**EPICOR.**
Business Inspired®

Innovation
**Inspires**
Possibilities

**Name**
**Title, Company**

**EPICOR.**
Business Inspired®
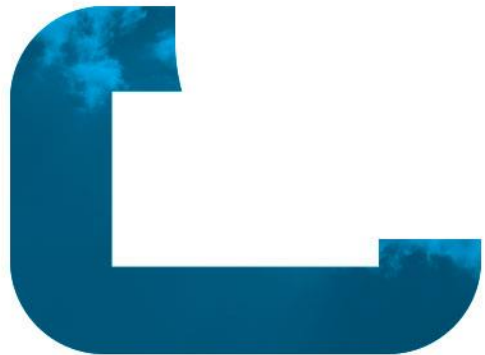
# Corporate Overview

**Name**
**Title, Company**

# Today's Discussion

| | |
|---|---|
| 8:00 am | Welcome |
| 8:10 am | Our Company |
| 8:30 am | Our Markets |
| 12:00 pm | More Topics |
| 1:00 pm | Break |
| 1:30 pm | Even More Topics |
| 2:00 pm | Wrap Up & Discussion |

EPICOR.

Business Inspired®

EPICOR.

# Company at a Glance
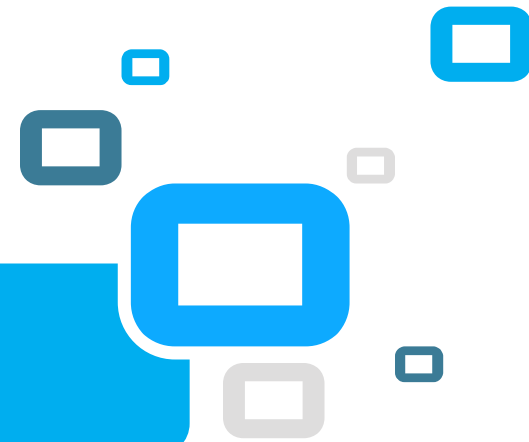
EPICOR.

# Epicor
## At a Glance

**20,000**
customers

**3,900**
employees

**150**
countries

**~$0.9 billion**
revenue

EPICOR.

# Geographic and Industry Coverage
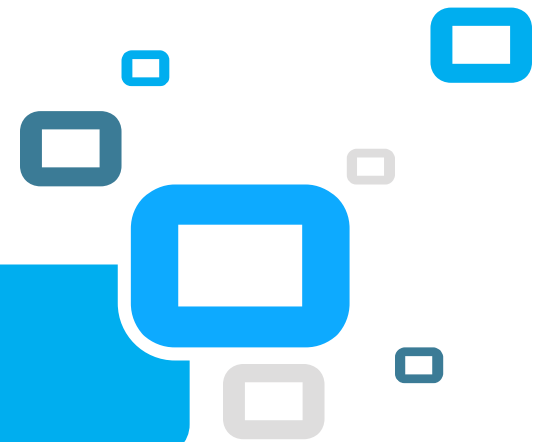
EPICOR.

# Market
**Focus**

| | Very Small | Small | Lower Mid-Market | Upper Mid-Market | Large | Very Large |
|---|---|---|---|---|---|---|
| Employees: | 1–19 | 20–99 | 100–499 | 500–999 | 1,000–2,499 | >2,500 |
| Revenue: | <$25M | $25–49M | $50–99M | $100–249M | $250–999M | >$1B |

EPICOR.

Americas **18**

**24**
Europe
Middle East
& Africa

Asia **11**

Bracknell, UK

**HQ**

Austin, TX

Monterrey, MX

**150+**
Countries

**30+** Languages

Singapore

Australia &
New Zealand **5**

Sydney

EPICOR.
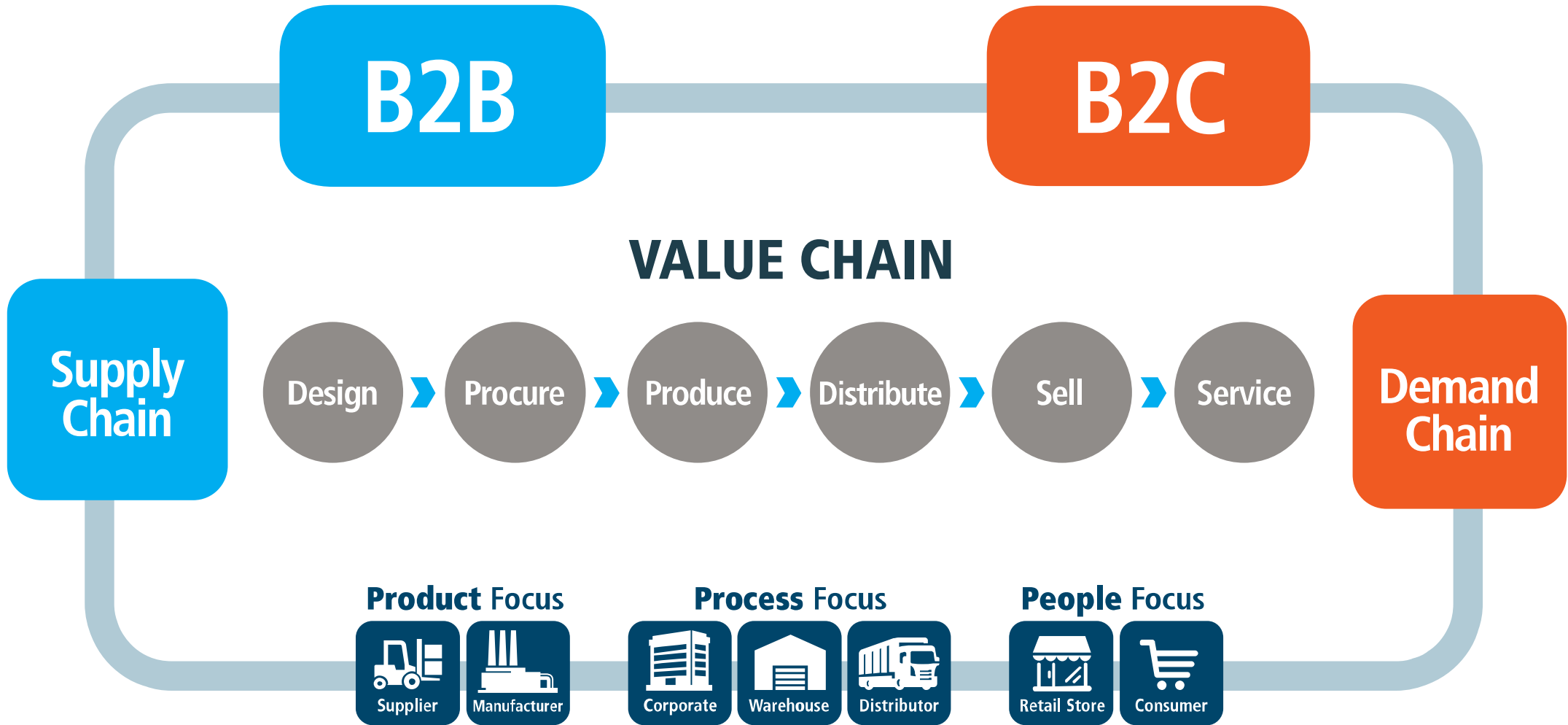
# Industry
# **Focus**

## Manufacturing

**Aerospace & Defense**

**Automotive**

**Capital Equipment**

**Electronics**

**Fabricated Metals**

**Food & Beverage**

**Industrial Machining**

**Instruments & Controls**

**Medical Device**

**Printing / Packaging**

**Pharmaceutical**

**Rubber & Plastics**

## Distribution

**3PL/Logistics Services**

**Automotive**

**CPG**

**Industrial**

**Electrical & Plumbing Supply**

**Heating & Air Conditioning**

**Medical Supply**

**Pharmaceutical**

**Value-added Distributors**

## Retail

**Farm Supply**

**General Merchandising**

**Hardware**

**Home Improvement**

**Lumber & Building Materials**

**Nurseries & Garden Centers**

**Pharmacy**

**Specialty Retailing**

## Services

**Financial Services**

**Hospitality (Food)**

**Hospitality (Property)**

**Non-Profit**

**Professional Services**

**Sports & Entertainment**

EPICOR.

# Our
# Customers

# Technology and Solutions
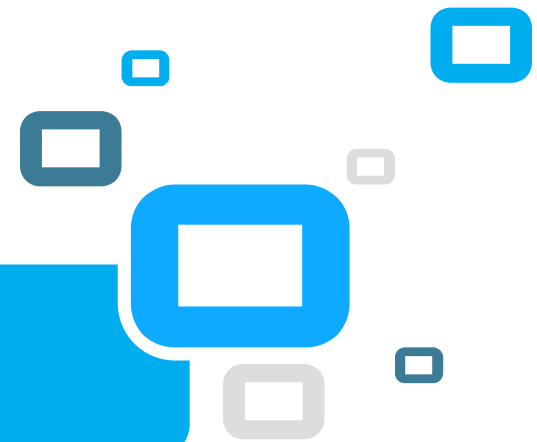
# Enabling
# Business

## Manage Global Operations

Available in all the world's major markets and industries

## Increase Employee Productivity

Access via PC, mobile devices, the Web; From Microsoft® Office

## Adapt to Change

Flexible, scalable SOA; Embedded business process management throughout

## Gain Key Insight

In-context business intelligence provides real-time analysis where you need it

EPICOR.

# Solution
## Decision Criteria

- Do I view the vendor as a trusted advisor?

- Does the solution have functionality that is built for my industry?

- Are the solutions on cutting-edge technology?

- Do I have the ability to get the professional services and customer support that my business needs?

- What is the total cost of ownership?

- How fast will I get a return on my investment?

EPICOR.

# The Solution You've
## Been Looking For

- Trusted Vendor

- Industry-Specific Functionality

- Cutting-Edge Technology

- Professional Services
  and Customer Support

- Low Total Cost of Ownership

- Quick Return on Investment

EPICOR.

# Next-Generation
## Solutions…Today

- Industry-specific, vertically focused, highly intuitive

- End-to-end functionality for better business management

- Industry leading 100% SOA based on Microsoft .NET

- Flexible deployment—On premises, hosted or in the cloud/SaaS

- Support for the virtual enterprise, multisite, multiplant, multicompany

- Personalization by user including social ERP for effective collaboration

- Integral business insights for stronger business performance

- Global footprint with low total cost of ownership
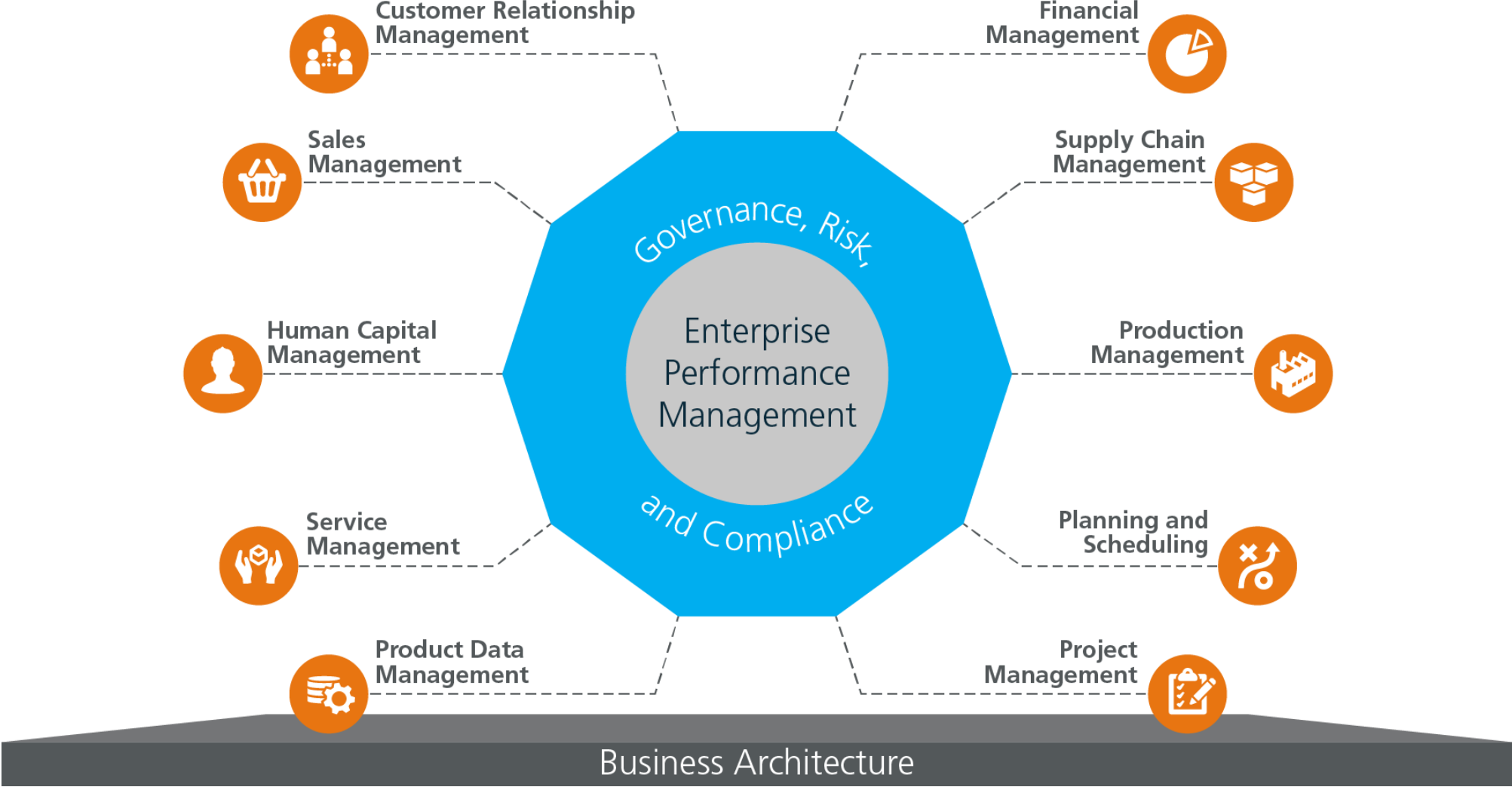
EPICOR.

# Epicor ERP
## 5 Key Principles



**Collaboration**
- Social Enterprise
- Commerce Connect
- ERP for everyone

**Mobility**
- Fluid UX
- Touch
- Web UI

**Choice**
- Cloud
- Virtualization
- On premise

**Epicor ERP 10**

Rich Global Application
Agile Business Architecture

**Simplicity**
- Pure Microsoft® stack
- Graphical BPM
- User interface

**Responsiveness**
- Performance
- Install/upgrade
- Ease of use

EPICOR.
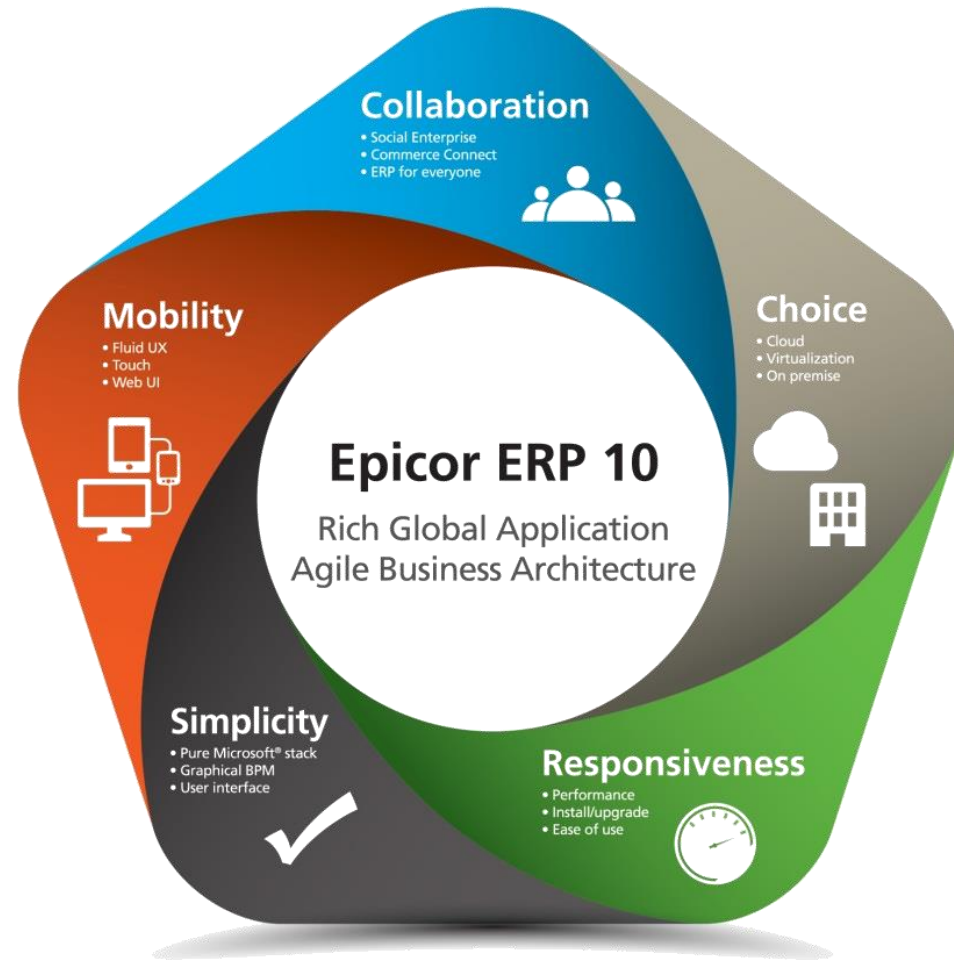
# Gartner
## Magic Quadrant

This Magic Quadrant focuses on ERP systems that support a single instance strategy for multi-entity midmarket and upper-midmarket companies.

This graphic was published by Gartner, Inc. as part of a larger research document and should be evaluated in the context of the entire document. The Gartner document is available upon request from Epicor Software Corporation.

Gartner does not endorse any vendor, product or service depicted in its research publications, and does not advise technology users to select only those vendors with the highest ratings or other designation. Gartner research publications consist of the opinions of Gartner's research organization and should not be construed as statements of fact. Gartner disclaims all warranties, expressed or implied, with respect to this research, including any warranties of merchantability or fitness for a particular purpose.

Source: Gartner (November 2014)

EPICOR.

# Business Architecture
## Choice and Flexibility

- Aligns ERP with the tools and devices business people use today
  - Laptops and mobile devices
  - Microsoft Office
  - Windows or Web
- Enhance and enforce agile business processes at the business level
  - Business Process Management
  - Service Connect
- Fuses SOA and Web 2.0 to harness the power of collaboration
  - Enterprise Search
  - Composite applications
  - Presence, RSS
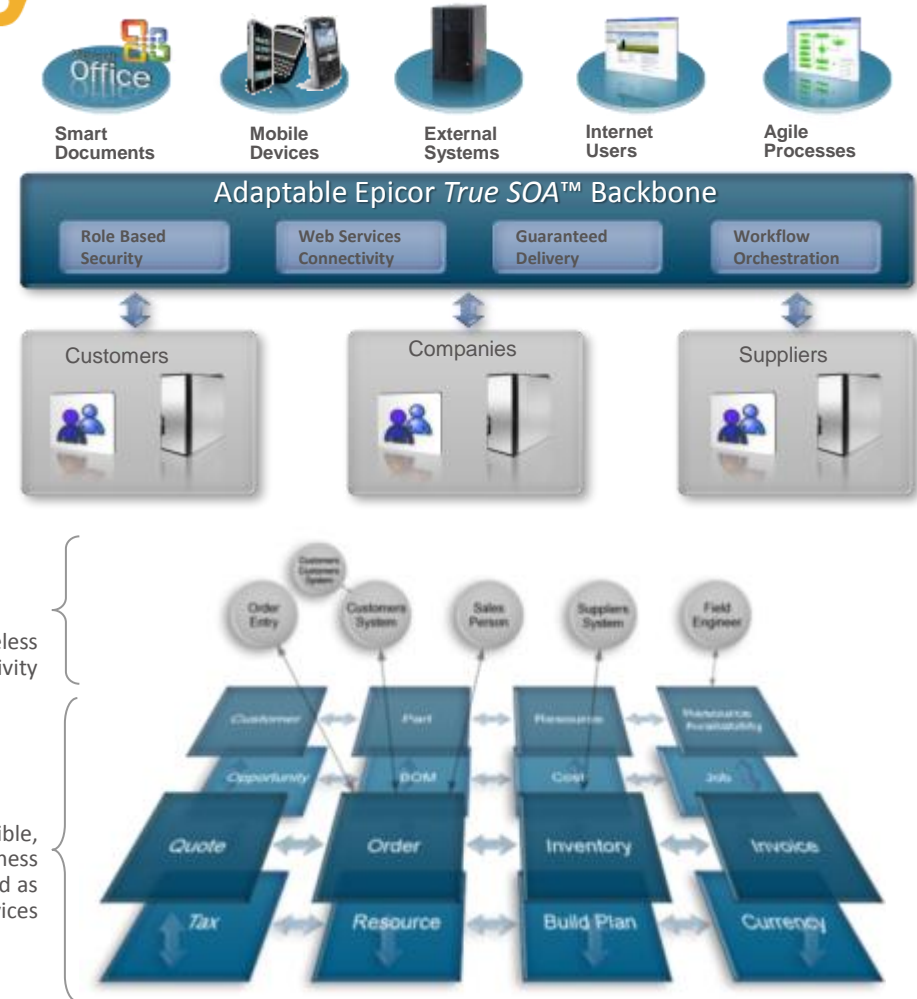
# Epicor and Microsoft
# Aligned for the Future

## TODAY

Windows 8
Microsoft SQL Server 2012
Windows Server 2012
Windows Phone
Microsoft SQL Server PowerPivot for Excel
SharePoint
Visual Studio

✓ Office 2010
✓ SQL Server 2012
✓ SQL Server PowerPivot
✓ SharePoint 2013
✓ Windows Server 2012
✓ Windows 8
✓ Windows Mobile
✓ Windows Phone
✓ Visual Studio 2012

## FUTURE

Windows Azure
Microsoft SQL Azure
Office
Office 365

✓ Office 2013
✓ Office 365
✓ Windows Azure
✓ SQL Azure
✓ HDInsight Server (Big Data)
✓ SQL Server PowerPivot
✓ SQL Server "Hekaton"

EPICOR.

# Epicor for Information Workers

| Epicor ERP | Office Business Applications (OBA) | |
|---|---|---|
| *"It looks like it was designed for me."* | *"All the information is online at my fingertips."* | *"I spend all day in Outlook."* |
| **Dedicated** | **Composite** | **Immersive** |



**Connecting People, Processes, and Applications**

**EPICOR.**

# Industry-Recognized
## Solutions

EPICOR.

# Services and Support
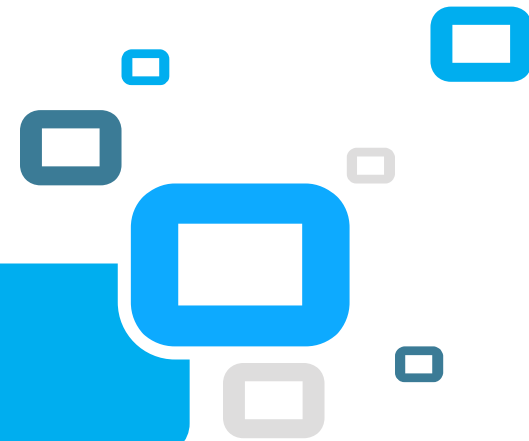
Signature **Methodology**

| Prepare | Plan | Design | Validate | Deploy |
|---|---|---|---|---|
| • Requirements Discovery<br><br>• Scope Definition | • Project Initiation<br><br>• Epicor Process Review<br><br>• Project & Resource Plan | • Foundation Education<br><br>• Configuration<br><br>• Business Procedures<br><br>• Proof of Concept | • User Acceptance<br><br>  ✓ Preparation<br><br>  ✓ Testing<br><br>  ✓ Analysis | • End-user Training<br><br>• Deployment/Go Live<br><br>• Project Close<br><br>• Support Hand-off |

**PROJECT GOVERNANCE**     **COLLABORATIVE IMPLEMENTATION**     **CONTINUOUS IMPROVEMENT**

EPICOR.

# Global
## Services

- Approximately 1,000 worldwide consultants and more than 400 partners

- Industry, product & technology certified

- Best practice implementation methodology

- Extensive education and training resources
  - Classroom, on-site, eLearning, embedded

- Strategic outsourcing services
  - Hosting, application management, helpdesk

EPICOR.

# Global **Support**

- Approximately 1,000 dedicated support professionals

- 100% direct Epicor employees

- Average 6+ years of experience

- 30+ languages

- 1st line support
  - Epicor, Technology, 3rd Party Software

- 12 global support centers

EPICOR.

**Epicor University**

### Instructor-Led Courses

- Classroom
- Virtual courses
- Worldwide access to over 100 courses with instructor, solution, and real business data

### Self-Paced Learning

- Embedded courses
- Epicor Knowledge Mentor
- On-demand tutorials
- Learning available at any time

### Documentation

- Illustrated, detailed instructions of major application functions
- Online, printed, or eBook options

**EPICOR.**

# Epicor
# Value Proposition

| Company | • Founded in 1972<br>• ~ $0.9 B revenue*<br>• ~ 3,900 employees worldwide, 400 partners |
|---|---|
| Customers | • Customer-centric focus<br>• Standard tiered solution to global enterprises<br>• Over 20,000 customers |
| Products | • End-to-end solutions focused by industry<br>• Manufacturing, retail, distribution, services<br>• World-class functionality |
| Technology | • Leading business software company based on Microsoft<br>• .NET and Web services architecture<br>• Solutions designed for flexibility, extensibility and scalability |
| Services | • Single point accountability with direct global sales and support<br>• Supporting customers in 150+ countries, 30+ languages<br>• Proven rapid ROI and low TCO |

*Fiscal year ended September 30.  These financials have been adjusted to reflect the spinoff of our former Retail Solutions Segment.

EPICOR.

# Epicor
## Inspires Business
### to Work Smarter

**Our solutions help manage and automate the flow of information across all aspects of the enterprise—inspiring your business and employees to focus on your highest priority:**

## Your
# Customer

EPICOR.

# Questions?

EPICOR.

![Epicor Business Inspired® logo]
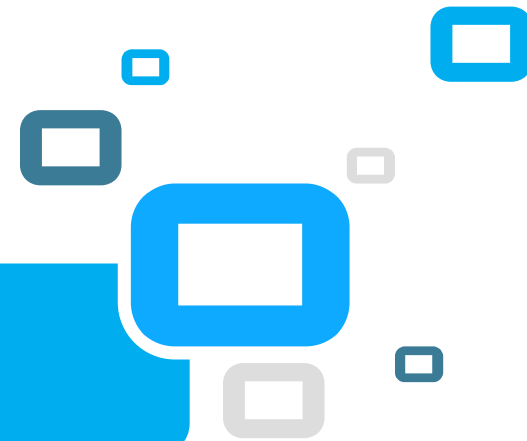
# Challenge
# **Inspires**
# Opportunity

**Name**
**Title, Company**

Efficiency **Inspires** Productivity

**Name**
**Title, Company**

**EPICOR.**

Business Inspired®

Insight
**Inspires**
Success

**Name**
**Title, Company**

# Teamwork
## Inspires
# Achievement

**Name**
**Title, Company**

Teamwork
**Inspires**
Achievement

**Name**
**Title, Company**

# Corporate Overview

**Name**

**Title, Company**

# Alternative Section Divider

**EPICOR.**

**Business Inspired**

**Serving customers**, partners, and employees

**Enabled by mobility**—smartphones, tablets, and smart devices

Focused on **in-the-moment** tasks and decisions

Delivered in the individual's **personalized context**

Providing **analytics-driven** experiences

Highly collaborative through embedded **social technologies**

Accessible on-demand, anywhere through the Web and **cloud**

EPICOR.

# Visionary Approach

Place **customers at the center** of everything we do

Develop and deliver **world-class software** to
help our customers achieve operational excellence

Provide innovative technologies that
**empower our customers** to become market leaders

Surround our customers with resources and self-service tools
to provide **world-class customer service** and satisfaction

Deliver **single point accountability** in everything we do

EPICOR.

# About Epicor

## Our Mission

To be the leading global provider of industry-specific business applications that drive growth and profitability for our customers

## A Visionary Approach

- Innovative products based on leading next-generation technology
- End-to-end solutions with deep industry functionality
- Global capabilities with a single-point of accountability
- Flexible deployment tailored to the customer (On premises, Hosted, Cloud)
- Exceptional customer service focused on "customers for life"
- The lowest TCO with proven ROI

# Our Values

**Passion**
Love what we do

**Innovation**
Imagine, create, deliver

**Integrity**
Do what we say

**Teamwork**
Better together

**Excellence**
Always make it better

**Service**
Customers first

EPICOR.

# Leadership Team

**Joe Cowan**
President and CEO

**Kathy Crusco**
Chief Financial Officer

**Keith Deane**
EVP, International

**Craig McCollum**
EVP, Americas
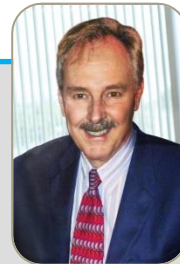
**Jeff Kissling**
Chief Technology Officer

**Juanita Lott**
Chief Human Resources Officer

**Janie West**
Chief Product Officer

**Mark Mincin**
Chief Information Officer

**Ian Ashby**
SVP, Global Support

**Celia Fleischaker**
SVP, Global Marketing

EPICOR.
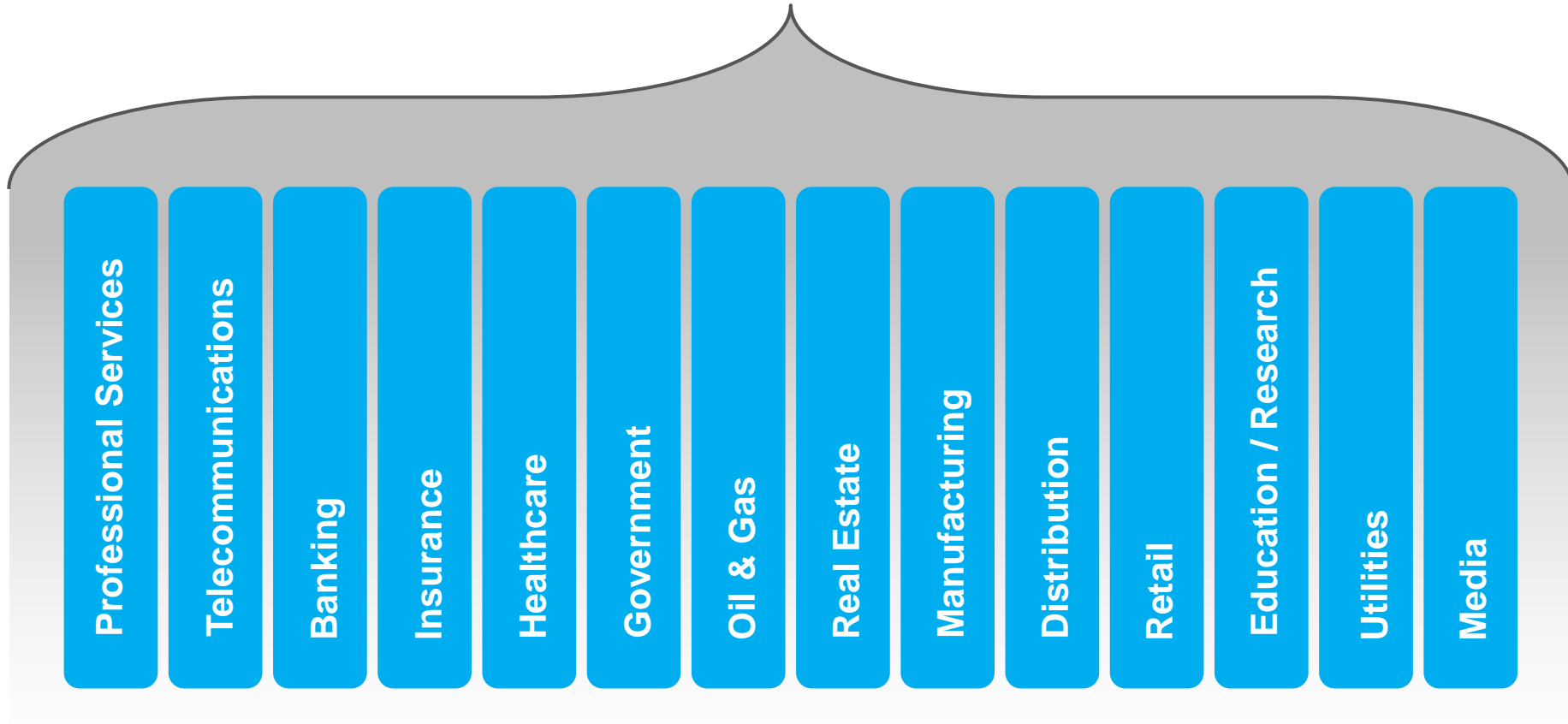
# Laser-Focused
## Vertical Approach

- Professional Services
- Telecommunications
- Banking
- Insurance
- Healthcare
- Government
- Oil & Gas
- Real Estate
- **Manufacturing**
- **Distribution**
- **Retail**
- Education / Research
- Utilities
- Media

**We know** *your business!*

EPICOR.

# Unique Industry
## Position

### Niche Provider

Feature rich

Deep domain expertise

Easier to implement

### EPICOR.

Feature rich

Deep domain expertise

Direct partnership

Financial stability

User friendly

Cost effective solutions

### Generic Provider

Global scale

Financial stability

Re-sellers

New technology

EPICOR.

# Manufacturing
## Customers

## BUSINESS ISSUES

Chirch Global Manufacturing, a family-owned provider of precision metal fabrication, stamping, progressive die tooling, and sub-assemblies needed a *responsive, cloud-based ERP solution* to support its 24x7 hybrid onshore/offshore operations.

## SOLUTION

A complete end-to-end ERP solution provided in the SaaS model, **Epicor Manufacturing Express Edition** delivers broad functionality, particularly for the specific needs of contract manufacturers, job shops, and small- to midsize businesses.

## RESULTS

"We wanted the most current and future looking technology, and Epicor, with its roots in contract manufacturing applications, as well as its strong Software-as-a-Service ERP solution, as a great fit."

**Anthony L. Chirchirillo**
*CEO, Chirch Global*

# Distribution
## Customers

# Retail
# Customers

# Services
## Customers

# 4,500 Distribution Customers
## and Counting

EPICOR.

# HVAC
# **Distribution**

JOHNSTONE SUPPLY

Carrier — United Technologies

WP Wholesale Plumbing Supply Co. Inc.

TORRCO
PLUMBING | PIPING | HVAC | KITCHEN & BATH

SERVICE SUPPLY
SINCE 1949
FIRST CHOICE IN SERVICE

CANYON
Pipe & Supply Inc

LEHMAN PIPE & PLUMBING SUPPLY, INC

"Eclipse provides such an accurate overview of our entire stock, no matter the location, that it has helped us to reduce inventory by 10-15 percent. The system even alerts us when we're low or about to run out of a specific item, which has enhanced our cash flow and revenue streams, since we're no longer overstocking the warehouse."

**Thomas Ditchfield**
*Executive Vice President*
*Wholesale Plumbing Supply Company*

EPICOR.

# Fastener Distribution



> "The integrated supply management capability of Prophet 21 is great for VMI and MRO—now we have one solution for billing, data mining, and reporting, all customized for our customers."
>
> **Jim Ruetz**
> *President & General Manager*
> *All Fasteners*

# Industrial **Distribution**



STELLAR INDUSTRIAL SUPPLY

TEXCEL

DXP

IDC-USA

DGI SUPPLY
a DoALL Company

paca
Industrial Distribution

"Prophet 21 has cut the time it takes to pick orders in half, which means we're getting stock out the door much faster than we did in the past. Epicor has a proven track record in distribution.... It's been a good partnership, and we couldn't be happier."

**Jack Bailey**
*President and CEO*
*IDC-USA*

EPICOR.

# Fluid Power
# **Distribution**



"With Prophet 21, it seems each week we're finding another feature that we didn't know existed, but provides a better, simpler way to do things."

**Daniel Delannoy**
*Information Technology Specialist*
*Power & Rubber Supply Inc.*

EPICOR.

# Manufacturing

"Epicor dashboards saved our program managers approximately 30% in data entry time, which resulted in a cost savings of approximately $80,000 over a one-year period."

*Jennifer Mesiano*
*IT Manager, Walton Signage*

EPICOR.

# Distribution

"Our end goal is to free up time our customer service reps currently spend on non-value-added processes and redirect it toward creating value for our customers."

*Rene Savage*
*Stellar Industry Supply's Technology VP*

**EPICOR.**

# Retail

"...this new system has given us hope that all our departments can successfully work together—accounts payable, accounts receivable, the sales floor, purchasing, and receiving."

*Brent Compton*
*Pacesetter Sports*

**EPICOR.**

# Services

"...the flexibility of the software and the competence of the team was a major factor in our selecting Epicor."

*Robin Sproull, Head of Business Systems*
*Threadneedle Asset Management*

**EPICOR.**

# "The bottom line: Time to reconsider Epicor 10 in short lists."

**Ray Wang**

**Principle Analyst & Founder**

*Event Report: Epicor Recaptures Mojo with Insights 14*

May 3, 2014

EPICOR.

constellation
RESEARCH™

# Leading
## Distribution Solution

- **34%** of Industrial Distribution's Big 50

- **56%** of Electrical Wholesaling's Top 200

- **42%** of Supply House Times' Premier 150

- **39%** of The Wholesaler's Top 100
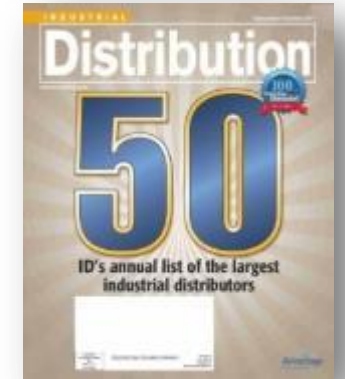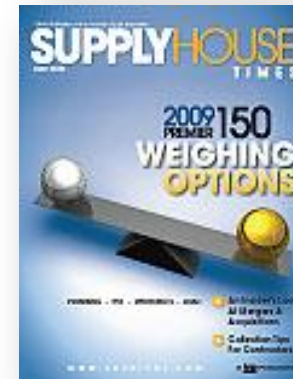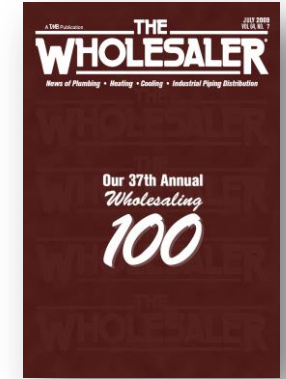
EPICOR.

# Midmarket ERP
# Vendor Landscape

Study recognizes Epicor as **champion** and **best overall value** and ranks Epicor first out of ten ERP companies analyzed with an overall value score of 100, providing "more bang for the buck" than the average vendor.

Info-Tech emphasizes Epicor ERP product strengths:

- Flexible Service-Oriented Architecture (SOA) allows enterprises to model business rules and minimize customization.

- Strong and consistent UI for non-IT users.

- Excellent integration for linking a wide range of content into the data warehouse.

- Embedded functionality reduces integration costs.

Source: Info-Tech Research Group, "Vendor Landscape: Mid-Market ERP" (July 2014)



Epicor provides a strong mobile platform for sales-focused organizations

**Vendor Landscape**

INNOVATOR — CHAMPION
EMERGING PLAYER — MARKET PILLAR

| Product | | | | | Vendor | | | | |
|---|---|---|---|---|---|---|---|---|---|
| Overall | Features | Usability | Afford. | Arch. | Overall | Viability | Strategy | Reach | Channel |

**Usability**

- 👍 Better than average
- 👉 Not a defining feature
- 👎 Not a strength

☐ Public
☒ Private
☒ Vendor

**Administration**
- Ease of administration 👉
- Role-based controls 👍
- Process management 👍
- Ease of update 👉

**End user**
- Social tools (process follow, integrated messaging) 👍
- User-configurable view 👍
- Intuitive workflow-building GUI 👉

**Value Index**

# 100
1st out of 10

**Features**

| Analytics and Reporting | Mobile Applications | Multi-site ERP functionality | Integration with end-user tools | Exception mgmt | Industry specific modules | Horizontal support | BPM support | Doc. mgmt | App. Dev. platform |
|---|---|---|---|---|---|---|---|---|---|

**Info-Tech Recommends:**

Distributed organizations looking for a single platform for sales, manufacturing, and business processes will find great value in Epicor.

Vendor Landscape: Mid-Market ERP          Info-Tech Research Group          18

# Nationwide
## Network

- 40+ Years of Experience

- 120 Local Platform Specialists

- 5,000 Total Installations

- 200+ Installations per year

- 70 Professional Service Experts

- Dozens of large/complex implementations each year

Montreal QC

Port Coquitlam, BC

London, ON

Denver, CO

Philadelphia , PA

Dublin, CA

Austin, TX

EPICOR

# Microsoft Global Partner

## Elite Microsoft Partnership

- Gold Application Development Competency
- Microsoft Global Independent Software Vendor (GISV)
- Microsoft Services Partner Advantage Program

## Microsoft Award Winning Solutions

- Sales Achievement Award for Services and Support, 2013
- GISV Partner of the Year Finalist, 2010 (Australia)
- GISV Partner of the Year LOB Winner, 2009
- GISV Partner of the Year Industry Finalist, 2009
- GISV Partner of the Year LOB Finalist, 2008
- GISV Partner of the Year Technology Innovation Finalist, 2008
- GISV Partner of the Year Finalist, 2007
- GISV Partner of the Year Finalist, 2004
- .NET Application of the Year, 2003 (EMEA)
- ERP Solution of the Year, 2001

EPICOR

"We value the long-standing and ever-expanding partnership Microsoft and Epicor share—a prime example of the success that can be achieved through a focused, mutually beneficial relationship.

We applaud Epicor for its continued adoption of forward-looking technologies from Microsoft. The strong combination of Epicor and Microsoft, with a proven history of innovation, continues to drive added value and create new business benefits for Epicor customers worldwide."

**Kim Akers**
*General Manager, Partner Evangelism*
*Microsoft Corporation*

**Microsoft**

EPICOR.

"We value the long-standing and ever-expanding partnership Microsoft and Epicor share—a prime example of the success that can be achieved through a focused, mutually beneficial relationship.

We applaud Epicor for its continued adoption of forward-looking technologies from Microsoft. The strong combination of Epicor and Microsoft, with a proven history of innovation, continues to drive added value and create new business benefits for Epicor customers worldwide."

**Kim Akers**
*General Manager, Partner Evangelism*
*Microsoft Corporation*

Microsoft

EPICOR.

# Epicor ERP



**Financial Management**
- General Ledger
- Accounts Payable
- Accounts Receivable
- Credit and Collections
- Cash Management
- Fixed Asset Management
- Financial Planning
- Advanced Financial Reporting
- Advanced Allocations
- Consolidations and Eliminations
- Tax Connect

**Supply Chain Management**
- Purchase Management
- Distribution Requirements Planning
- Inventory Management
- Shipping and Receiving
- Warehouse Management
- Advanced Material Management
- Supplier Relationship Management
- Supplier Connect

**Customer Relationship Management**
- Contact Management
- Lead and Opportunity Management
- Case Management
- Marketing Management
- Mobile CRM
- Customer Connect

**Production Management**
- Job Management
- Lean Production
- Manufacturing Execution System
- Quality Assurance
- Advanced Quality Management
- Advanced Manufacturing Execution System
- Enterprise Manufacturing Intelligence

**Sales Management**
- Estimate and Quote Management
- Order Management
- EDI/Demand Management
- Point of Sale
- Commerce Connect
- Mobile Sales Assist

**Planning and Scheduling**
- Forecasting and Master Production Scheduling
- Material Requirements Planning
- Scheduling and Resource Management
- Advanced Planning and Scheduling

**Human Capital Management**
- Core HR
- Payroll (US)*
- Recruitment
- Reporting & Analytics
- Talent Management
- Direct Access
- Mobile HCM

**Project Management**
- Project Planning
- Resource Management
- Time Management
- Expense Management
- Project Billing
- Mobile Time
- Mobile Expense

**Service Management**
- Field Service
- Contract Management
- Maintenance Management
- Returned Material Authorization
- Mobile Field Service

**Product Data Management**
- Bill of Materials
- Routings
- Product Costing
- Engineering Change and Revision Control
- Product Lifecycle Management
- Product Configuration

*Enterprise Performance Management*
*Governance, Risk and Compliance*
*Business Architecture*

**Enterprise Performance Management**
- Planning and Forecasting
- Operational Data Store and Data Warehousing
- Scorecards and KPIs
- Role Based Content
- Trackers and Dashboards
- Mobile Business Intelligence

**Governance, Risk, and Compliance**
- Risk Management
- Security Management
- Corporate Governance
- Global Trade Compliance
- Environmental and Energy Management

**Business Architecture**
- SaaS, Hosted, and On-Premise Delivery
- Services Architecture
- Microsoft® .NET and SQL Server® Optimized
- Web Access, Mobile Access, Web Services
- Business Activity Queries
- Enterprise Search
- Business Process Management
- Information Worker
- Service Connect
- Microsoft SharePoint® Publisher
- Social Enterprise

**Global Business Management**
- Multicompany Management
- Multicurrency Management
- Global Multisite Management
- Multilingual Data Management
- Master Data Management
- Country Specific Functionality

*Available in the US only - please check with your Epicor office for local solutions.

Copyright © 2014 Epicor Software Corporation or a subsidiary or affiliate thereof. All rights reserved. Rev 2/14.

EPICOR.

# Epicor Eagle



**Managed Services**
- Secure Data Backup
- Watchdog
- Eagle as a Service

**Point of Sale**
- Point of Sale
- Offline Point of Sale
- Bar Code Scanning
- Signature Capture
- Electronic Journal
- Catalog
- Catalog Update
- Dynamic Promotions
- Bag/Bucket Sale
- POS Touch
- Biometric Reader
- Consumer Digital Display
- Digital Receipts
- Service and Repair

**Implementation and Training**
- Training On Demand
- Eagle Help
- Business Consulting Services
- Platform Services
- Classroom and Online Training

**Payment**
- Credit Card Authorization
- Debit Card Authorization
- Debit Card Bin Range Steering
- Dial-up Gift Card
- Address Verification
- Check Verification
- Electronic Check Conversion
- Flexible Spending Account and Electronic Benefit Transfer Processing
- Farm Plan
- In-Store Gift Card

**Logistics**
- Dispatch and Delivery
- Delivery Confirmation

**Order Management**
- Quotes and Bids
- Customer Order Management
- Professional Estimating
- Andersen® Windows Import
- Advanced Special Orders

**Rental**
- Total Rental

**Customer Management**
- Accounts Receivable
- CRM
- Eagle Loyalty

**Financial Management**
- General Ledger
- Accounts Payable
- Payroll
- TimeClock Plus
- Accounts Receivable Pro
- Pricing Planner

**Platform, Utility, and Add-on Products**
- Vendor Communications
- Label Printing
- Enhanced Fax
- Multi-Store
- Printing Plans

**Inventory and Purchasing Management**
- Inventory
- Bill of Materials
- Lot Tracking
- Inventory and Price Update Tools
- Purchasing and Receiving
- Advanced Receiving
- Vendor Rebates
- Stock Transfer Balancing
- Centralized Inventory
- Inventory Transaction Register
- Inventory Planner
- Buyers Purchasing
- Attribute Management – Color, Size, Style

**Electronic Commerce**
- eCommerce
- Accounts Online
- eStatements, eInvoices, and ePurchase Orders
- Third Party Data Feed
- iNet™ Outside Sales
- iNet Catalog
- Vendor Direct
- Remote Connect

**Analytics and Reporting**
- Compass™ Business Intelligence
- Business Advisor™
- Performance Manager
- System Audit and Reporting Tools
- Archive Manager
- Request Report Writer
- ODBC

**Mobile**
- Mobile Inventory
- Mobile POS
- Mobile Manager
- Price Checker

**Document Management**
- Document Management
- Document Scanning
- Remote Signature Capture

EPICOR.

# Epicor Eagle Aftermarket

**Point of Sale**
- Point of Sale
- Offline Point of Sale
- Bar Code Scanning
- Signature Capture
- Electronic Journal
- Dynamic Promotions
- LaserCat® 3 Catalog Integration
- Biometric Reader
- Consumer Digital Display
- Digital Receipts
- Service and Repair
- Dynamic Coupons

**Managed Services**
- Secure Data Backup
- Internet Security Services

**Implementation and Training**
- Eagle Help
- Business Consulting Services
- Platform Services
- Classroom and Online Training

**Payment**
- Credit Card Authorization
- Debit Card Authorization
- Debit Card Bin Range Steering
- Address Verification (Retail & MOTO)
- Check Verification
- Electronic Check Conversion
- Epicor Payment Exchange
- In-Store Gift Card
- Flexible Spending Account and Electronic Benefit Transfer Processing

**Logistics**
- Dispatch and Delivery
- Delivery Confirmation
- GPS Asset Tracking

**Order Management**
- Quotes and Bids
- Customer Order Management
- Professional Estimating
- Advanced Special Orders

**Connectivity**
- Epicor Parts Network
- EDI document exchange of PO, ASN and Invoice
- Website Design and Implementation

**Customer Management**
- Accounts Receivable
- CRM
- Eagle Loyalty
- Eagle Loyalty Manager

**Platform, Utility, and Add-on Products**
- Multi-store
- Vendor Communications
- Inventory Update Tool
- Price Update Tool
- General Ledger Import Tools
- Electronic Data Integration

**Financial Management**
- General Ledger
- Accounts Payable
- TimeClock Plus
- Accounts Receivable

**Data Products**
- LaserCat® 3
- BuyersAssist
- Service Intervals
- VIN Number Lookup
- OEM Catalog
- LaborExpert
- Tire Fitment
- Cover-to-Cover
- Active Updates
- RepairExpert
- Interchange
- Powersports
- Telepricing
- Barcode Expert

**Inventory and Purchasing Management**
- Inventory
- Bill of Materials
- Purchasing and Receiving
- Advanced Receiving
- Vendor Rebates
- Stock Transfer Balancing
- Centralized Inventory
- Inventory Transaction Register
- Buyers Purchasing

**Electronic Commerce**
- eCommerce
- Accounts Online
- eStatements, eInvoices, and ePurchase Orders
- Third Party Data Feed
- iNet™ Outside Sales
- Vendor Direct
- Remote Connect
- EPN eStore
- Listing Expert
- VAR Integration to Third-Party SD Systems
- Epicor Parts Portal
- EPN Consumer eCommerce Website
- Epicor Internet Auto Parts
- Integrated Service Estimator

**Analytics and Reporting**
- Compass™ Business Intelligence
- Business Advisor™
- System Audit and Reporting Tools
- Archive Manager
- ODBC
- Vista Business Intelligence

**Mobile**
- Mobile Manager
- Price Check
- Mobile Lookup
- Mobile Picking, Receiving, and Inventory
- Store sales
- Alerts and Overrides

**Document Management**
- Document Management
- Document Scanning
- Remote Signature Capture

Epicor® Eagle® for the Aftermarket

Business Architecture

EPICOR.

# Epicor Eclipse

## Financial Management
- General Ledger
- Accounts Receivable
- Accounts Payable
- Credit Management
- Time-lined Accounting
- Activity-based Costing

## Order Management
- Rapid Sales Order Entry
- Quote Management
- Profit and Rebate Management
- Customer Personalization
- Automatic Allocation
- Commissions Management
- Gift Card/Loyalty Program Management
- Mobile and eCommerce
- Job Management
- Project Management

## Reporting and Analytics
- Business Intelligence
- Pre-configured Reports
- Custom Report Writer
- KPI Reporting
- Event Tracking
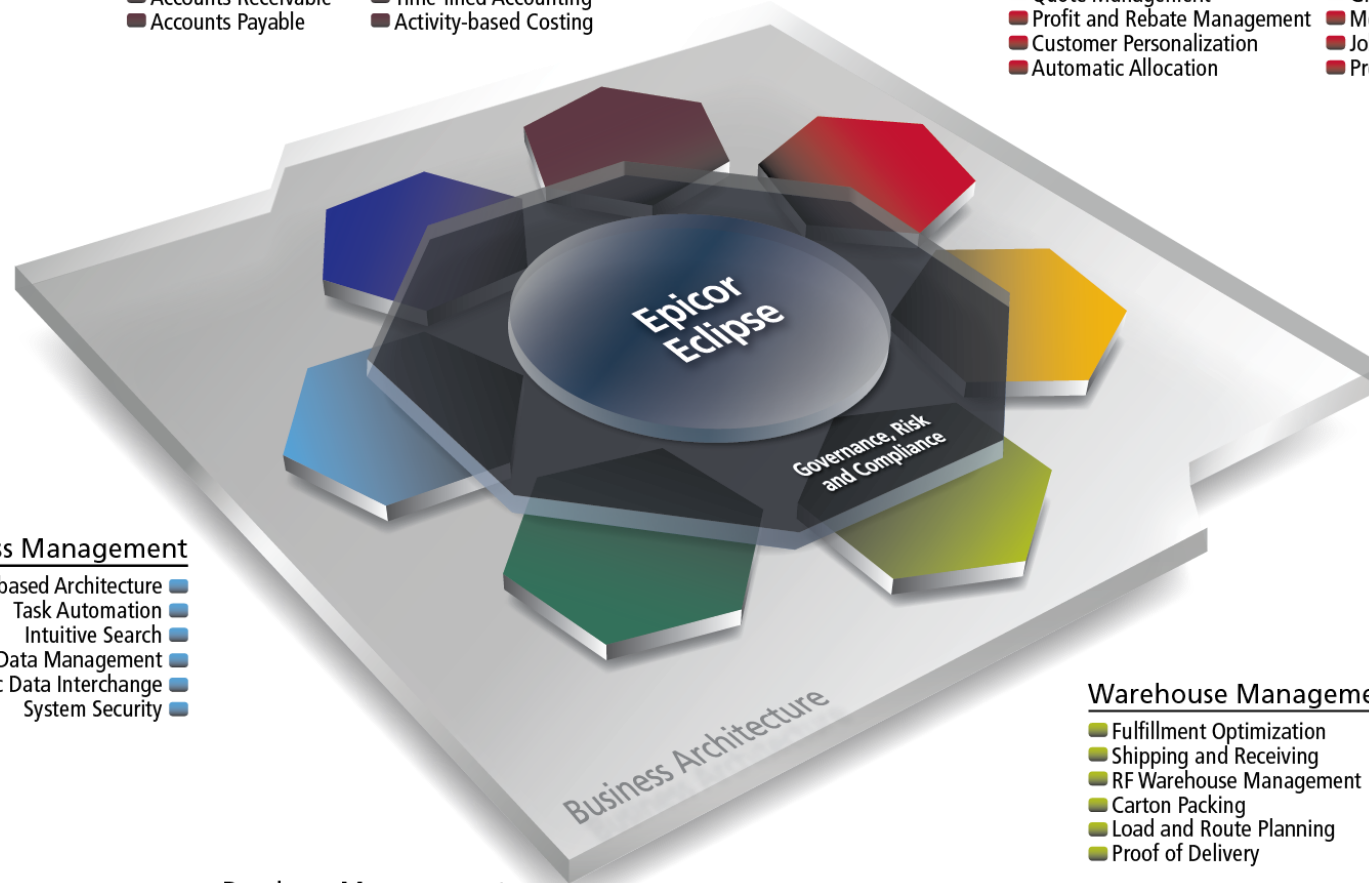
## Inventory Management
- Cost and Pricing Management
- Cycle and Physical Counting
- Product Lifecycle Management
- Returns Management
- Product Data Warehouse

## System-Wide Business Management
- Transaction-based Architecture
- Task Automation
- Intuitive Search
- Data Management
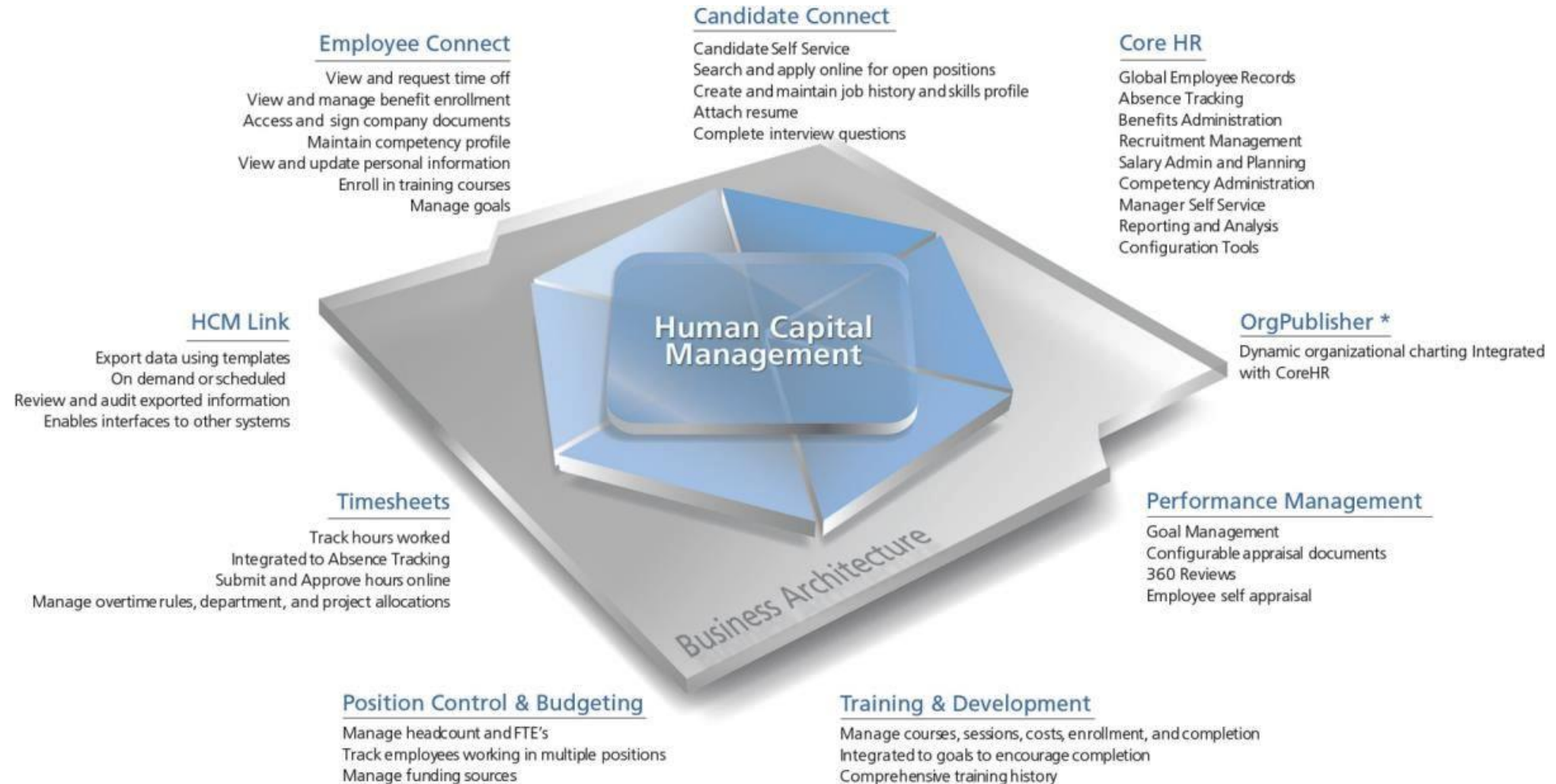- Electronic Data Interchange
- System Security

## Warehouse Management
- Fulfillment Optimization
- Shipping and Receiving
- RF Warehouse Management
- Carton Packing
- Load and Route Planning
- Proof of Delivery

## Purchase Management
- Automated Purchasing
- Buying Groups
- Demand Forecasting
- Replenishment Planning

Epicor Eclipse

Governance, Risk and Compliance

Business Architecture

EPICOR.

# Epicor HCM

**Employee Connect**

View and request time off
View and manage benefit enrollment
Access and sign company documents
Maintain competency profile
View and update personal information
Enroll in training courses
Manage goals

**Candidate Connect**

Candidate Self Service
Search and apply online for open positions
Create and maintain job history and skills profile
Attach resume
Complete interview questions

**Core HR**

Global Employee Records
Absence Tracking
Benefits Administration
Recruitment Management
Salary Admin and Planning
Competency Administration
Manager Self Service
Reporting and Analysis
Configuration Tools

**HCM Link**

Export data using templates
On demand or scheduled
Review and audit exported information
Enables interfaces to other systems

Human Capital Management

Business Architecture

**OrgPublisher \***

Dynamic organizational charting Integrated with CoreHR

**Timesheets**

Track hours worked
Integrated to Absence Tracking
Submit and Approve hours online
Manage overtime rules, department, and project allocations

**Performance Management**

Goal Management
Configurable appraisal documents
360 Reviews
Employee self appraisal

**Position Control & Budgeting**

Manage headcount and FTE's
Track employees working in multiple positions
Manage funding sources

**Training & Development**

Manage courses, sessions, costs, enrollment, and completion
Integrated to goals to encourage completion
Comprehensive training history

EPICOR.

# Epicor Informance

## Performance Benchmarking
- Correlate attributes across performance metrics
- Internal benchmarking
- Comparative inter-industry benchmarking
- Industry best practices
- Comparisons to world-class operations

## Monitoring, Data, and Communications
- Automated production monitoring
- Real-time production displays
- Automated alerts, messaging, and escalation

## Production Optimization
- Asset, plant, and enterprise optimization
- Analyze downtime and measure impact
- Evaluate schedule conformance
- Evaluate tactical options
- Rate optimization for cycle times

Epicor® Informance Enterprise Manufacturing Intelligence (EMI)

Business Architecture
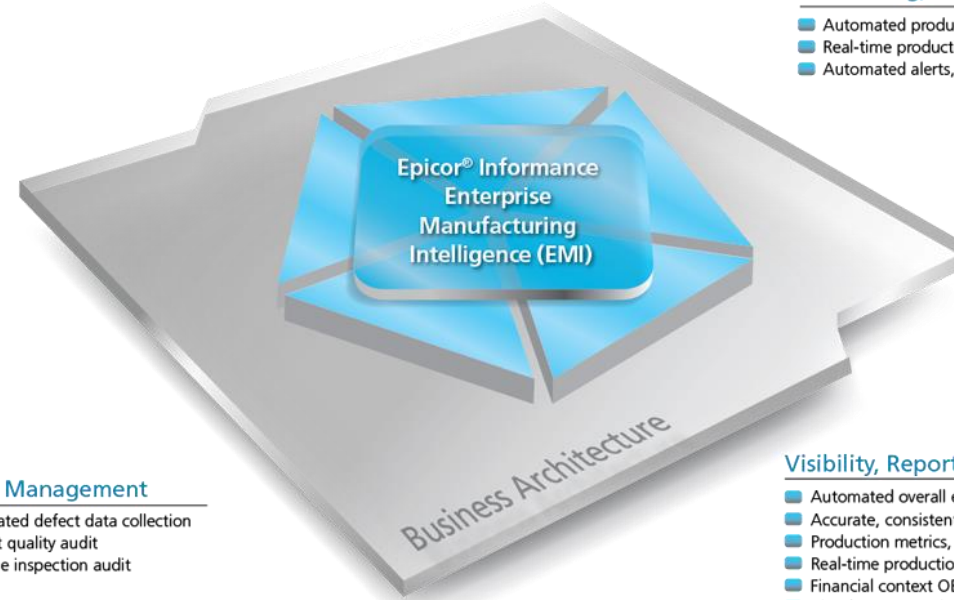
## Quality Management
- Automated defect data collection
- Product quality audit
- Machine inspection audit

## Visibility, Reporting, and Analysis
- Automated overall equipment effectiveness (OEE)
- Accurate, consistent efficiency metrics
- Production metrics, from machine to enterprise
- Real-time production displays
- Financial context OEE and performance metrics
- Visual root-cause indicators
- Capture downtime where, what, why
- Mobile apps to monitor performance

## Advisory Services and Project Management
- Accelerate improvements for faster ROI
- Project leadership to drive vertical implementation
- Best practice sharing
- Structured on-the-job training for stakeholders
- Coaching for standard work process integration
- Educate to interpret and analyze data
- Post-implementation need-based services

## Business Architecture
- On-premise or SaaS deployment
- Enterprise hub with plant nodes structure
- Microsoft® .NET Framework
- Web Services
- Microsoft SQL Server®
- Data warehouse
- Web reporting
- Mobile applications
- Integration server
- OPC, PLC, & PC interfaces

## Continuous Improvement (CI) Integration
- Lean
- Six Sigma®
- Theory of constraints (TOC)
- Total productive maintenance (TPM)
- Common and custom CI metrics
- OEE, asset utilization, capacity utilization
- Mean time between failures (MBTF)
- Minor stops per runtime hour (MS/RH)
- Mean time to repair (MTTR)
- Root cause factors

# Epicor Mattec

**Planning and Scheduling**
- Visual production scheduling and planning for machines and tools
- Automatic schedule adjustments
- Kanban scheduling
- Labor and material requirements forecasting
- Machine capacity planning
- Tool conflicts

**Monitoring, Data, and Communications**
- Automated production monitoring for machine runtime and downtime
- Operator help calls with automatic notifications
- Automated alerts, messaging, and escalation
- Automated monitoring for process parameters

**Production Optimization**
- Manage machine loading to minimize downtime
- Cost reporting for scrap and machine downtime
- Compare actual cycle times to standard and planning rates
- Asset, plant, and network optimization
- Evaluate schedule conformance

**Visibility, Reporting, and Analysis**
- Automated overall equipment effectiveness (OEE)
- Accurate, consistent efficiency metrics
- Production metrics, from machine to enterprise
- Downtime and scrap analysis
- Operator labor and productivity
- Visual root-cause indicators
- Real-time screens and views

Epicor® Mattec Manufacturing Execution System (MES)

Business Architecture

**Energy Management**
- Monitor and analyze energy consumption by machine, job, shift, product
- Understand maintenance and quality in context of energy consumption
- Analyze direct energy required to produce any item

**Quality Management**
- Automated process monitoring and parameter violation alarms
- Automatic part qualification/rejection
- Statistical process control (SPC) and statistical quality control (SQC)

**Maintenance Management**
- Machine and tool preventive maintenance
- Cycle or run hour preventive maintenance
- Automated notices for preventive maintenance

**Business Architecture**
- Accepts digital and analog machine signals directly from sensors or PLCs, or via OPC-compliant PLCs
- Microsoft® Windows Server® and Microsoft SQL Server® (current versions)
- Includes a template specific to plastics, metals, rubber and related industries, with complex capabilities like active cavity tracking and family molding

**Continuous Improvement (CI) Integration**
- Lean
- Six Sigma®
- Theory of constraints (TOC)
- Total productive maintenance (TPM)
- Common and custom CI metrics
- OEE, asset utilization, capacity utilization
- Mean time between failures (MBTF)
- Minor stops per runtime hour (MS/RH)
- Mean time to repair (MTTR)
- Root cause factors

EPICOR.

# Epicor Prophet 21

**Financial Management**
- General Ledger
- Accounts Payable
- Accounts Receivable
- Tax Connect

**System-Wide Business Management**
- Multi-Location
- Multi-Company
- Multi-Branch
- System Alerts
- DynaChange Screen Design
- E-mail Integration
- Pricing Service
- Document Linking
- Transaction Audit Trail
- DynaChange Rules and Portal

**Customer Relationship Management**
- Contact Management
- Lead and Opportunity Management
- Marketing Management

**Reporting and Analytics**
- Business Intelligence
- Executive Metrics
- 200+ Standard Reports
- Real-time Browser-Based Reporting
- Import/Export Data

**Order Management**
- Quote Management
- Order Management
- Pricing Matrix Management
- Advanced EDI
- Front Counter Sales
- eCommerce and Mobile
- Cut Product Management
- Automatic Allocation
- Rebate Tracking
- Commissions Management

**Service Management**
- Contract Management
- Warranty Management and Control
- Maintenance Scheduling
- Service Order Management
- Serialized Repair History
- Return Material Authorization

**Enterprise Performance Management**

**Governance, Risk and Compliance**

**Business Architecture**

**Inventory Management**
- Advanced Demand Forecasting
- Demand Replenishment Planning
- Branch Transfer Management
- Physical and Cycle Counting
- Return Goods Management
- Dynamic Bin Management

**Warehouse Management**
- Shipping and Receiving
- Wireless Transaction Processing
- License Plating/Tagging
- Multiple Pick Methods
- Cross-Docking

**Purchase Management**
- Vendor RFQ Management
- Direct Ship and Special Purchases
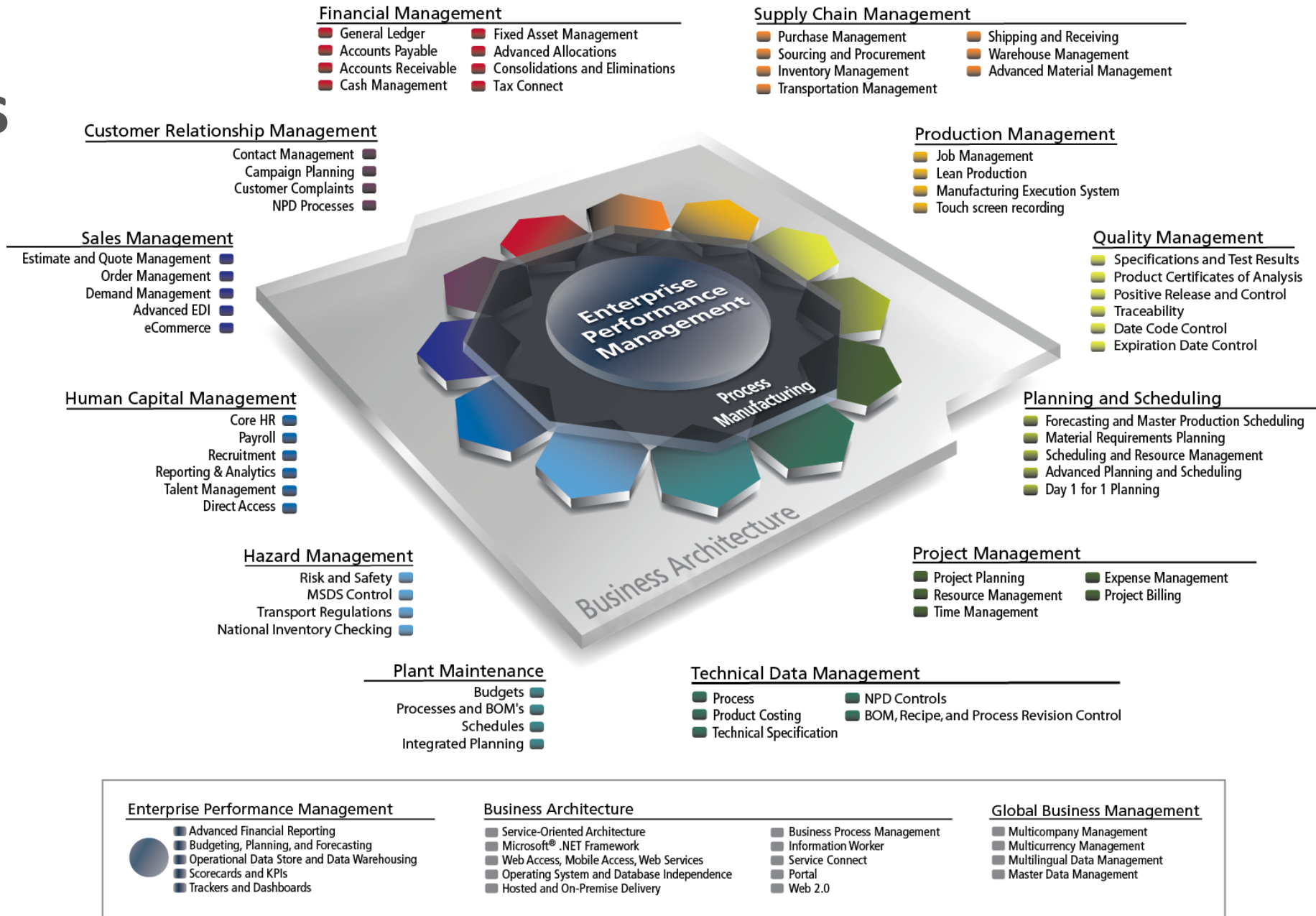- Landed Cost
- Freight Cost Allocation
- Vendor Rebate Tracking

EPICOR.

# Epicor Tropos

## Financial Management
- General Ledger
- Accounts Payable
- Accounts Receivable
- Cash Management
- Fixed Asset Management
- Advanced Allocations
- Consolidations and Eliminations
- Tax Connect

## Supply Chain Management
- Purchase Management
- Sourcing and Procurement
- Inventory Management
- Transportation Management
- Shipping and Receiving
- Warehouse Management
- Advanced Material Management

## Customer Relationship Management
- Contact Management
- Campaign Planning
- Customer Complaints
- NPD Processes

## Production Management
- Job Management
- Lean Production
- Manufacturing Execution System
- Touch screen recording

## Sales Management
- Estimate and Quote Management
- Order Management
- Demand Management
- Advanced EDI
- eCommerce

## Quality Management
- Specifications and Test Results
- Product Certificates of Analysis
- Positive Release and Control
- Traceability
- Date Code Control
- Expiration Date Control

## Human Capital Management
- Core HR
- Payroll
- Recruitment
- Reporting & Analytics
- Talent Management
- Direct Access

## Planning and Scheduling
- Forecasting and Master Production Scheduling
- Material Requirements Planning
- Scheduling and Resource Management
- Advanced Planning and Scheduling
- Day 1 for 1 Planning

## Hazard Management
- Risk and Safety
- MSDS Control
- Transport Regulations
- National Inventory Checking

## Project Management
- Project Planning
- Resource Management
- Time Management
- Expense Management
- Project Billing

## Plant Maintenance
- Budgets
- Processes and BOM's
- Schedules
- Integrated Planning

## Technical Data Management
- Process
- Product Costing
- Technical Specification
- NPD Controls
- BOM, Recipe, and Process Revision Control

**Enterprise Performance Management**

**Process Manufacturing**

**Business Architecture**

## Enterprise Performance Management
- Advanced Financial Reporting
- Budgeting, Planning, and Forecasting
- Operational Data Store and Data Warehousing
- Scorecards and KPIs
- Trackers and Dashboards

## Business Architecture
- Service-Oriented Architecture
- Microsoft® .NET Framework
- Web Access, Mobile Access, Web Services
- Operating System and Database Independence
- Hosted and On-Premise Delivery
- Business Process Management
- Information Worker
- Service Connect
- Portal
- Web 2.0

## Global Business Management
- Multicompany Management
- Multicurrency Management
- Multilingual Data Management
- Master Data Management

EPICOR.

# Expanded Best-in-Class
# Software Services

**Global ERP Services Teams**

**Professional Services Architects**

**Services Engineering**

**Project Management Office (PMO)**

**Business Consulting Services**

**Professional Services Delivery Centers**

## What does this mean for you?

- Seasoned consultants
- Proven methodology
- Best practices models
- Cost-effective engagement
- Faster time-to-value

EPICOR.

# Support
# Overview

- First line support for Epicor, technology, and third-party products

- Follow-the-sun support from 11 support centers worldwide

- Average six years of experience

- Support in more than 20 languages

- Epicor Certified

- Global CRM and telecommunications system

**380 support professionals worldwide. All direct employees.**

**EPICOR**

# Instructor-Led Training

- Over 100 Epicor ERP application and technical courses available worldwide
  - Conducted either at an Epicor training facility or virtually
- Professional instructors provide in-depth explanations
  - Individualized hands-on experience using a live Epicor ERP system
  - Activities using real business data

EPICOR.

# Self-Paced Learning

- Over 100 Embedded Courses launched from Epicor ERP
  - Uses a demonstration database
  - Courses updated with each release
- Temporary Training Environment
  - Epicor ERP core modules
  - Education database
  - Embedded courses
  - Access for 10 users
- Epicor Knowledge Mentor
- On-Demand Tutorials

EPICOR.

# Presentation Color Choices

- Calibri 33pt
  - Calibri 31 pt
    - Calibri 24 pt

| | |
|---|---|
| R 0<br>G 174<br>B 239 | R 88<br>G 85<br>B 85 |
| R 102<br>G 188<br>B 41 | R 144<br>G 141<br>B 137 |
| R 255<br>G 184<br>B 29 | R 0<br>G 69<br>B 106 |
| R 232<br>G 117<br>B 17 | R 59<br>G 123<br>B 150 |

EPICOR.

# Additional Slide Layouts

EPICOR.

# Sample Table Slide

| | | | | |
|---|---|---|---|---|
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |

EPICOR.

# Sample Smart Art Slide
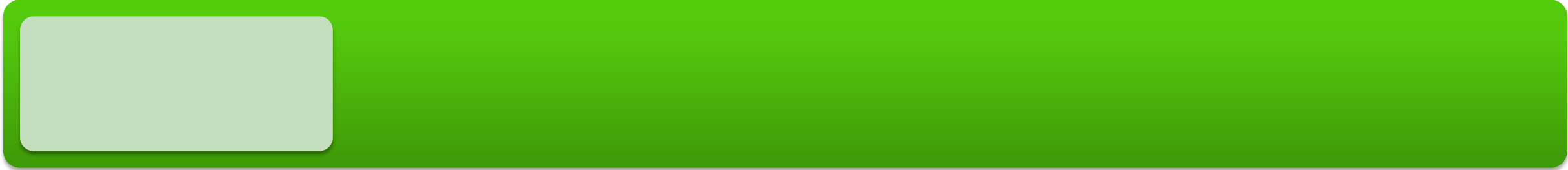
# Another Sample Smart Art

EPICOR.

# Safe Harbor Statement

**FORWARD-LOOKING STATEMENTS:** This Presentation may contain certain statements that may constitute forward-looking statements under the Private Securities Litigation Reform Act of 1995. These forward-looking statements may include statements regarding future product releases, future functionality, revenues, cash flows, growth prospects, installed base of customers, the launch of new products and other statements that are not historical fact. These forward-looking statements are based on currently available competitive, financial and economic data together with management's views and assumptions regarding future events and business performance at the time the statements are made and are subject to risks and uncertainties. Actual results may differ materially from those expressed or implied in the forward-looking statements. Such risks and uncertainties include but are not limited to changes in the demand for Epicor's products; the timely availability and market acceptance of new products and upgrades; the impact of competitive products and pricing; the discovery of undetected software errors; changes in the financial condition of Epicor's customers; and other factors discussed in Epicor's filings with the Securities and Exchange Commission, including Epicor's Annual Report on Form 10-K for the period ending September 30, 2014 and our quarterly reports on Form 10-Q. As a result of these factors the business or prospects expected by Epicor as part of this announcement may not occur. Epicor undertakes no obligation to revise or update publicly any forward-looking statements.

EPICOR.

# Additional Slide Layouts

EPICOR.
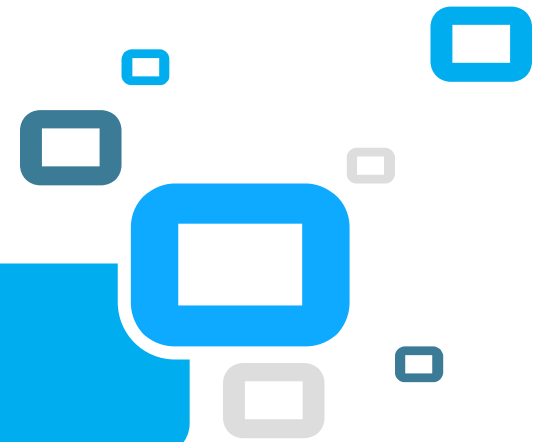
This image may be replaced to create a custom section divider. Copy and paste these elements to a blank slide.
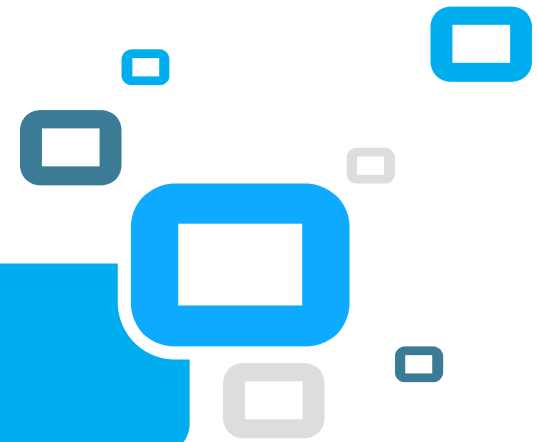
EPICOR.

"Alternate quote slide. Copy and paste these elements onto a blank page. The image may be replaced by right-clicking on the far right hand side of the slide and selecting "Change Picture". Then crop as needed.
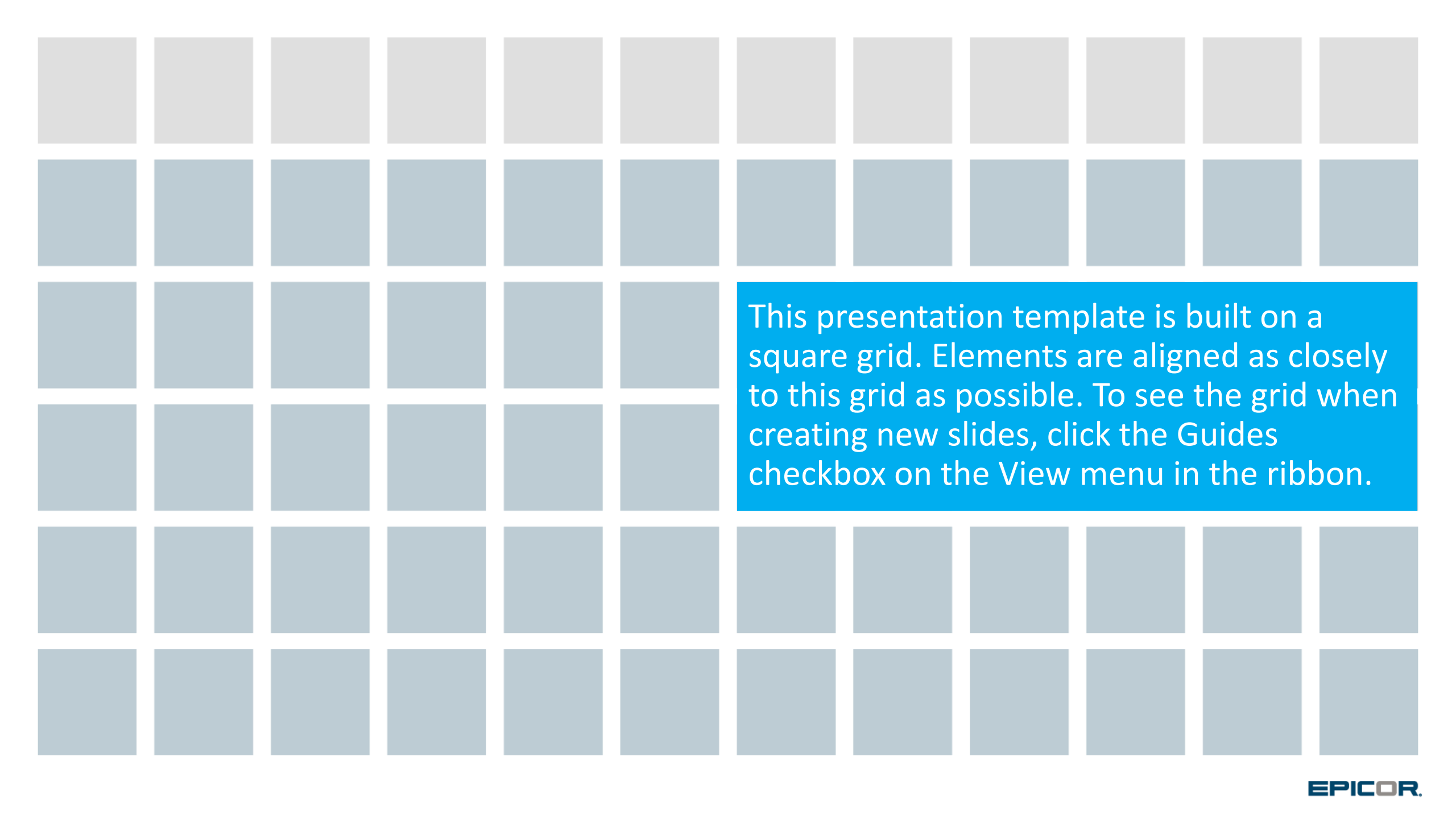
Replace with customer or analyst logo

**Name**
*Title*
*Company*

EPICOR.

# PowerPoint Hints and Tips

EPICOR

This presentation template is built on a square grid. Elements are aligned as closely to this grid as possible. To see the grid when creating new slides, click the Guides checkbox on the View menu in the ribbon.

EPICOR.

# Transferring Slides from an Old Presentation

- Open both presentations. In the old presentation, right click on the thumbnail of the slide(s) you wish to transfer and select Copy.

- In the new presentation, right click on the slide before the location where you want to insert your new slides. Select "Keep Source Formatting" under Paste.

- The new slide will appear using the old template.
  - Click on the Layout dropdown from the ribbon and select the new master layout from the Epicor-Corporate-Template-ENS-0115  that best fits your slide content.
  - This will automatically change the slide content to the new template and remove the old template from the presentation.

- Manually adjust any elements on your slides that did not transfer properly.

EPICOR.

# Thank You

EPICOR.