



Epicor Prophet 21 for Jan/San Distributors

Functionality

- ▶ Quotes and Orders
- ▶ Front Counter
- ▶ Order History/Previous Requests
- ▶ Customer-Specific Pricing
- ▶ Contract Pricing
- ▶ Order Price Based on Margin of Last Sale
- ▶ Accessory and Substitute Items
- ▶ Proof of Delivery
- ▶ Document Links
- ▶ MSDS
- ▶ Serial Number Tracking
- ▶ Lot Tracking
- ▶ Rebate Management
- ▶ Service and Maintenance

Jan/San Distributors

Today's leading Jan/San distributors—including Keller Meyer Company, Sheppard Enterprises, Brady Industries, and Royal Paper Corporation—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 United Group (TUG), Network Services, Distributor Partners of America (DPA), International Sanitary Supply Association (ISSA), and many others. Additionally, because Epicor desires to provide Jan/San 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 solutions and services.

In Your Industry

As a Jan/San distributor, your business processes are unique, and you need a software system to help solve the challenges you face on a daily basis. You need to be able to process front counter orders quickly and easily—including the ability to process credit cards. For orders over the phone, your salespeople need to see a list of each customer's regularly ordered items and have the ability to quickly select an item and enter the quantity to add it to the order. Additionally, you need to be able to track customer-specific pricing—including contract pricing and pricing based on the margin of the last sale. Some customers will want to order on their own. For those customers, you'll need to offer a user-friendly eCommerce site. You'll also need tools to allow your staff—especially sales—to work remotely via a tablet or smartphone. At the end of the day, you need an industry-leading system designed around your business 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 can keep them healthy and thriving in today's highly competitive marketplace. Epicor Prophet 21 is a leading ERP solution for Jan/San distributors. It combines proven distribution expertise with an end-to-end, web-enabled infrastructure and modern technology stack. Cloud and on-premises deployment options are available—allowing distributors to start with the on-premises version and easily migrate to the cloud as their needs change.

Prophet 21 can enable 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 Jan/San 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 your business forward.

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 enables you to complete the entire order entry process from one screen—allowing you to:

- ▶ 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 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 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 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 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 enables you to set up time-sensitive contract pricing for these customers. Contract pricing is fully integrated in Quote/Order Entry to 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.

Order price based on margin of last sale

On some occasions, you'll need to edit the price of an item during order entry, and you may want to sell that item using the same margin going forward. Prophet 21 allows you to base the price on the margin of last sale. When enabled, Prophet 21 will price the new order to maintain the gross profit percent from the prior invoice—even if the cost has increased. Additionally, if cost decreases, you have the option to maintain the current price.

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 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 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 ensures that you will never turn customers away because products are out of stock.

Proof of Delivery

Epicor Mobile Proof of Delivery is a fully integrated mobile companion for your Epicor system that delivers new levels of service responsiveness for efficient deliveries and pick-ups. With your choice of mobile device, you can maximize the effectiveness of your delivery resources 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 to ensure reliable and documented deliveries to customers. Drivers can efficiently complete their delivery tasks using GPS location maps for fast, accurate service. From their mobile device, drivers can add important delivery notes or log issues—keeping your customer and business informed of delivery details.

Document Links

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

Prophet 21 document links allow you to connect maintenance and transaction records to any file on your network—from vendor invoices and customer purchase orders to specifications and Material Safety Data Sheets. You can even scan and save handwritten letters and faxed communications in the system 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, your employees can simply click on a link to those documents and send them instantly.

MSDS

Some distributors sell hazardous items that require a Material Data Safety Sheet (MSDS) be provided to the customer. This can be a time-consuming process that requires employees to find the current MSDS for an item and make a copy for the customer. To streamline this process, Epicor Prophet 21 has integrated MSDS functionality—allowing you to indicate that an item requires an MSDS sheet and linking the item to the MSDS sheet. Doing so causes Prophet 21 to automatically print the MSDS sheet immediately after a packing list containing the item for all items being sold to a customer for the first time and items whose MSDS sheets have been revised since the last time they were sold to that customer.

Serial Number Tracking

Important for recalls and record-keeping purposes, tracking serial numbers can be a big part of your business. Prophet 21 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.

Lot Tracking

Tracking item lots from origin through final shipment is a critical task that 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 simplifies lot tracking by making it easier for distributors to manage the most complex products and processes.

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

Some customers—like those in the aerospace, automotive, and medical 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 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.

Rebate Management

Many top vendors offer rebates that help distributors maximize profits. Robust rebate functionality helps you manage these rebates and ensures you have the ability to 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 ensures 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. With Prophet 21, you'll have the accurate, concise information you need to send to vendors to claim your rebates.

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. 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 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 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 business. Epicor Prophet 21 is designed to help your distribution business scale, change, and grow without major system modifications.

Prophet 21 combines proven distribution expertise with an end-to-end, web-enabled infrastructure and modern technology stack that includes HTML5, Angular JS, .NET, and Microsoft® 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 can help you grow your distribution business by contacting Epicor today.



About Epicor

Epicor Software Corporation drives business growth. We provide flexible, industry-specific software designed to fit the precise needs of our manufacturing, distribution, retail, and service industry customers. More than 45 years of experience with our customers' unique business processes and operational requirements are built into every solution—in the cloud or on premises. With this deep understanding of your industry, Epicor solutions dramatically improve performance and profitability while easing complexity so you can focus on growth. For more information, [connect with Epicor](#) or visit www.epicor.com.

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