

Advanced Requisition Management (ARM) Brochure



Gain visibility and take control of your spend by streamlining your entire procurement process with Advanced Requisition Management for Epicor Kinetic

Stay on budget and manage spend limits with automated processes and flexible multi-dimensional approval workflows

"Epicor Advanced Requisition Management enables us to keep tight control over capital and operational expenditure. More importantly it has improved process efficiencies, optimized inventory levels, and reduced costs right across our organization."

David Fisher

Executive Manager, Business Services
Juniper



In today's economy there is no room for waste and inefficiency. Success is about reducing costs as much as it is about increasing revenue. Keeping tight control over capital and operational expenditure is a critical priority for any organization.

The key to efficient controlled spending lies in the ability to empower staff with requisitioning responsibilities whilst supporting that contracted buying agreements and spending limits are enforced, with requisitions routed to the relevant individuals for approval in a timely manner.

This control needs to be streamlined to avoid extra steps and lengthy processes.

With its budget and receiving tolerance checking, ability to help provide more flexibility in requisitioning materials for jobs and a flexible approval and notification workflow engine, Epicor Advanced Requisition Management (ARM) streamlines and automates the entire procurement process – increasing efficiency and communication, enforcing control and driving down costs throughout your organization.

Intuitive Buying Experience

- Requestors can quickly and easily create purchase requests using a familiar online buying experience.
- Items can be added from your ARM product catalog, your Kinetic inventory master or direct from a supplier's website using PunchOut.
- Support for your preferred suppliers and pricing agreements help ensure you're always buying from the right supplier at the right price.

Flexible Requisition Types

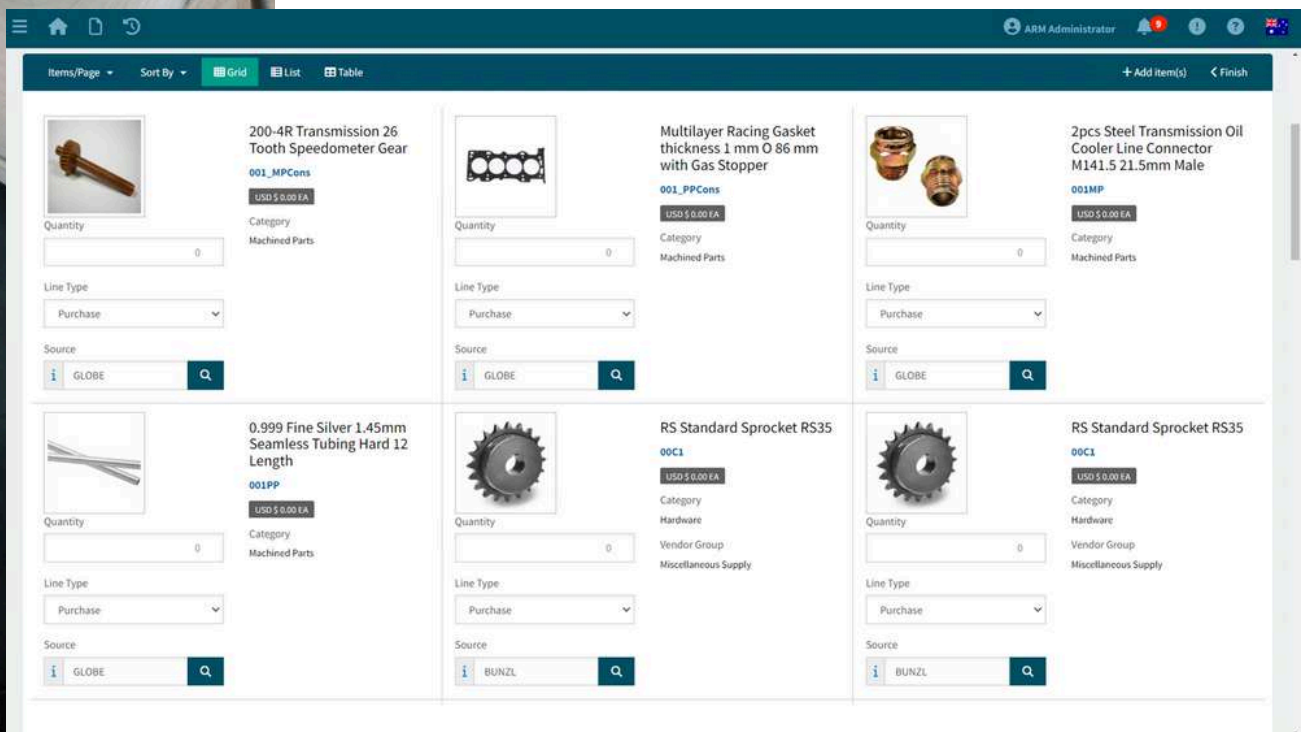
- Increase the spend categories under control with multiple, configurable requisition and order types.
- Project details can be added to requisitions to enable visibility of project budgets and improve control over project spend.
- Create your own custom forms to capture additional information from the requestor to aid approvals and decision making.

Support for Preferred and One-Time Vendors

- If pricing arrangements have been made with your suppliers, ARM helps ensure these prices are utilized via Preferred Suppliers for Catalogue and Inventory items.
- No need to set up new vendors for one-off purchases, as this is easily managed within ARM and integrated to Accounts Payable.

Real-Time Budget Checking

- Automatically check the requisition amounts against the GL or a Project Budget linked to all non-inventory Catalogue and Non Catalogue items for any ARM users required to follow GL Budget checking, real-time for every step along the approval chain.
- If over budget, the user will be alerted visually in ARM, however the requisition can still be submitted and the approver can decide on the action to take.



The ARM Product Catalog offers a simple and intuitive buying experience

Powerful Multi-Dimensional Approval Workflows

- Design approval workflows to your exacting needs based on role, approval limits, and multi-dimensional data attributes from the requisition header and lines
- Gain real-time visibility into the status of every requisition line at every stage of the approval process

Notifications, Escalations & Delegations

- Minimize oversights and delays with automated notifications on approvals and escalations for overdue tasks
- Empower team members to delegate approval tasks to colleagues when necessary, promising smooth and uninterrupted workflows even during absences or periods of high workload.

Purchase Orders & Goods Receipt Management

- Automatically create and send Purchase Orders once a Requisition has been approved.
- Consolidate multiple purchase requests to a single PO to take advantage of quantity breaks or adhere to contract obligations.
- Empower your employees to quickly and easily acknowledge goods receipts, without having to access your Kinetic system.

Single Procurement Platform for Epicor Kinetic

- Streamline your entire requisition-to-receipt process on a single platform that offers intelligent automation and a simplified, consistent user experience.
- Epicor ARM enables seamless integration with your Kinetic system, with over 50 touchpoints across configuration, transactions, and master data.

The screenshot displays the Epicor ARM Requisitions interface for requisition R000440. The interface includes a navigation sidebar on the left with options like All Requisitions, Saved, Submitted, Approval, Standing Orders, Templates, RFQs, PO Suggestions, PFOs, BLPFOs, PO Creation, POs, Receiving, Transfers, Search Attachments, AP Invoices, OCR Dashboard, Integration, and Administration. The main content area shows the requisition details, including Requisition Name, Requisition Type (Standard), Location Code (EPICOR-CHI), Release Date (Multi/yyyy), Due Date (3/19/2023), Buyer (ARMBuyer), and Actions (Defaults, Delivery, Submit). Below this is a table of Line Items with columns for Item #, Name, Vendor/Supply Loc., Quantity, UOM Code, UOM, Unit Cost, On Order, GL Account, and Budget. A budget summary box shows: Account 6000-00-00, Budget: USD \$10,000.00, Used: USD \$18.25, Remaining: USD \$9,981.75, and This Requisition: USD \$612.20. The interface also shows a list of line items with details like item numbers (00C1, AN352/B, MAS, PRMFNELB/2), names, vendors (BUNZL), quantities (10), UOM codes (EA), and unit costs.

Epicor Advanced Requisition Management is available for both on-premises and cloud deployment

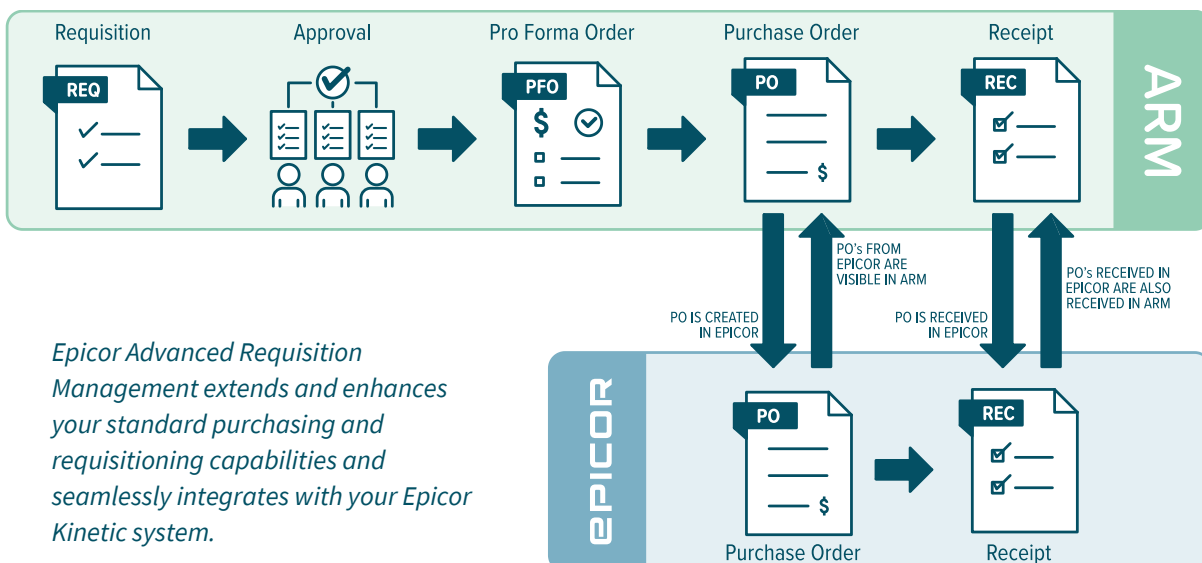


Seamless Integration with Kinetic

Advanced Requisition Management is designed to extend and enhance the requisition and purchasing capabilities within Kinetic.

With comprehensive, real-time integration, it offers your employees a seamless experience when it comes to the Kinetic data that ARM uses and the transactions it creates.

- All or part of the inventory items can optionally be available in the ARM catalogue.
- Purchase requests can be processed for jobs and projects that exist in Kinetic.
- Non-inventory requests for goods and services are linked directly to GL accounts, including budgets and GL splitting ability.
- Kinetic suppliers and preferred suppliers are supported including integration with their online catalogue or web store.
- Multiple location and multiple company requisitions are supported.
- Purchase Orders, Transfer Requests, Receipts and Accounts Payable Invoices are automatically generated within Kinetic.
- Purchase Order suggestions generated in Kinetic are visible in ARM, and requisitions can be initiated directly from the suggestions list.



"The biggest advantage of choosing Epicor ARM is the immense time savings"

Michael Walker, Financial Controller, Crown Media Family Networks

Flexible Deployment Options

When it comes to software deployment options, modern businesses need to prioritize agility and cost-effectiveness. Epicor Advanced Requisition Management (ARM) SaaS delivers both, streamlining your procurement process with a cloud-based solution that seamlessly integrates with your existing on-premise or cloud Kinetic system.

With ARM SaaS, you can focus on what matters – your business!

- **Faster Results:** Rapid deployment minimizes disruption and gets you up and running quickly.
- **Scalability & Flexibility:** Easily adapt your service as your business grows and evolves.
- **Reduced Costs:** Eliminate upfront infrastructure investments and ongoing maintenance fees.
- **Automatic Updates:** Always benefit from the latest features and security patches.

ARM SaaS is a fully managed cloud solution securely hosted in Microsoft Azure™ data centers worldwide, facilitating optimal performance and peace of mind.

Need On-Premise Flexibility? We've Got You Covered.

ARM can also be deployed on-premise for businesses with specific IT requirements. Whether you choose cloud or on-premise, ARM seamlessly integrates with your existing Epicor Kinetic environment.



Optional modules to further extend your procurement process

Epicor Advanced Requisition Management offers two optional add-on modules* that give you greater flexibility in managing your procurement operations, from one system.

1. **Supplier PunchOut** allows you to connect and request items directly from an external supplier's e-commerce website, which are ultimately exported back into a requisition within your Epicor system.
2. **Inventory Transfers** allows for the creation of internal requests for transferring and expensing inventory items, with the necessary financial transactions automatically generated to help ensure your inventory maintains accuracy.

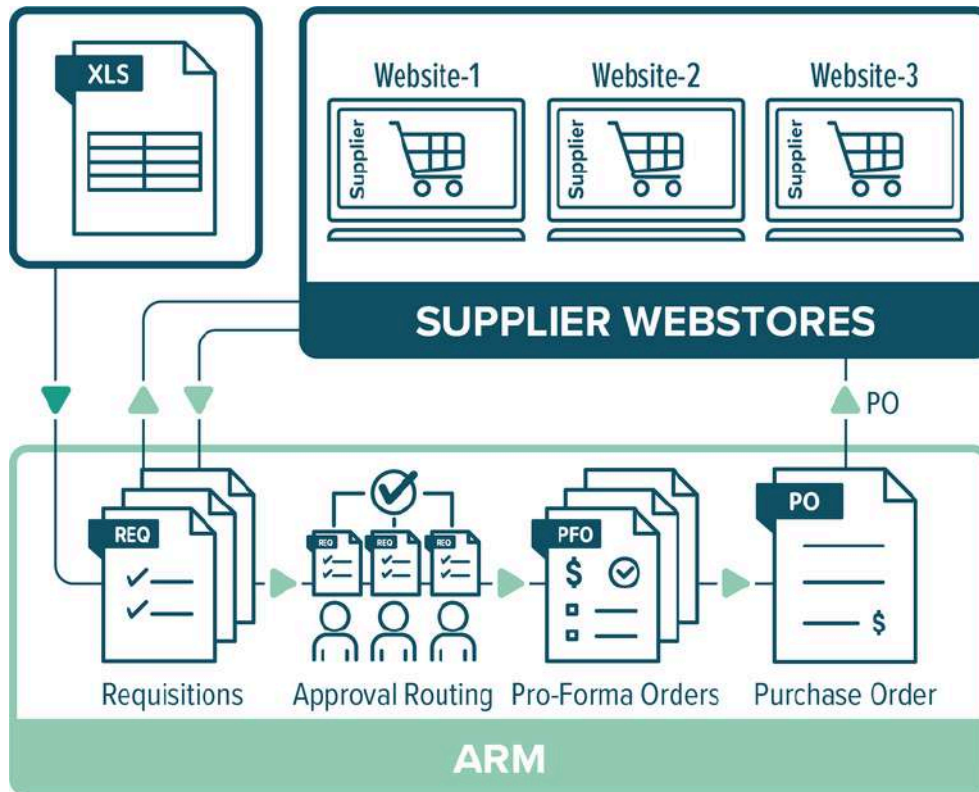
* each optional module requires separate licensing

ARM Supplier PunchOut

The External Integration Suite module allows the user to 'PunchOut' from their ARM requisition directly onto a supplier's online, eCommerce site. Once connected, the user will have visibility of the most up-to-date information regarding the supplier's items - including stock availability and contracted pricing. The user can intuitively add items to their shopping cart. Upon checkout, the website closes, the cart empties and the contents of the cart now populate as ARM requisition lines - complete with an accurate description, SKU and pricing - ready for submission and approval through ARM.

ARM requisitions can feature a mixture of catalogue lines, supplier website basket items, purchase, transfer and expense request lines all on the same form. This means a user can add everything they need onto a single requisition, irrespective of supplier or location, all without affecting the processes that users, approvers or your procurement team follow.

- Access or 'PunchOut' to a supplier's web store and add items to the supplier's shopping cart.
- Upon checkout, the shopping cart empties and items are exported back into the ARM requisition, ready for approval and subsequent Purchase Order to the supplier.
- External Integration Suite also supports the importation of requisition detail via a templated .csv file. Requisitions could potentially be compiled outside of ARM (or within another system) and then imported/routed through ARM's best-in-class approval workflow.



Creating requisitions from the suppliers external eCommerce site shopping cart easily with tSupplier PunchOut.

How do Punch Outs work in Advanced Requisition Management?

Click to add Item(s) from your configured PunchOut website to this requisition

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To punch out, simply click on the 'Punch Out' button to display a list of suppliers that ARM has been connected to.

Shopping Cart

Item	Shipping	Qty.	Price
Office Depot® Business Multi-Use Printer & Copy Paper, White, Letter (8.5" x 11"), 5000 Sheets Per Case, 20 Lb, 92 Brightness, Case Of 10 Reams Item # 6028288 Entered Item # 6028288	Delivery In-store pickup not available. Estimated delivery 1-3 business days	1	\$40.99 \$40.99 carton
Just Basics® Wirebound Notebook, 8" x 10 1/2", 1 Subject, Wide Ruled, 70 Sheets, Assorted Colors, Pack Of 6 Item # 293799 Entered Item # 293799	Delivery In-store pickup not available. Estimated delivery 1-3 business days	2	\$19.78 \$9.89 pack
BIC Round Stic Ballpoint Pens, Medium Point, 1.0 mm, Translucent Barrel, Black Ink, Pack Of 12 Item # 423582 Entered Item # 423582	Delivery In-store pickup not available. Estimated delivery 1-3 business days	2	\$2.20 \$1.10 dozen

Add items to your cart on your supplier's online store then simply checkout

Requisition Name: Stationery Order

Location Code: EPIC06-CHI

Release Date: d/MM/yyyy

Due Date: 7/05/2024

Urgent
 Auto Send

Total Exc Tax USD \$62.97

#	Item	Vendor / Supply Loc.	Receive Loc.	Quantity	UOM Code	UOM	Unit Cost	On Order	GL Account	Status	Options
1	Office Depot(R) Business M	DEPOT	EPIC06-CHI	1	EA	Single Unit	40.99	0	1530-00-00	Tab. Acc. Budget Cl.	
2	Just Basics(R) Wirebound I	DEPOT	EPIC06-CHI	2	PK	Package	9.89	0	1530-00-00	Tab. Acc. Budget Cl.	
3	BIC Round Stic Ballpoint Pi	DEPOT	EPIC06-CHI	2	EA	Single Unit	1.10	0	1530-00-00	Tab. Acc. Budget Cl.	

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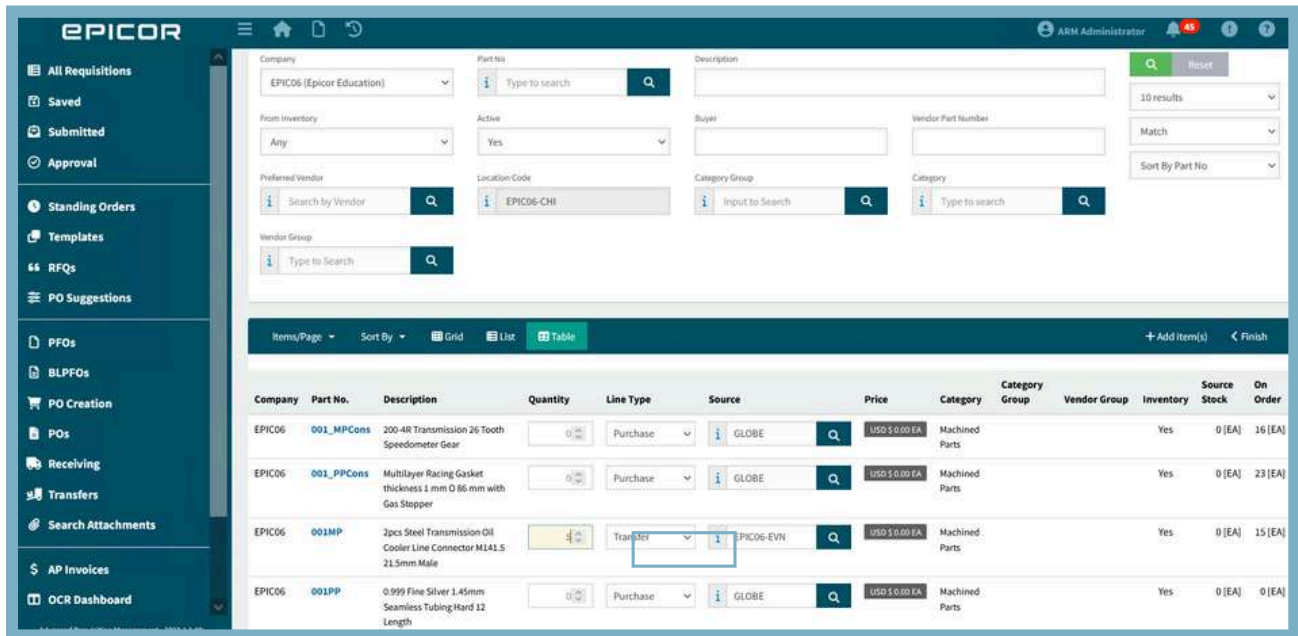
Items from your shopping cart are automatically added to your requisition

ARM Inventory Transfers

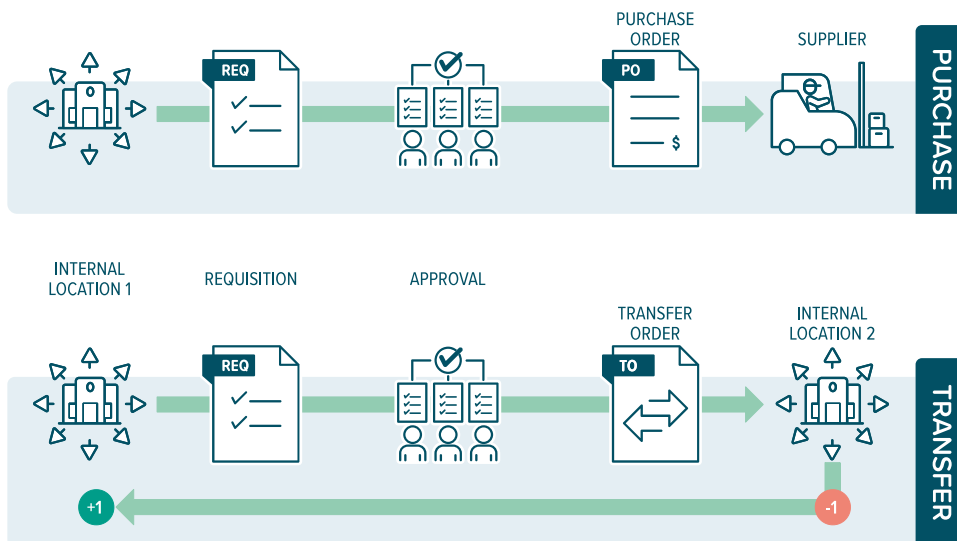
Sometimes an external purchase request isn't required because you have stock in another location. Take the guess work out of the process by letting ARM check stock in other locations and create an internal transfer request which can be shipped and received with ARM, along with all the necessary adjustments.

This module also allows requests to be raised and approved for expensing items - useful where items are to be consumed or 'written-off' once obtained. Once approved, an expense transaction is automatically generated, and inventory adjusted accordingly.

- Determine whether material is to be requisitioned from another location or purchased from a supplier and whether it should go into stock or be automatically expensed upon receipt.
- Requisitions automatically generate a transfer request in Kinetic after approval.



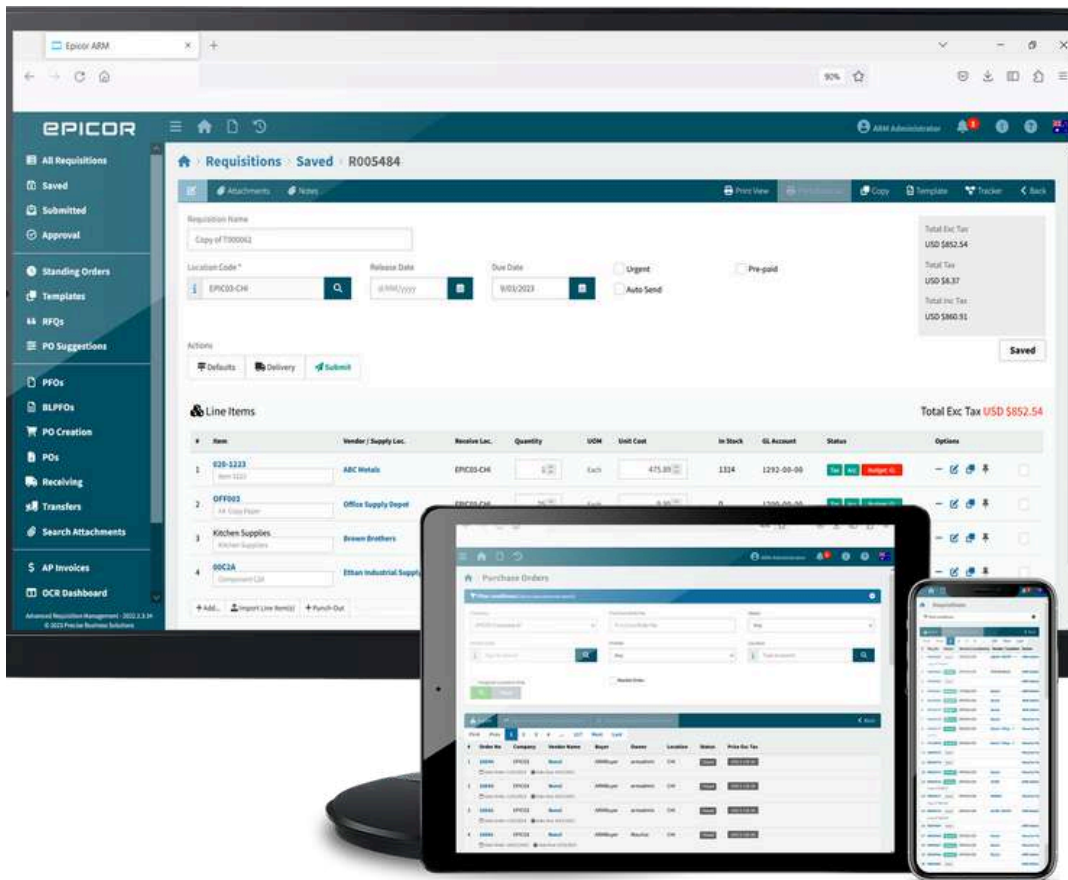
Easily create a transfer of inventory keeping your stock levels accurate.



Streamline your internal transfer processes with Epicor Advanced Requisition Management Inventory Transfer Module.

How procurement automation can optimize your business

- Greater control and visibility of business spend and the procurement process.
- Elimination of time-consuming and non-value-adding manual steps.
- Standardized workflows and approvals across the organization.
- Automation of discrepancy management and budget checking to stay on track.
- Compliance to preferred suppliers and pricing contracts.
- Faster sourcing of materials, goods and services.
- Less non-preferred suppliers means less risk and greater cost savings.
- Better handling of low-dollar purchases to free up time for managers.
- Electronic processing for faster results and less paper management.



EPICOR

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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