

EPICOR

Integrated Business Planning (IBP) with Epicor Solutions



+ CROSS-INDUSTRY

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Introduction

Unlock your business's full potential with Epicor advanced planning capabilities across all functions. By leveraging Integrated Business Planning (IBP) practices powered by Epicor technology, you can align your business goals with operational planning throughout various departments. This unified approach not only drives business performance and agility—it also enhances decision velocity, enabling your organization to respond swiftly and effectively to changing market conditions.



What is Integrated Business Planning (IBP)?

Integrated Business Planning (IBP) is a strategic process that aligns an organization's business objectives with its operational and financial plans, helping ensure cohesive decision-making and optimized performance. It extends traditional sales and operations planning (S&OP) by integrating all necessary functions—including finance, supply chain, sales, and marketing—into a single, unified plan.

IBP Solves These Important Challenges

Data Silos: Different departments often use separate systems and data sources, leading to inconsistencies and inaccuracies in planning.

Forecasting Accuracy: Inaccurate demand forecasts can lead to excess inventory or stockouts, impacting service levels and profitability.

Operational Efficiency: Disconnected planning processes can result in inefficiencies, higher costs, and missed opportunities.

Change Management: Traditional management policies require complicated processes, systems, and an organizational culture well-versed in adaptation.

Real-Time Data Visibility: Lack of real-time data access can hinder timely decision-making and responsiveness to market changes.

Epicor Creates a Powerful IBP Ecosystem

Epicor's suite of solutions, including Epicor ERP, Grow Data Platform, Grow BI, FP&A, IP&O, Automation Studio, Epicor Collaborate, and Epicor Prism, embodies the principles of IBP by providing integrated tools that align financial, operational, and strategic planning. You'll benefit from sensible data flow, real-time visibility, and collaborative planning across the organization.

Key Products and Features:



1. Epicor FP&A



- **Reporting & Analysis:** Generate comprehensive financial and non-financial reports with customizable templates and real-time data. Support for web and Excel interfaces allows you to create and customize reports easily.
- **Drill-to-Details:** Drill down to transaction details and invoice trackers for deeper insights. Powerful drilling to periodic postings and invoices provides greater transparency.
- **Financial Forecasting:** Predict future financial performance accurately using advanced forecasting models. Easily create and compare forecasts, track forecast errors, and identify exceptions for continuous improvement.
- **Consolidation:** Automate the consolidation process, including currency translations. Align multiple entities based on key performance metrics with unlimited what-if analysis.

2. Epicor IP&O



- **Demand Forecasting:** Forecast demand using AI-driven models that auto-select optimal methods and leverage probabilistic forecasting. Account for trends and seasonality right out of the box.
- **Stocking Policy Optimization:** Optimize inventory processes to reduce excess stock and prevent stockouts. “What-if” planning predicts KPIs for different inventory policies.
- **Integration with ERP:** Seamlessly integrate with your ERP system and extend its capabilities for unified inventory management. Re-calibrate stocking parameters more often for better returns on inventory assets.
- **User-Friendly Interface:** Enjoy an intuitive and easy-to-use web interface for managing inventory. Easily compare statistical, customer, and sales forecasts.

3. Epicor Automation Studio



- **Workflow Automation:** Design and deploy automated workflows to enhance operational efficiency. Epicor Automation Studio, powered by Workato, allows you to streamline business operations by automating repetitive tasks and integrating various systems.
- **System Integration:** Connect and integrate various systems and applications seamlessly. With over 1,000 connectors and 500,000 community recipes, you can easily integrate your Epicor solutions with third-party applications.
- **User-Friendly Interface:** Utilize a drag-and-drop interface to easily create and manage automation processes. The low-code/no-code platform empowers both technical and non-technical users to build and deploy workflows.



4. Epicor Prism (Kinetic and Prophet 21 Only)

Data Analytics: Analyze large datasets to uncover patterns and insights. Epicor Prism uses AI to transform your ERP data into actionable insights, enhancing decision-making processes.

Machine Learning: The algorithms of machine learning enable you to predict outcomes and optimize strategies, while the AI capabilities of Epicor Prism help automate tasks while improving efficiency.

Integration: Effortlessly integrate with other Epicor solutions for a unified analytics experience. Epicor Prism is fine-tuned to the Epicor data structure, helping ensure smooth connections and valuable insights.

5. Grow Data Platform



- **Data Integration:** Seamlessly integrate data from various sources, including ERP systems, CRM, and other business applications, into a synchronized platform.
- **Data Management:** Efficiently manage and organize your data, helping ensure it is clean, accurate, and accessible.
- **Advanced Analytics:** Utilize advanced analytics tools to gain insights from your data, so that you can make effective, data-driven decisions.
- **Scalability:** The platform is designed to handle large volumes of data, making it suitable for businesses of all sizes.

6. Grow BI



- **Interactive Dashboards:** Create interactive dashboards that provide real-time insights into your business performance.
- **Customizable Reports:** Generate customizable reports that meet your specific business needs, allowing you to track key performance indicators (KPIs) effectively.
- **Data Visualization:** Visualize complex data in an easy-to-understand format, helping you identify trends and patterns quickly.
- **Collaboration:** Share insights and collaborate with team members easily, helping ensure that everyone is on the same page.

7. Epicor Collaborate



- **Real-Time Communication:** Facilitate real-time communication across your organization, improving teamwork and productivity.
- **Task Management:** Manage tasks and projects effectively, working together so that deadlines are met and projects are completed on time.
- **Document Sharing:** Share documents and files securely, so that all team members have access to the information they need.



Seamless Solution Integration with Epicor ERP

Operating as the “home base” for IBP, our multi-faceted suite of Epicor ERP systems—Kinetic, Prophet 21, BisTrack, LumberTrack, Vision, and Eagle—can accelerate your enterprise. Each product is tailored to match your specific needs, and all have the same powerful capabilities:

- **Comprehensive Functionality:** Epicor ERP systems offer a wide range of modules covering finance, supply chain, manufacturing, project management, and more, helping to integrate and streamline all business processes.
- **Scalability:** Designed to grow with your business, Epicor ERP systems can scale from small businesses to large enterprises, adapting to your evolving needs.
- **User-Friendly Interface:** With an intuitive and modern interface, Epicor ERP systems reduce the learning curve while increasing user adoption.
- **Real-Time Data:** Access real-time data and analytics to make informed decisions quickly and accurately.

Epicor solutions integrate with various Epicor ERP systems. This integration gives you a unified platform for financial and inventory planning, automation, and analytics, supporting a comprehensive IBP approach.

Key Benefits for Implementing IBP:



- **Unified Platform:** Integrate FP&A, IP&O, Automation Studio, Grow Data Platform, Grow BI, Epicor Collaborate, and Prism with your ERP system for a comprehensive business management solution.
- **Enhanced Efficiency:** Streamline operations and improve efficiency with integrated planning and automation tools.
- **Data-Driven Decisions:** Leverage advanced analytics and machine learning to make informed, data-driven decisions.
- **Scalability and Flexibility:** Grow your business operations with flexible and scalable solutions that adapt to your needs.

Amplify Your ERP's Capabilities with Epicor Solutions

Epicor FP&A, IP&O, Automation Studio, Grow Data Platform, Grow BI, Epicor Collaborate, and Epicor Prism are designed to help businesses achieve greater efficiency and accuracy in financial planning, reporting, inventory management, and automation. By integrating these powerful tools with your existing ERP system, you can make data-fueled decisions efficiently, optimize operations, and drive growth.

Embrace the power of [Epicor advanced solutions](#) to transform your business and achieve operational excellence through Integrated Business Planning.



We're here for the hard-working businesses that keep the world turning. You're the companies that make, move, and sell the things we all need. Trust Epicor to help you do business better. Your industry is our industry, and we understand you better than anyone. By working hand-in-hand, we get to know your business almost as well as you do. Our innovative industry solution sets are carefully built to fit your needs and respond flexibly to your fast-changing reality. We accelerate ambitions, whether you want to grow and transform, or simply become more productive and effective.

That's what makes us the essential partner to the world's most essential businesses.

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