems. The dashboards contain visual KPIs, graphs, charts, and tables, so you can quickly review important information about your business performance and make informed strategic decisions. Once you have spotted an area of interest in the visual metrics, the EDA grid is where you

conduct most of your analysis, and unlike a spreadsheet, you can “drill down” into the data with a simple click to reveal additional levels of detail—all the way down to the Kinetic transactions—and find your answers.

## Manage Projects with Confidence

To be successful in a project environment, project management must permeate every aspect of your business solution. Companies that are able to efficiently meet the demands of managing their portfolio of projects have a distinct advantage over their competition—they have a better understanding of their costs, so they can bid and win business with confidence.

Project Management is a comprehensive solution for companies that plan and execute either simple or complex projects that may require intricate, multilevel phases, as well as strict costing or complex billing methods. Embedded within the robust capabilities of Epicor, Project Management utilizes detailed estimation, planning, scheduling, costing, and supply chain logistics for complete control and analysis of any project.

## Supporting Extended and Global Operations

With competitive pressures driving many manufacturers to expand globally where labor is considerably less expensive coupled with recent trends in plant consolidations, many manufacturers today, both large and small, find themselves suddenly managing multiple sites disparately.

Epicor for Industrial Machinery offers comprehensive multisite capabilities coupled with a global presence to meet your company’s requirements for local support. Competing globally and domestically - bridging

geographic and strategic diversity and eliminating supply chain inefficiencies—can be accomplished with the technologies to streamline intra- and inter-company processes and communicate quickly and accurately. Synchronization of complex relationships which determine supply, demand, and fulfillment is the means to reaching new, industry-leading levels of business performance, all while adhering to global standards for trade of parts such as GTIN-14 and RoHS compliance. Epicor for Industrial Machinery can help you achieve maximum efficiencies across your globally extended enterprise.

## Industry Leading Service and Support

Epicor has over 45 years of experience delivering industry-focused, world-class solutions, and ongoing customer care and service to over 24,000 customer installations. It is a true global solutions partner with support offices all over the world. The key vehicle that transforms Epicor for Industrial Machinery into a successful business solution is our Signature Implementation Methodology. Epicor delivers one of the most cost-effective and efficient techniques to plan, design, validate, and deploy your Epicor solution. Staffed with direct employees around the globe who are properly trained and equipped with world-class implementation tools, Epicor follows our proven 5-stage Signature Methodology designed specifically around Epicor software and our customers. The end result is an on-time, on-budget implementation of your Epicor solution that allows your company to quickly begin using Epicor for Industrial Machinery in day-to-day operations saving you time and money by providing broad functionality at a lower total cost of ownership.

### EPICOR

We’re here for the hard-working businesses that keep the world turning. They’re the companies who make, deliver, and sell the things we all need. They trust Epicor to help them do business better. Their industries are our industries, and we understand them better than anyone. By working hand-in-hand with our customers, we get to know their business almost as well as they do. Our innovative solution sets are carefully curated to fit their needs, and built to respond flexibly to their fast-changing reality. We accelerate every customer’s ambitions, whether to grow and transform, or simply become more productive and effective. That’s what makes us the essential partners for the world’s most essential businesses.

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