

Epicor for Service Enterprises



Next Generation Software
for the Service Industry

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Introducing Epicor for Service Enterprises

Introducing Epicor for Service Enterprises an end-to-end enterprise service automation (ESA) solution from Epicor Software Corporation designed to help you win business, staff your projects, manage service engagements and streamline your financial operations. Epicor for Service Enterprises is an industry-defining ESA solution designed expressly for mid-sized service organizations. It optimizes your business processes, empowering you to expand the value chain, grow revenue and drive efficiency benefits straight to the bottom line. Epicor for Service Enterprises enables you to respond quickly to the ever-changing demands facing your service organization. It manages and automates every aspect of your business — from bid management to engagement delivery and resource management to project accounting, portfolio management and beyond — all within a single solution. With a comprehensive, groundbreaking adoption of innovative Web services technologies, Epicor for Service Enterprises is the only ESA solution to offer enterprise functionality at a midmarket total cost of ownership—combining a rich user experience with absolute flexibility and intense performance.

The Connected Enterprise Breeds Efficiency

Epicor for Service Enterprises connects every aspect of your organization through one source of knowledge. It operates as your business does, catering to the various roles in your organization with a single application rather than numerous unconnected processes. Epicor for Service Enterprises consists of several project-focused suites, each containing individual modules that connect seamlessly to share information for complete efficiency — driving cost-savings directly to the bottom line. The highly compliant service-oriented architecture (SOA) allows individual modules to be updated, customized or enhanced as needed.

Innovation Lies Within

Epicor for Service Enterprises delivers real business benefits derived from the utilization of XML Web services in an industry-defining solution for the service economy. It satisfies the market's increased demand for collaboration among customers, suppliers, contractors and employees, and provides a straightforward and expert means for

sourcing and assigning labor resources to projects. Epicor for Service Enterprises is built on Epicor Internet Component Environment (ICE), a new Microsoft .NET-based toolset for the swift development of enterprise-class Web services applications, and the foundation for the new breed of ERP solutions from Epicor. ICE provides companies with a standards-based Web services platform for cost-effective integration and interoperability — providing a significant yield on your technology investments.

An Acknowledged Leader and a Proven Solution

Today, both midmarket and multi-national service firms are faced with similar complex requirements that are found within the largest enterprises of the Fortune 500. Global deployment, distributed teams, strong operational management, and emphasis on greater customer value and business transparency demand the same robust enterprise class software solution, but one that takes into consideration the needs of more resource-constrained organizations. You cannot accept the notoriously complex systems designed for larger companies with deep pockets and longer implementation plans. You have incredibly short deployment schedules, limited resources and no room for failure. As a dedicated midmarket solution provider, Epicor designed Epicor for Service Enterprises to meet your unique needs and budget. Epicor for Service Enterprises delivers the complete solution you need to compete right across your service enterprise — but at a fraction of the cost and time.

With over 20 years of experience, Epicor provides award-winning, flexible solutions that are tailored to meet the unique needs of companies across a broad range of industries within the service sector — from high technology, software and computer services to commercial research and testing, audit and accountancy to non-profit, management consulting, advertising, PR agencies and communications to architecture, engineering and construction and more.

Epicor for Service Enterprises is an industry-specific end-to-end ESA solution for mid-sized to larger professional and embedded service businesses. Through its seven project-focused application suites it provides access to the right information, from the right source, at the right time, empowering users to add value throughout the business and to clients.

Components for Service Success

Project Suite

Project Suite helps you structure, resource, track and account for both repetitive and complex multi-year service engagements to ensure on-time, on-budget delivery — wherever you do business. Project Suite is at the heart of Epicor for Service Enterprises and delivers a single yet comprehensive view of your operations in support of greater operational visibility and all-round transparency. With sophisticated components that cover project planning and budgets, resource allocation, time and expense management, practice and scope management, contract and billing management, and WIP and revenue recognition, Project Suite offers a uniquely comprehensive services solution.

Customer Relationship Management Suite

CRM Suite is a service industry-specific solution for managing and optimizing all aspects of your company's interaction with its customers and potential customers, from generating leads to closing sales, to providing superior support that results in additional business. CRM Suite provides a 360-degree view of your customers through sales, marketing and ongoing account management functionality to help you acquire, retain and grow profitable, long-term customer relationships.

Financials Suite

Financials Suite is a proven, reliable and award-winning accounting solution that enables your organization to operate efficiently, comply with fiscal regulations, underpin strong corporate governance, and drive enterprise performance. Financials Suite streamlines the accounting function, saving time and cost while optimizing the value of your finance team with immediate access to the critical financial information you need to make decisions quickly. Most importantly, it provides the accounting controls and system security necessary to help ensure the integrity of your company's financial data.

Portal Suite

Portal Suite builds upon leading infrastructure from Microsoft- SharePoint Products and Technologies™ to provide a compelling gateway for information workers who need real-time and role-specific access to the information they need to be effective. Through a rich, collaborative feature-set, information is available to all stakeholders - from internal resources to contractors, suppliers and customers — enabling access to cross-enterprise knowledge management, project reporting and analytics, and comprehensive document management.

Business Intelligence Suite

BI Suite unlocks the meaning behind the data in Epicor for Service Enterprises, enabling more effective decision making throughout your organization. Today's service organizations rely more than ever on maintaining a comprehensive and balanced view of the entire project portfolio. BI Suite combines rich resource, project and client insight with easy to use project health and portfolio views, helping monitor performance to plan and aligning projects to goals. By identifying which projects support key initiatives, resources can then be prioritized for maximum efficiency and returns.

Supplier Relationship Management Suite

SRM Suite allows the service enterprise to source and procure resources, carry out contingent workforce planning to find the right skills, expertise and availability, and control both direct and indirect spend across the organization for tangible improvements to the bottom line.

Commerce Suite

Commerce Suite ensures that information on product and materials-related projects and operations is always on hand. With sales, purchasing, and product data management capabilities, Commerce Suite helps you achieve business goals through a comprehensive service chain solution.

Global Convergence

Epicor for Service Enterprises is distinguished by its increasingly broad focus on managing all service industry-specific processes and resources, both within and across locations, companies and global boundaries. Businesses of all sizes have recognized the value of an integrated ESA solution, rather than trying to piece together disparate applications from multiple vendors. Integrated access to system-wide information, the ability to easily add new functionality, and routine and effortless upgrades will allow you to keep pace with technology developments in the future.

Raising Technology to the Business Level

Epicor Internet Component Environment (ICE), a 100% service-oriented architecture (SOA) and application framework for a new breed of enterprise solutions fulfills the business requirements for next-generation technologies today. Epicor ICE leverages pure, granular XML Web services to provide a secure and global framework that is both highly productive and inexpensive to maintain. ICE is the foundation on which businesses execute their objectives, one that operates seamlessly and effectively in the background. It is architected to utilize Microsoft's leading platforms and technologies like the Microsoft® .NET Framework™, Microsoft SQL Server and Microsoft SharePoint™ that give a business maximum flexibility with minimum overhead. Epicor for Service Enterprises and Epicor ICE build on Epicor's tradition of offering technology solutions that yield real business benefits and clear customer advantages.

Built for the Enterprise

You face intense competition - from huge multi-nationals on one side, to aggressive smaller companies on the other. Epicor for Service Enterprises provides comprehensive end-to-end and industry-specific capabilities with advanced functionality and rapid deployment, enabling you to out-flank your competition with more effective operations and world-class service delivery. Epicor for Service Enterprises prepares your organization to compete within the new global economy that is at once demanding and rewarding. It delivers services-oriented and adaptable business architecture in support of a high growth environment and an increased need for business agility. With Epicor for Service Enterprises, and our team of consultants and resellers in your corner, you'll have the resources you need to confidently meet the challenges you face today - and tomorrow.

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Epicor for Service Enterprises

Customer Relationship Management

- eMarketing and Advanced Surveys
- Microsoft Outlook Integration
- Lead Management
- Contact and Account Management
- Opportunity and Bid Management

CRM Suite enables you to gather, organize, track and share prospect, customer, partner and service information. You can manage your account relationships and automate many administrative tasks, giving your sales, marketing, account and consulting staff more time to spend with customers. With eMarketing, Lead and Contact Management you can pinpoint your targets, capture and develop highly qualified leads. With Opportunity Management you can proactively structure comprehensive service bids, forecast bookings and revenue, and capture pre-sale costs throughout the bid process.

Supplier Relationship Management

- Contingent Workforce Management
- Service Procurement
- Sourcing

To survive in today's economy every service enterprise must put the rein on spending in every location and category. There are significant savings awaiting companies who exploit world-class applications and best practices to manage supplier relations. Service Procurement accelerates and controls the purchasing process from requisition to receipt. Contingent Workforce Management allows internal resources to bid on upcoming engagements and resource managers to source and secure subcontract labor.

Project Management

- Resource Management
- Project and Engagement Structuring
- Advanced Project Management *
- Delivery Management
- Training Course Management
- Project Accounting
- Portfolio Management
- Microsoft Outlook Integration

Resource, Project, Delivery and Portfolio Management deliver a closed loop solution for project based and service-centric organizations, offering complete visibility across all engagements within the portfolio. Find and allocate the right resources to projects, then book and approve time and expenses as they occur. Project Accounting provides a foundation for carrying out successful projects wherever you do business with comprehensive support for billing, work in progress and revenue recognition rules.

* Advanced Project Management delivers rich project planning, resource leveling and risk and issue control as a feature of the embedded Microsoft Enterprise Project Management (EPM) solution.

Commerce Management

- Sales Order Management
- Inventory and Product Data Management
- Purchasing Management
- Project Materials
- Shipping and Receiving

Commerce Order Management, Inventory Management and Purchasing provide immediate access to project materials and inventories, pricing and customer information you need to enhance customer service and improve profitability. Visibility throughout the value chain is enabled for service organizations with materials requirements, so that project commitments are clear and delivery of equipment to sites is timely. Commerce Suite energizes the service supply chain to create the differentiation you need to achieve industry leading performance.

Financials Management

- Accounts Receivable
- Accounts Payable
- General Ledger
- Cash Management
- Asset Management
- Multi-currency
- Multi-company and Consolidation

Accounts Receivable, Accounts Payable, General Ledger, Cash and Asset Management help you securely monitor and manage invoicing, payments, assets and cash in order to reduce costs and improve cash flow. Epicor for Service Enterprises Financials can help you improve your ability to increase your bottom line -- the ultimate test of your success and competitive advantage.

Extended Financial Management

- Contract Management
- Advanced Allocations
- Electronic Funds Transfer and Lockbox
- Credit and Collections
- Document Management
- Payroll and Human Resources

Contract Management provides a robust solution for organizations that need to manage renewals as well as regularly defer revenue based on terms of delivery, billing, or length of contract. With Enterprise Lockbox and EFT your cash flow position can be enhanced further by increasing the velocity of converting receipts to available cash or by reducing the administrative overhead of check payments. Credit and Collections provides a one-stop solution for aged debts and helps reduce days sales outstanding, while Advanced Allocations automatically computes cost allocations and journal calculations, streamlining processes, shortening closing cycles and improving accuracy. Enterprise Document Management, Payroll and HRMS offering round out the extended financials.

Technology Foundation

Enterprise Performance Management

- Decision Data Warehouse
- FRx Financial Reporting
- Active Planner
- Explorer and Explorer AI

Enterprise Information Portal

- Customer Content
- Supplier Content
- Service Content
- Employee Content
- Portal Server

Technology Foundation

- Microsoft.NET Framework
- Service-Oriented Architecture
- Web Services
- Back Office Integration Hub
- Business Process Management
- Optimized for the Microsoft platform

Business Intelligence

Active Planner, Decision Store and Explorer equip you to proactively analyze business conditions, monitor performance to plan and align initiatives to company goals. Heavy emphasis is placed on the active use of the right information at the right time and for the right people to guide and re-adjust the course of the business rather than just passively measuring its progress. With Epicor for Service Enterprises' analytics you can revolutionize your operational and financial reporting and analysis process. With its intuitive design, you can measure the overall health of your organization more efficiently and more often, meaning improved practice performance, increased productivity, quicker decision making and a direct impact to your bottom line.

Portal

Portal Suite* allows you to take advantage of the Internet for faster and reliable, real-time communication as well as stronger and more transparent collaboration between information workers. Customer and Supplier Content capabilities provide rich account and role-based access to essential business information for your clients and partners. Employee Content delivers a range of powerful ad-hoc query and analysis tools coupled with document and content management to ensure your company's most valuable asset, its information is easy to access and always available.

*Portal Suite builds upon Microsoft SharePoint Products and Technologies to deliver unprecedented ease of use and collaboration facilities.