

# Epicor Project Hub

**Epicor Project Hub enables customers to better manage all aspects of a project in a straight forward and navigational way, tracking project profitability from beginning to end.**

Epicor Project Hub is a real-time, cloud solution with a modern API structure. It allows distributors to manage all aspects of a large project - including bidding, bill of materials (BOM), submittal status tracking, releases and change orders, customer billing, financial summary, and vendor invoice reconciliation.

Epicor Project Hub is built with Epicor's industry expertise in conjunction with customers, for customers who manage large, complex projects that involve many moving parts and take months, even years to complete. Epicor Project Hub helps you manage bid schedules, with differing bills of materials (BOMs), quickly and easily. It's also perfect for those projects that include varying unit and lot costs/prices, hold-for-release purchase orders, and change orders.

## ***BENEFITS***

- Enables organization and management of complex, long-term projects.
- Replaces and automates paperwork used to previously manage and track multiple orders.
- Tracks total project profitability from beginning to end.
- An unlimited number of bids can be generated throughout the life of the project.
- Serves as a central location for all involved parties to be informed.
- Easy to use, navigational platform.

### Job Bidding

Epicor Project Hub allows you to associate multiple customers with a project. Since bid requests from different contractors may contain different information, you can create customer-specific bids with their unique information. Once the bids are created, you can easily send requests for quotes (RFQs) to vendors via fax or email.

For some items, you'll have unit prices while others will be lot prices. Epicor Project Hub allows you to handle both - indicating at the line-item level how the item is priced. Should you decide to unit price the entire job, an intuitive print feature allows you to generate the customer-facing quote lot priced.

To help you manage bid deadlines, Epicor Project Hub helps provide a Bid Board. Use the Bid Board to see at a glance what bids you have coming in. The system displays the bids by day and also shows the time and job that needs to be handled. From here, it's easy to send bids to customers using email, fax, or by mailing printed forms.

### Awarding Jobs

The nature of the job business is that you win some and lose some. To track that information, Epicor ProjectHub allows you to indicate which jobs have been won and which have been lost. This information - along with win information - is displayed in the Job Won/Lost Report to help you evaluate your win-to-loss ratio, as well as to determine the value and cost of the jobs that you might have lost.

For awarded jobs, Epicor Project Hub allows you to indicate the appropriate customer an any necessary information such as contact, shipping, and credit card information. After you award the job in Epicor Project Hub, you can use the Job Summary page to track and reference the overall job status, financial information, job-related transactions, job settings, and all documents for the job.

You can still negotiate costs from your vendors and sell prices with the customer and modify the BOM as necessary before generating purchase orders for the job.

### Submittals

For some projects, or for some items on a project, you might need to track and/or send a submittal document to your customer that contains details about the quantity, type, product descriptions, and manufacturers for the items on the BOM prior to purchasing any products.

Epicor Project Hub allows for the record-keeping purposes or for approval regarding the contents of the BOM prior to ordering items for the projects from your vendors. Submittals also let you attach specifications or detail sheets to the items. If you have stock products on a BOM, you can attach images and specification sheets to those products in Prophet 21® by attaching the image to the product record in the Product Maintenance.

### Direct Through Stock

Sometimes, customers will ask you to manage the inventory they own and ship it to them as needed. Epicor Project Hub offers the complete management of customer-owned inventory via the Direct Through Stock process. The customer orders and purchases stock through the standard order entry process but request that you house the material in your warehouse to be delivered later or piecemeal as their project requires.

Direct Through Stock material is ordered and billed to the customer through Prophet 21.



## Managing Purchase Orders and Releases

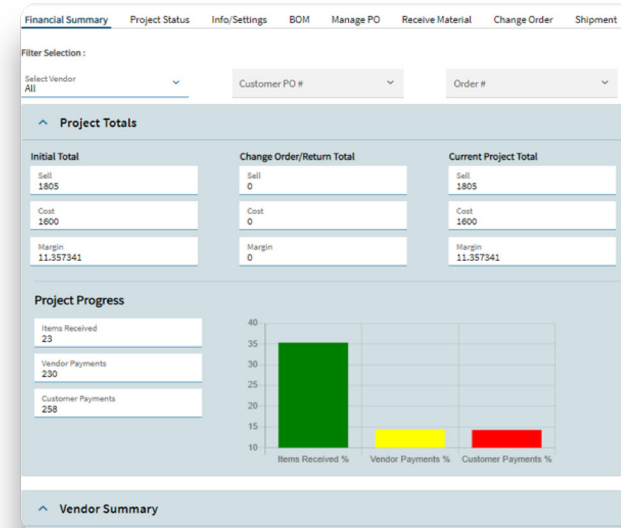
After you award a job to a customer and finalize the cost/sell information with your vendors and the customer, you can begin to create purchase orders (POs) for the items on the BOM. As you create these POs, Epicor Project Hub sends them to your vendors and creates direct orders. Each direct order created contains both the sales order for the customer and the PO for your vendor.

Since most projects don't immediately ship or ship at the same time, Epicor Project Hub allows you to create the following PO types for each vendor:

- **Reserve PO** - This reserves the order number for future use and sends the number to the vendor. Reserve POs are not required, however, your vendor might require a PO number prior to working with you regarding pricing for the job.
- **Hold for Release PO** - These tell your vendor what items you need for the job and create a direct order in Prophet 21, but they don't authorize the vendor to ship any items to your customer. As the job progresses, you authorize the vendor to send shipments of the items using Release POs. Hold for Release POs are not required unless you are creating partial releases for a job. Hold for Release POs are useful as a communication tool to tell your vendor what items you need for the job especially when you are ordering a large number of items.
- **Release POs** - These tell your vendor that they can ship items to your customer and generate a direct order in Prophet 21, based on the customer and vendor information specified for the job. If you create a Release PO for stock items, the system creates a standard sales order - not a direct order.

## Financial Summary

The Financial Summary helps provide a real-time financial picture of a project. It tracks transactions through the entire project history and reports costs and margins as the project progresses. You can use the Financial Summary to compare costs and margins on initial totals with current job totals and change orders, see a summary by vendor, see customer invoices and payments, or even see vendor invoices and payments. The Financial Summary allows you to determine if you are making or losing money on this project.





## Change Orders

Since every project will have changes, Epicor Project Hub allows you to track and process change orders.

Use Change Orders to make changes such as quantity or pricing updates to the items you are ordering from that vendor. Change Orders allow you to track material and dollar changes past the original purchase order for the project. Change Orders help provide a way to send pending or approved orders to your customers or your vendors regarding the updates to material required for the project. The Create Change Order pages enables a single place where you can see the totals associated with the changes you are making for the job and enter the updates to the quantities and prices for the items on the project. As you approve Change Orders, the system adds the orders to the Financial Summary and creates the orders in Prophet 21.

We're here for the hard-working businesses that keep the world turning. You're the companies that make, move, and sell the things we all need. Trust Epicor to help you do business better. Your industry is our industry, and we understand you better than anyone. By working hand-in-hand, we get to know your business almost as well as you do. Our innovative industry solution sets are carefully built to fit your needs and respond flexibly to your fast-changing reality. We accelerate ambitions, whether you want to grow and transform, or simply become more productive and effective. *That's what makes us the essential partner to the world's most essential businesses.*

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