

Epicor

Prophet 21 for

Fluid Power Distributors

Introduction

Help Grow Your Business With a Solution Built for Your Industry

Today's leading power distributors—including Iowa Fluid Power, Dakota Fluid Power, Anderson Process, and more—trust the Epicor® Prophet 21® enterprise resource planning (ERP) solution to manage their business efficiently. Epicor is an active member of leading trade associations such as the Fluid Power Distributors Association (FPDA), National Fluid Power Association (NFPA), National Association for Hose & Accessories Distribution (NAHAD), Power Transmission Distributors Association (PTDA) and other associations and buying/marketing groups. Our experts have spoken at many industry conferences and have written articles in the Fluid Power Journal, Hydraulics and Pneumatics, and other industry publications. Additionally, as Epicor strives to provide fluid power distributors with the best solutions to help them meet their needs, we regularly seek out the input of our power customers in the development of our solutions and services.

Functionality

- Quotes and Orders
- Front Counter
- Order History/Previous Requests
- Customer-Specific Pricing
- Contract Pricing
- Serial and Lot Tracking
- Production Orders and Manufacturing
- Hose Assemblies
- Internal Routing and Offsite Secondary Processing
- Rebate Management
- Manufacturer's Rep Orders
- Service and Maintenance
- Proof of Delivery
- Inventory Control





In Your Industry

As a fluid power distributor, your business processes are unique, and you need a business system that can help solve the challenges you face every hour of the workday. Just after opening, customers may rush your front counter for a replacement hose. By mid-afternoon, your production team is finishing up a large pump assembly for an important customer. Throughout the day you pick, pack and ship everything from hoses, fittings, hydraulic pumps, manifolds, and gauges. 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 system that’s designed around your needs.

A Comprehensive Solution

With more than a half-century of experience, Epicor helps distributors grow sales, improve margins, and increase productivity with enterprise resource planning (ERP) systems that help keep them

healthy and thriving in today’s highly competitive marketplace. Epicor Prophet 21 Software is a leading ERP solution for wholesale distributors that combines proven distribution expertise with a web-enabled infrastructure and modern technology stack. Cloud and on-premises deployment options are also available. Distributors can start with the on-premises version and easily migrate to the cloud as their needs change.

Prophet 21 Software enables your most critical business areas to work more efficiently with features that include:

- 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

You need a technology provider that understands fluid power distribution. You must also choose a business partner with a vision to help guide you into the future—Epicor offers both. When you partner with Epicor, you can expect leading technology solutions and professional services, as well as the industry-specific functionality you need to drive growth for your business.

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. You can:

- 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 solution for faster processing—eliminating manual work and 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 front counter tools necessary to quickly and efficiently handle that early morning rush. You can help any customer on the spot by accessing your entire 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, items can be manually entered or scanned using a wireless or USB bar code scanner. Customer credit can be checked on the fly, and notifications can be sent immediately to the credit manager in the event of an exception. Payments can also be entered on the transaction—including the ability to accept cash, check, or credit card payments. 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 fully integrates with the Prophet 21 Order Entry module to instantly provide you with a permanent record of what left the warehouse, when, and with whom.

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 that allows 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 old 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 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. This helps ensure 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.

Serial and Lot Tracking

Epicor Prophet 21 Software allows you to record the serial numbers on everything in your warehouse and have flexibility in how you track this information. For example, you can record item serial numbers as they enter your business to produce detailed inventory reports. You can also choose to group all items manufactured at the same time together—or you can assign lot numbers at the point of sale.

Production Orders and Manufacturing

Manufacturing functionality enables you to list items like fully assembled hydraulic pumps in your solution—at one price with one item code. This eliminates the need to reenter a long list of line items each time you sell and assemble the products. You save time for order-entry personnel, prevent costly errors, and reduce or eliminate mix-ups. Customer service representatives can also increase sales by up-selling

assembled or manufactured products when customers request groups of items.

The same functionality also takes the guesswork out of determining how many items or kits you can assemble with the items you have in stock. When a customer calls to request an item with more than one part, the solution searches your database, finds all the components necessary to manufacture a kit or assembly, and calculates the least common denominator of these pieces. In seconds, customer service representatives know exactly how many of a kit they can offer your customers—without taking a walk to the warehouse to manually find and count SKUs.

Hose Assemblies

Managing and assembling products like custom hoses can be a labor-intensive process, and Epicor offers a time saving solution. Tracking the depth of the fitting that covers the hose (cut factor), tells you how much hose you need for each complete assembly.



For example, if a customer requests a 24-inch hose assembly with 2-inch couplings, the solution will factor in the length of the couplings and direct your employees to cut a 20-inch piece of hose.

The solution also includes an assembly decoder, in which you can keep records of master item assemblies complete with the different optional components you need to complete each assembly. Simplify the process by allowing your employees to select only the appropriate component for each piece from a pop-up menu.

Internal Routing and Offsite Secondary Processing

Fluid power distributors regularly send stock items out of the warehouse to be assembled or reworked to meet customer requests. Prophet 21 Software can keep track of these items to improve customer service, increase efficiencies, and capitalize on business opportunities. For example, if you send the components of a pump out of the office for assembly, Epicor Prophet 21 will track purchase orders, costing, and quantities, as well as how long the inventory is off your premises—allowing for better inventory control. Manage inventory sent for secondary processing through a work in progress account. This helps in tracking inventory for financial and inventory evaluation.

Rebate Management

Many top vendors offer rebates that help distributors maximize profits. Robust rebate functionality helps you manage these rebates

and take advantage of anything your manufacturers might offer. You can track vendor rebates electronically for more accurate books and a healthier bottom line. Simplify the often-tedious task of handling vendor rebates by 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 you track the rebates you've 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. You'll arm your staff with the accurate, concise information they need to send to vendors to claim rebates.

Manufacturer's Rep Orders

No matter what you call it, 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.

Service and Maintenance

This module helps distributors automate the service and maintenance process and more quickly and effectively meet their customers' needs. Service and maintenance 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 automated processes.

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.

Proof of Delivery

Epicor Mobile Proof of Delivery is a fully integrated mobile companion for your Epicor system. It provides new levels of service responsiveness for efficient deliveries and pick-ups. With your choice of mobile device, you can help ensure accurate deliveries while providing reliable, documented drop-offs and pick-ups.

Mobile Proof of Delivery puts virtually every delivery detail in the palm of your driver's hand. Drivers can efficiently complete their delivery tasks using GPS location maps for fast, accurate service.



From their mobile device, drivers can also add important delivery notes or log issues—keeping your customer and business informed of delivery details.

Inventory Control

Excellent inventory control is vital to the health of your business. Tracking your inventory effectively is key to maintaining good customer service and manageable stock levels. Strong inventory management capabilities help you meet these service levels without investing too many valuable dollars in stock. Plus, it's the nature of the industry—certain items go in and out of style or are regularly replaced by newer, more innovative products. Prophet 21 Software lets you track customer buying trends, so you always know whether to stock extra items or replace them with something newer. This helps ensure that you keep the right items on your shelves at the right time— and reduces the chance of today's investment becoming tomorrow's dead stock.

Technology That Enables Transformation

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

Prophet 21 Software combines proven distribution expertise with an end-to-end, 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 fluid power 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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