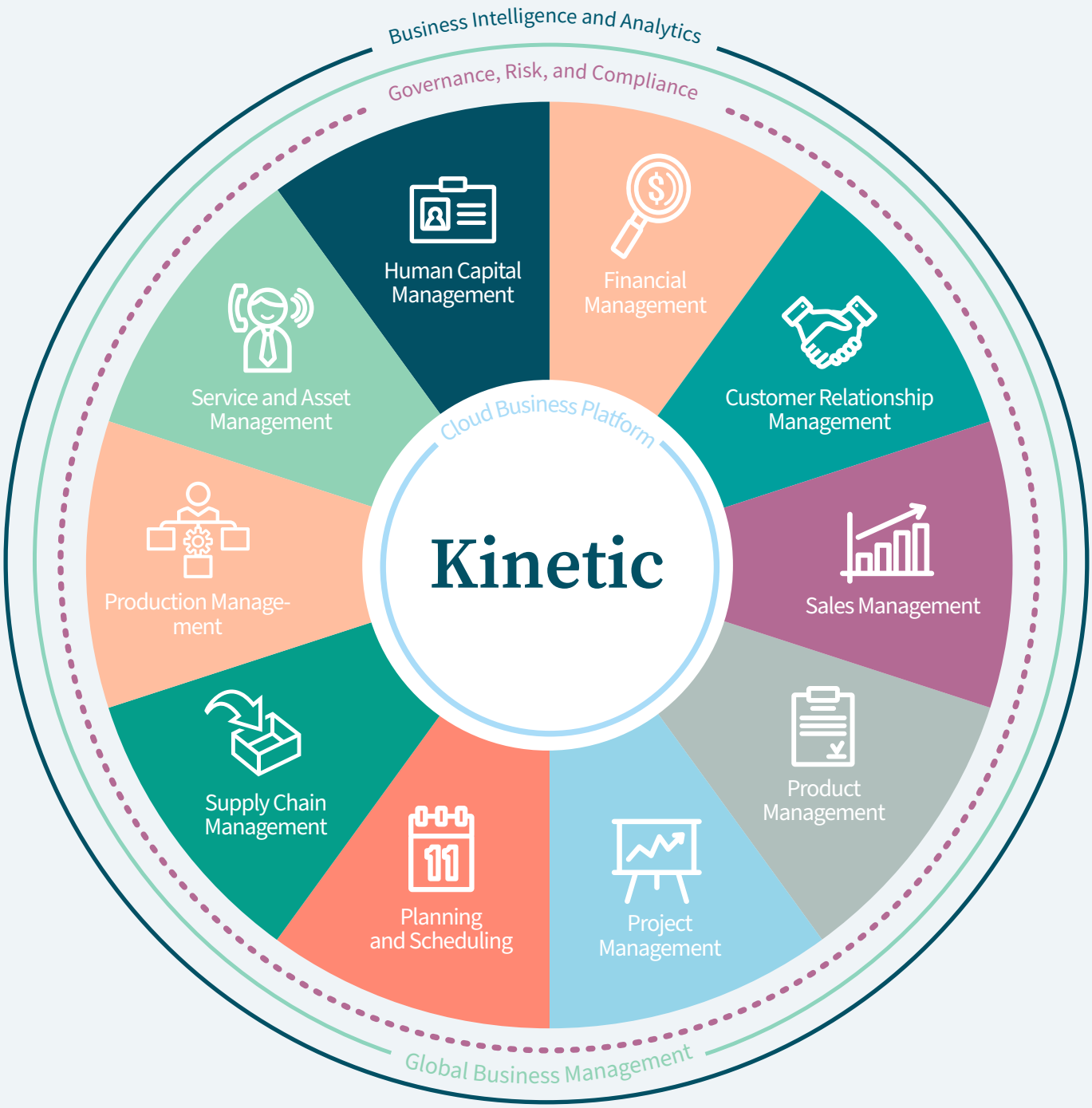
EPICOR

Project Management


Business Intelligence and Analytics
Governance, Risk, and Compliance
Human Capital Management
Financial Management
Customer Relationship Management
Sales Management
Product Management
Project Management
Planning and Scheduling
Supply Chain Management
Production Manage-ment
Service and Asset Management
Cloud Business Platform
Kinetic
Global Business Management

Human Capital Management

- Core HR
- Global HR
- Candidate Self-Service
- Employee Self-Service
- Talent Management
- Training and Development
- Position Control
- Timesheets

Service and Asset Management

- Service Management
- Returned Material Authorization
- Service Contract and Warranty Management
- Case Management
- Maintenance Management
- Field Service Management

Production Management

- Job Management
- Advanced Production
- Kanban Lean Production
- Data Collection
- Advanced MES
- Quality Assurance
- Quality Management System

Supply Chain Management

- Purchase Management
- Supplier Relationship Management
- Supplier Portal
- Inventory Management
- Advanced Material Management
- Advanced Unit of Measure
- Shipping and Receiving
- Quick Ship
- Warehouse Management
- Supplier EDI and B2B Integration

Planning and Scheduling

- Forecasting
- Master Production Scheduling
- Smart Demand Planning
- Material Requirements Planning
- Scheduling and Resource Management
- Advanced Planning and Scheduling
- Infinite, Finite, and Constraint-Based Scheduling

Financial Management

- Global Engines
- General Ledger
- Accounts Receivable
- Accounts Payable
- Tax Automation
- Financial Planning and Analysis
- Financial Reporting
- Credit Card Payments
- Cash Management
- Credit and Collections
- Asset Management

Customer Relationship Management

- Contact Management
- Marketing Management
- Lead and Opportunity Management
- Case Management
- CRM Mobile
- Integration to Salesforce.com®

Sales Management

- Estimate and Quote Management
- Order Management
- Sales Order Automation
- EDI/Demand Management-Point of Sale
- Commerce Connect
- Dealer Network Portal
- Configure Price Quote

Product Management

- Bill of Materials
- Routings
- Engineering Change and Revision Control
- Document Management
- CAD Integration
- Product Lifecycle Management
- Product Costing
- Product Configuration

Project Management

- Project Planning and Analysis
- Project Generation
- Project Billing
- Resource Management
- Contract Management
- Planning Contract
- Time Management
- Expense Management
- Advanced Project Management

Governance, Risk, and Compliance

- Corporate Governance
- Risk Management
- Security Management
- Business Process Management
- Global Trade Compliance
- Electronic Reports Engine
- Environmental and Energy Management

Business Intelligence and Analytics

- Operational Reports/Dashboards/IoT/OEE
- Descriptive Analytics (Business and Financial User Reporting/Dashboards)
- Diagnostic Analytics (Scorecards/KPIs, Financial Planning)
- Predictive Analytics (Forecasting)
- Data Warehousing
- Role-Based Analytics and Business Intelligence
- Mobile Business Intelligence

Cloud Business Platform

- Mobile, Browser-based Experience
- Virtual Agent
- Collaborate
- Enterprise Search
- Epicor Learning
- Business Process Management
- Enterprise Content Management
- Business Workflow Automation
- IoT and IIoT Applications
- eCommerce Platform
- EDI and B2B Integration
- Electronic Reports Engine
- Application Studio Configuration
- REST Services and Epicor Functions
- Updatable Dashboards
- Epicor Integration Cloud
- Deployment Flexibility
- Microsoft Azure Cloud
- Security Management

Global Business Management

- Multicompany Management
- Multicurrency Management
- Global Multisite Management
- Multilingual Data Management
- Master Data Management
- Scalable, Distributed Deployment
- Global Engines

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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.

Resource Management provides a detailed representation of resource capabilities and availability. Time and Expense Management and Approval help ensure projects reflect accurate costs, and the comprehensive Billing and Revenue Recognition functionality guarantees compliance with contract requirements and accounting standards. At all times and throughout the entire process, embedded Project Analysis and reporting—combined with Business Process Management (BPM)—provides accurate and up-to-date status information and meaningful alerts.

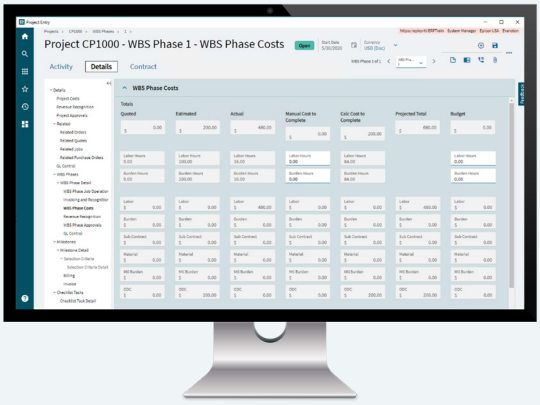
Project Planning and Analysis

Supporting the needs of industries with a project orientation, Project Management provides flexible Work Breakdown Structure (WBS) capabilities—including multilevel phases within a project. Fully embedded within Kinetic, Project Management offers the robust scheduling engine for complete visibility and management of the project schedule. The Project Management module also includes the ability to accumulate and roll up costs for a WBS Phase to the main project— supporting budgets, estimated completion values, and calculated, estimated, and actual costs accumulated at the WBS Phase or project level. For complete visibility, all costs are rolled up through the project structure, with added analysis capabilities offering cross-project scrutiny of material class, burden, or labor type.

Project Generation

Define all project components as part of a logical, cohesive plan. A project can be generated at any time—including at the quote, sales order, or after the contract has been signed with the customer. Define the default project approvals method and workflow group.

Define the work breakdown structure for the project. Automatically create jobs for the collection of costs and management of operations, and define the hierarchy for phase cost accumulation. Define multiple operations, their sequence, defined resource roles, and planned hours as required against each phase job. Optionally define workflow and approvals overrides at the phase level. Create a library of template project WBS structures to represent the various methodologies or requirements of recurring projects. Project structure and contract details can be manipulated in duplicated projects to reflect any nuances on a particular engagement. Bidirectional integration with Microsoft® Project® gives project managers an additional tool to use to easily manipulate the schedule and simplify the planning of any project.



Project Planning and Analysis—Effectively manage the project work breakdown structure no matter how complex. Ease the burden on project managers by providing access to everything relating to the project in a single place.

Collaborative Project Management

Collaborate with Project Management gives the internal and external project community visibility into the events of the project—as they happen. This allows teams to achieve transparency regarding project progress and status and enables smarter and more efficient collaboration.

Collaborate provides access to those involved with your projects to subscribe, follow, and trend what matters most to the team. Rather than relying on the team alone, why not leverage the full expertise of an organization. Using MS Teams integration, project teams become collaborative entities— embedded in multiple networks both internal and external to the organization. Each member of the team has unique connections inside and outside the organization.

Collaborate allows the project team to tap into social networks for expertise and improved access to knowledge to complete their goals. It allows a project manager to see the social network of their team and leverage those connections to better collaborate with the greater project community.

Contract Management

Maintain the contractual arrangements for a particular project with Contract Management. Record details of the customer together with key contract dates, values, currency definitions, project manager, and the appropriate revenue recognition method. Define source of costs rates to be applied to the project contract—hierarchical, project, employee, or role. Configuration settings can be used to help ensure that only resources with the specific role codes defined in the project contract are able to work and record time against a project. This can be extended to record the specific resources that are approved to work on a particular project contract. Invoice ceilings can be established to limit the amount billed for a particular role code, resource, or supplier. The contract defines the system behavior when such ceilings are met—either continue or cease invoicing for the defined resource. Epicor BPM can be used to monitor as ceilings are approached. To cater for the needs of certain industries— notably contracts dealing with the U.S. Department of Defense—Burden Sets and the sequence in which they are applied may be maintained and defined against the project contract.

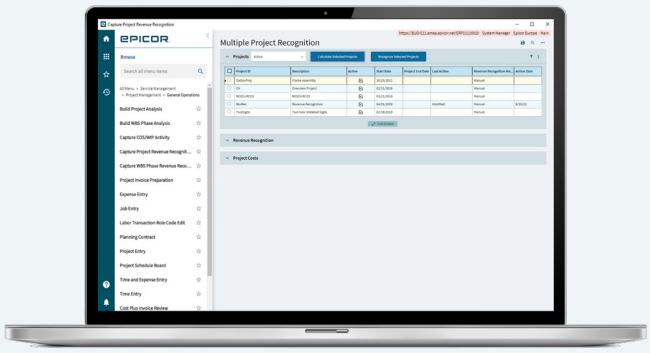
Planning Contract

You can associate a planning contract with one or more projects. New sales orders, purchase orders or jobs linked to a project will inherit the Contract ID. This supports the ability to link demand and supply to the project. The demand linked to a planning contract is filled by the supplies linked to the same planning contract. As a result, the demand is fulfilled specifically from assigned Contract warehouse/ bin locations, excluding other non-planning contract warehouses/bins from the fulfillment process. You can link demand to a project, job or sales order indicating where the demand will be consumed.

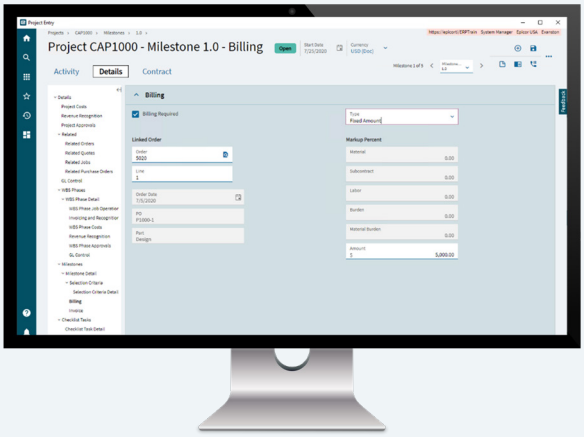
Revenue Recognition and Analysis

Use the Revenue Recognition Workbench to automate revenue recognition and process the various milestones and contractually defined billing points on a project. You can generate journals for revenue recognition based on the costs produced from the Project Analysis during the life of the project. The journals can be reversed once the project is completed. Easily perform revenue analysis for progress or milestone billing.

Kinetic allows you to process the revenue recognition for multiple projects at the same time, saving time for Project Managers and finance experts working on multiple projects, as it improves efficiency, and it also helps to eliminate tedious manual work for each project in Kinetic.



From the Multiple Project Recognition Dashboard, you can monitor all your projects simultaneously and you can also run the Project Analysis, or the Revenue Recognition programs for multiple projects at the same time.



Project Billing—Comprehensive contract management provides a range of invoicing options to cater for any billing situations.

Project Billing

Project Management allows you to generate progress and milestone billing, so you can invoice your customer and optionally defer the revenue and cost of sale—recognizing them at various stages in the project.

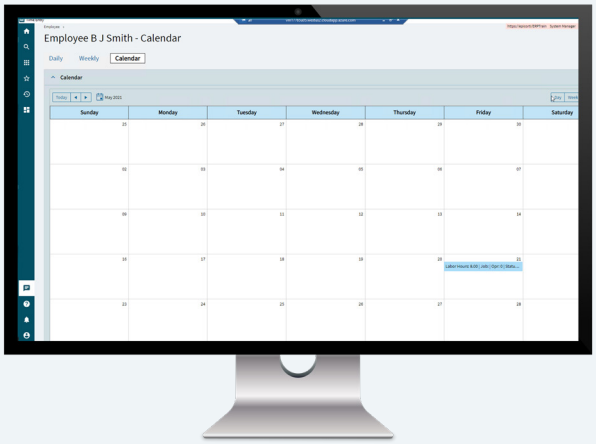
Invoices can be generated based on a fixed date, fixed amount, user-defined stage of project completion, or user-defined cost-to- date. More complex contract arrangements can be defined using the sophisticated options available in Epicor Project Billing.

The advanced invoicing methods available in Epicor Project Billing provide the capability required to handle the commercial terms negotiated during the project bid process. This flexibility enables project managers to focus

on managing project delivery in the most efficient way while also handling accurate billing in accordance with a customer-defined schedule—including comprehensive contract management, multiple invoicing methods, time and materials billing, milestone billing, and more.

Resource Management

Epicor Resource Management provides the ability to define all resources available— whether they are employees, contractors, equipment, or machinery. Comprehensive calendars, resource capabilities, roles, and capacities can be defined, which are then referenced throughout Kinetic. Resource Management additionally provides the comprehensive costing and default burden and billing data used throughout the application—from planning and scheduling to labor bookings. Contractual role requirements and a clear separation of direct and indirect labor are supported in accordance with the specifications of the most demanding contract requirements.



Time Management—The calendar provides clear visibility of missing time sheets entries. The colored blocks indicate the approval status of each time transaction.

Time Management

Time Management in Kinetic provides a highly configurable environment for the recording and management of time across projects, jobs, service orders, and internal codes. A range of entry options are available, each reflecting the nature of a particular transaction. Time can be entered via web browser when employees are on the go, on the shopfloor, or in the office—resulting in quick and accurate recording. Time recording reliability is reinforced through an array of task-centric entry options, which focus on the critical data required in each context. Additional configuration options help ensure that users only have access to authorized jobs and booking codes, with a clear separation between direct and indirect labor entry. Additionally, the flexible approvals process provides the security to help ensure that transactions are properly authorized and backed up by a comprehensive audit trail.

Expense Management

Expense Management in Kinetic helps eliminate administrative effort and increase efficiency by providing a secure environment for recording and managing multicurrency expenses across projects, jobs, and service orders, as well as purely internal expenses. The flexible approval process of Expense Management also provides the security to help ensure expenses are properly authorized and backed up by a comprehensive audit trail, with approved transactions flowing directly into Accounts Payable for fast, efficient processing and reimbursement. Expenses can be entered on mobile devices via web browser when employees are on the go.

Time and Expense Management Mobile Applications

Time and money are two key aspects that impact your business profitability. You need to help ensure you make proper payments to your employees or subcontractors and accurate billing to your customers. Manual time and expense reporting processes can be time consuming and often result in inaccurate data.

The Time and Expense mobile applications are available for both iOS and Android devices. Simply download them from your app store, and with minimal setup, you will be up and running in no time.

With Time and Expense Management Mobile Applications, you get full control and visibility to make better decisions. Sync back the data in real time to Kinetic, as the applications are an extension of the system. Data flows seamlessly between the different modules like Financials, Project Management into the mobile applications. They don't need a separate license, as they are accessed through the Time and Expense Management licenses.

Provide your project managers and their teams, sales personnel, field service technicians, and frequent travelers with modern and intuitive applications to enter, track, and approve time and expenses anytime from their mobile device.

Create, view and edit expenses or time records when you're offline. These records are saved as drafts in the offline storage, and once your Internet connection is restored, the apps automatically synchronize and submit the changes to Kinetic.

The built-in dynamic dimensions functionality in the General Ledger Chart of Accounts setup links all approved and posted time and expense transactions to codes such as projects, cost centers, sales territories, salespersons, customers, product lines, and more.

Advanced Project Management

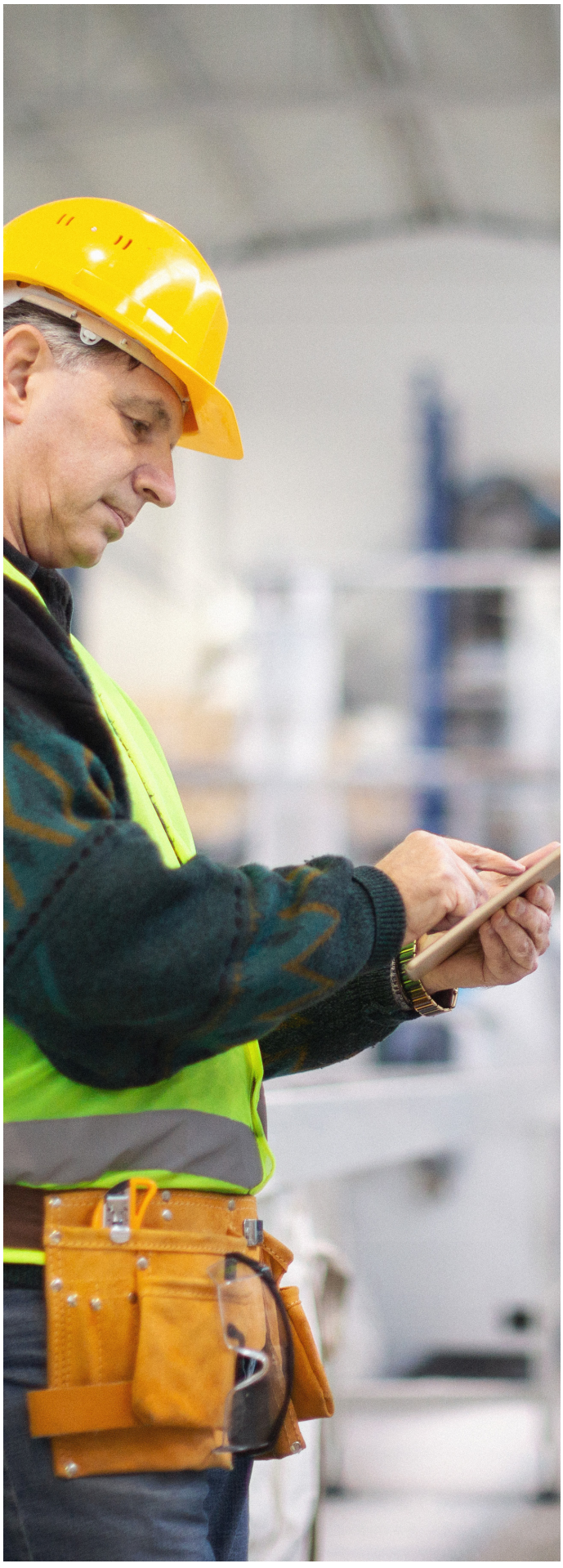
Advanced Project Management extends the functionality and flexibility of the Project Management module. It helps address the challenges of contract management and multifaceted projects with an integrated solution that provides complete functionality to manage projects, contracts, claims, subcontractors, variations, and revenue recognition. Generate efficiencies in your business, improve cash flow and forecasting through effective management, and eliminate manual entries from your revenue recognition process to keep mistakes to a minimum.

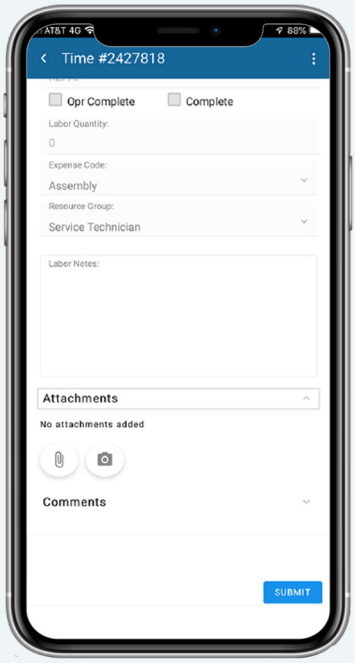
The Epicor Advanced Project Management Suite has three modules that can be used individually or together depending on your business' needs:

- Advanced Project Accounting: Manages the financial viability of the projects. Includes Cost Codes, Project Analysis, Project Ledger, and Project Accruals functionality.

- Advanced Contract Management: Manages the financial relationship between the business and the customers. Features include Contract Order Maintenance, Tendering Process/Bid Management, Multiple Billing Types under one contract, Progress Claims and Applications for Payment.

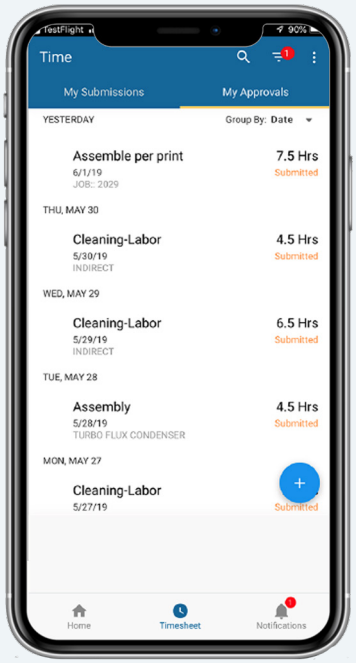
- Advanced Subcontract Management: Manages complex contractual arrangements with subcontractors. Features include Subcontract Order Management, Progress Claims and Applications for Payments and Reports like Subcontractor Commitments, Progress, and Retentions.

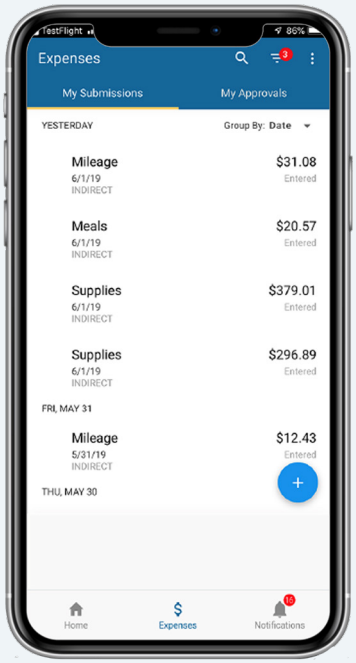




Go paperless by uploading photos and other attachments to the entries.

Take control of your expenses on the go.





Approvers can see and act on all submitted requests.

Track time and expense anytime from your mobile device.

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.

Contact Us Today: info@epicor.com | www.epicor.com

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