

# Epicor

# Prophet 21 for

## Industrial Distributors

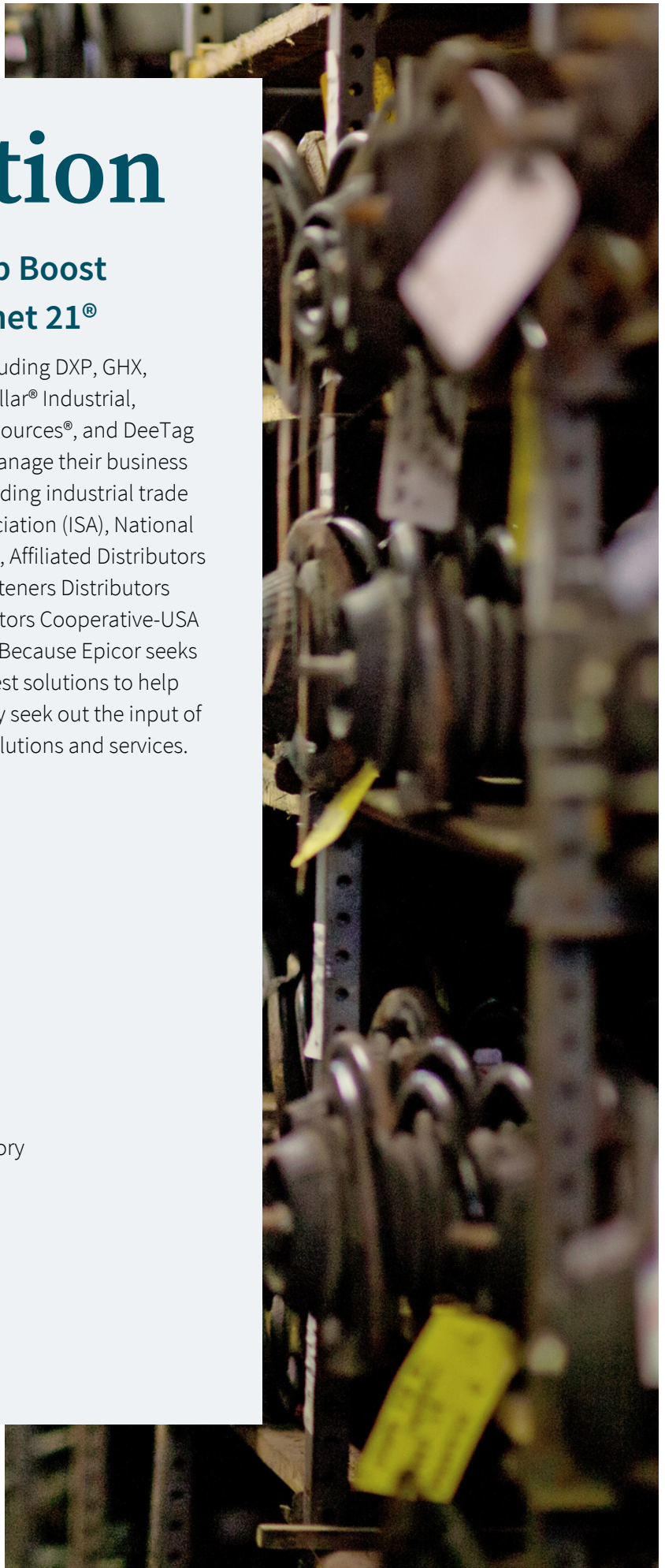
# Introduction

## Industrial Distributors Help Boost Growth With Epicor® Prophet 21®

Today's leading industrial distributors—including DXP, GHX, United Central Industrial Supply®, Eriks, Stellar® Industrial, Duncan-Parnell Inc.®, Abatix®, GS Global Resources®, and DeeTag Ltd.—trust Epicor Prophet 21 Software to manage their business efficiently. Epicor is an active member of leading industrial trade associations such as Industrial Supply Association (ISA), National Association of Wholesale Distributors (NAW), Affiliated Distributors (AD), NetPlus Alliance, Specialty Tools & Fasteners Distributors Association (STAFDA), Independent Distributors Cooperative-USA (IDC-USA), and Evergreen Marketing Group. Because Epicor seeks to provide industrial distributors with the best solutions to help them meet their business goals, we regularly seek out the input of our customers in the development of our solutions and services.

### Functionality

- Quotes and orders
- Front counter
- Scheduled orders
- Order history/previous requests
- Customer-specific pricing
- Contract pricing
- Document links
- Accessory and substitute items
- Manufacturer's rep orders
- Customer-and vendor-managed inventory
- Crib integration
- Vendor pricing updates
- Rebate management
- Lot tracking
- Serial number tracking
- Service and maintenance





### In Your Industry

As an industrial distributor, your business processes are unique, and you need a business system that can help solve the challenges you face on a daily basis—whether customers are coming to your counter for MRO parts or safety products, your warehouse staff is pulling a replenishment order to restock a customer consignment location, or you are trying to get a last minute repair part overnighted via FedEx® or UPS® to a customer whose plant is down. You also need to accept EDI orders from customers and allow others to place orders and manage their account online. Additionally, you need tools to allow your staff—especially sales—to work remotely via a tablet or phone. At the end of the day, you need an industry-leading, fit-for-purpose system that’s designed around your needs.

### A Comprehensive Solution

With more than a half-century of distribution experience, Epicor helps distributors grow sales, improve margins, and increase

productivity with enterprise resource planning (ERP) systems that keep them healthy and thriving in today’s highly-competitive marketplace. Epicor Prophet 21 Software is a leading ERP solution for industrial distributors. Prophet 21 Software combines proven distribution expertise with an end-to-end, web-enabled infrastructure and modern technology stack. Cloud and on-premises deployment options are available, so you can start with the on-premises version and easily migrate to the cloud as your needs change.

Prophet 21 Software enables your most critical business areas to work more efficiently, including:

- Customer Relationship Management
- Order Management
- eCommerce
- Inventory Management and Purchasing
- Wireless Warehouse Management System
- Finance and Accounting
- Manufacturing
- Service and Maintenance
- Business Intelligence
- Enterprise Content Management

As an industrial distributor, you need a technology provider who understands your needs. You must also choose a business partner with wide-ranging industry expertise and a vision to help guide you into the future. Epicor offers both. When you partner with Epicor, you can expect only the best in technology solutions and professional services, as well as the industry-specific functionality you need to drive your business. Epicor understands your industry and can help make your business better.

### Quotes and orders

Your order management processes directly affect your customers and how they view your business. Customers demand faster, better service and will go elsewhere if you can’t meet their needs.

Prophet 21 Software enables you to complete the entire order entry process from one screen, including:

- Enter quotes and orders
- Convert quotes to orders
- Check stock
- Expedite orders
- Search price and availability requests



- View past invoices
- Verify shipping preferences

Whether orders are entered at the counter, remotely via a mobile computing device or laptop, or over the web, information goes directly into your Prophet 21 Software solution for faster processing—eliminating rekeying errors.

### Front counter

Whether you have a small counter or a large customer self-service area, you'll need point of sale (POS) and front counter capabilities. Prophet 21 Software has the tools necessary to quickly and efficiently handle that early morning rush. You can help any customer on the spot by accessing your inventory from the Order Entry screen. You can also offer a price, place the order, and then accept payment or record the transaction for invoicing.

To speed the order entry process, your staff can manually enter items or scan them using a wireless or USB barcode scanner. Check customer credit on the fly, and send instant notifications of exceptions to the credit manager. Workers can also enter payments on the transaction—accept cash, check, or credit card. The Epicor integrated credit card processing solution\* enables you to accept customer payments with credit or debit cards and receive immediate authorization. You can avoid the inefficiency and inaccuracy of separate terminals while simultaneously simplifying and lowering your costs to comply with the payment card industry (PCI) security standards.

Having proof of pick-up—such as the signature of the person who completes the pick-up on the

invoice—can prevent messy disputes and expedite payment.

Front Counter Signature Capture uses a simple, easy-to-install capture device that integrates with the Prophet 21 software Order Entry module to instantly provide you with a permanent record of what left the warehouse, when, and with whom.

### Scheduled orders

Customers sometimes place orders that will ship over time. Delivery dates could vary from item to item or even within an item—requiring distributors to ship specific items or quantities on specific dates. Many distributors enter these as separate orders or track these orders outside their system in spreadsheets or on paper. Prophet 21 Software allows distributors to handle these types of orders directly in Order Entry.

Prophet 21 Software Order Entry allows you to manage release dates at both the order and line level. Multiple releases can be scheduled for the same order and can be entered using a specific date or using a rule. For instance, 12 releases, once a month, and starting on a specific date. Default settings allow you to determine when the order is expedited and picked.

Prophet 21 Software also helps manage inventory allocations for scheduled orders. Instead of immediately allocating material on a schedule order, Prophet 21 Software uses lean principles to allocate the material “just in time.” The calculation begins with the expedite date, then—using the next schedule review (purchase) date, the safety stock days, the lead time, and the lead time safety factor—Prophet 21 Software allocates the material “just in time.”

### Order history/previous requests

How often do you deal with customers who ask for the same item they purchased in the past? When you ask for more specific information, do they only remember a portion of the item information, the quantity, or the date they bought it? Prophet 21 Software includes a previous request search, allowing you to search through the customer's sales history. You can narrow your sales history search by date range or keywords and—in a few simple steps—add that item to the customer's current order. This saves time and eliminates trips to the file cabinet to thumb through customer invoices.



### Customer-specific pricing

You can probably count on your core customers to order certain products from your company on a regular basis. It makes sense for you to reward frequent customers and encourage return business by offering special pricing. When a manufacturer offers you a price break, you may often want to pass those savings on to your customers.

Prophet 21 Software gives you the flexibility to set prices as you see fit—including offering select customers preferred pricing, offering pricing based on quantity breaks, and setting promotional pricing—ensuring you maintain your margins while meeting customer and competitive demands. You can even set start and end pricing dates on a customer, product, or product group basis to meet contractual obligations or for limited-time specials.

### Contract pricing

For many customers, you'll need to negotiate pricing down to the item level—establishing fixed, time-based net prices on a SKU-by-SKU basis. Prophet 21 Software

enables you to set up time-sensitive contract pricing for these customers. Contract pricing is fully integrated in Quote/Order Entry to help ensure the customer gets the right contract price on each transaction. Additionally, starting and ending dates on contracts allow you to track when contracts are expiring and set up contracts that will automatically kick in on the starting date.

### Document links

Epicor Prophet 21 Software offers a cost-effective, reliable alternative to keeping space-consuming file cabinets full of paperwork in the office, and it eliminates the need to walk back and forth between desks and file cabinets to retrieve that paperwork. By giving you the ability to scan paper documents and link them to records within the solution, Prophet 21 Software helps boost employee efficiency while cutting the time and expenses associated with maintaining traditional paperwork.

Prophet 21 Software document links allow you to link maintenance and transaction records to any file on

your network—from vendor invoices and customer purchase orders, to specifications and material safety data sheets (MSDS). You can even scan and save handwritten letters and faxed communications in the solution or link to emails that relate to specific orders. Because your employees will have better access to important customer and product information, service will also improve. In addition, because they can email or fax the documentation directly from Prophet 21 Software, your employees can simply click on a link to those documents and send them instantly.

### Accessory and substitute items

With the built-in ability to suggest accessory items and substitutions, you will grow your margins and make even your most inexperienced sales people sound like seasoned pros. Does every one of your sales and service representatives know—or remember—to offer “go-with” items? Prophet 21 Software solves this issue by automatically “suggesting” products that go with items on a customer's order—helping to increase sales and improve customer satisfaction.



In addition, Prophet 21 Software automates substitution processes. For example, if one of your most popular SKUs is backordered, the solution will remind your sales representatives to offer a similar—or identical— product. This feature helps ensure that you will never turn customers away because products are out of stock.

### **Manufacturer's rep orders**

Whether you call it an “order,” an “agent order,” a “commission order,” or a “manufacturer rep order,” any order where you act as the sales representative for a certain manufacturer, supplier, or vendor requires special treatment. Since these orders are billed and filled by the manufacturer, processed without creating a customer receivable, and paid as a commission from the manufacturer, they cannot be treated as a normal order. The manufacturer's representative functionality in Epicor Prophet 21 Software manages such orders by providing you with the features necessary to separate manufacturer rep orders from normal orders while tracking how they impact your bottom line and business processes.

Once enabled in your order processing system settings, manufacturer rep order entry simplifies billing rep orders by allowing you to enter line items as you would for a typical sales order. However, since rep orders are a non-inventory process, Prophet 21 Software will not allocate any quantities from inventory and will print manufacturer rep order forms in place of pick tickets, packing lists, and invoices.

### **Customer/vendor managed inventory**

Many distributors now offer to manage storerooms and stock bins and determine usage for their customers. This service is gaining momentum as one of the most important value-added services a distributor can offer its customers. If performed manually, this process can be incredibly tedious, time-consuming, and inaccurate. However, with the right tools, it can lead to increased sales, better inventory control, and satisfied customers.

Prophet 21 Software allows you to manage any customer's inventory through either consignment—when you keep your stock in their warehouses—or bin management—when you regularly replenish SKUs at their locations. You can schedule blanket releases, track what inventory is with which customer, and monitor usage trends to determine how much stock you need to carry to satisfy needs. Cycle counting features can confirm that inventory counts are accurate—both at your company and at customer locations—and lot and serial number tracking permits you to track stock and help ensure well-organized inventory rotations. With the scalability and flexibility of your Prophet 21 Software system, you will have the capability to manage numerous customers' stockrooms.

### **Crib integration**

Epicor Prophet 21 Software also provides the ability to integrate with tool cribs or vending machines at customer sites. Tool cribs allow your customers easy access to inventory and can be automated to pass information



about usage back to Prophet 21 Software without the need for a salesperson to make an onsite visit.

### **Vendor pricing updates**

Let your service representatives focus on proactive tasks— not data entry. With an open database and unparalleled connectivity, it is easy to upload manufacturer price lists and data sheets. Plus, the solution can automatically convert metric measurements into inches and feet after you upload data from overseas manufacturers—simplifying the process of importing product and reducing the chance of errors.

### **Rebate management**

Many top vendors offer rebates that help distributors maximize profits. Robust rebate functionality helps you manage these rebates and helps ensure you have the functionality you need to take advantage of anything your manufacturers might offer. You can track vendor rebates electronically, resulting in more accurate books and a healthier

bottom line. Simplify the often-tedious task of handling vendor rebates by completely automating the process. Each step—from negotiation, to receipt, and beyond—is recorded in real time and reflected in your solution’s General Ledger and price schedules. This helps ensure you never lose track of a rebate you earned and lets sales and order entry staff always see proper gross margins to offer customers appropriate pricing. Additionally, your accounting staff will benefit from the ability to produce detailed, easy-to-understand rebate reports and—more importantly—the accurate, concise information you need to send to vendors to claim your rebates.

### **Lot tracking**

Tracing item lots from origin through final shipment is a critical task many distributors must manage each day. Customers often demand to know when, where, by whom, and to what specifications a product was made—and want you

to provide documentation detailing each step of any process. Without the right tools and technology, managing these processes can easily overwhelm even the most organized businessperson. Fortunately, Epicor Prophet 21 Software simplifies lot tracking by making it easy for distributors to manage the most complex products and processes.

Prophet 21 Software allows you to assign limitless attributes to each lot, enabling you to determine exactly which data you associate with each item. Many distributors might also need to keep information about a product’s genealogy from manufacturers and suppliers. Prophet 21 Software makes it easy to record this type of information.

Some customers—like those in the aerospace, automotive, and medical device industries—may require that you send specifications and/or certifications related to the lot they purchase, while others may not want such detailed information.

Prophet 21 Software lets you customize records to match customers' documentation needs and will automatically print, fax, or email the information with packing slips, invoices, or other pieces of correspondence.

### Serial number tracking

Important for recalls and record-keeping purposes, tracking serial numbers can be a big part of your business. Prophet 21 Software allows you to record the serial numbers on any item in your warehouse and offers flexibility in how you track this information. You can choose to record item serial numbers for both inbound and outbound transactions. This gives you full visibility of serial numbers through every step in the process. Optionally, you can choose to only track serial numbers on outbound transactions—eliminating the need to enter this information during receiving.

### Service and maintenance

To help distributors automate the service and maintenance process and more quickly and effectively meet their customers' needs, Epicor developed the Service and Maintenance module for Epicor Prophet 21 Software. This module allows users to enter and process service quotes and orders at all phases of a service transaction. You can order and replenish parts directly from your existing inventory, set up labor and technicians to manage work performed, track full sales and service history for all serial numbers, and minimize data entry through an automated process.

Warranty information and preventative maintenance schedules can also be set up at the item level. Warranty records note expiration dates for given serial numbers, as well as coverage details down to the individual part and

labor level. When processed on a service order, customer pricing is set based on coverage rules by the warranty, and warranty claims can be generated to manufacturers for reimbursement. Similarly, if you or the manufacturer recommends preventative maintenance, Prophet 21 Software can automate the reminder process and facilitate creation of service orders against preventative maintenance schedules.

Once a service order is entered, the dispatcher can schedule the service by viewing a graphical display of technicians' availabilities and dragging and dropping specific labor tasks into an open time slot—which will automatically create start and end times for the technicians to complete the associated labor.

## Technology That Enables Transformation

Today, you need a software solution that you can implement quickly without substantial cost to your organization. Epicor Prophet 21 Software is designed to help your distribution business scale, change, and grow without major system modifications.

Prophet 21 Software combines proven distribution expertise with a web enabled infrastructure and modern technology stack—including HTML5, Angular JS, .NET, and SQL Server. Cloud and on premises deployment options are available. Distributors can start with the on-premises version and migrate to the cloud as their business grows.

Learn more about how Epicor Prophet 21 Software can help you grow your distribution business by contacting Epicor today.

## 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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