**EPICOR**

# Epicor Data Analytics

## Achieving New Levels of Business Insight

Epicor Data Analytics (EDA), powered by Phocas®, helps companies turn their data stored in Prophet 21 or Eclipse into actionable insights. Non-technical users have instant access to data, taking them from easy-to-read dashboards to lightning-fast grids to detailed transactions in a few clicks or taps. With deeper insights into potentially massive amounts of their current and historical data, companies can grow by reducing cost, identifying new opportunities, supporting specific programs, and speeding up decision-making.

EDA is an easy-to-use service in the cloud that can quickly start contributing to your business while helping you avoid error-prone approaches such as spreadsheets and manual calculations that often waste time and resources. It also stays up-to-date with the daily changes of your business and can send you an email when any conditions meet your "red" or "yellow" alert level settings.

EDA provides customizable and interactive dashboards to make it easy to analyze the data inside your business systems. The dashboards provide visual graphs, charts, and tables, so you can quickly review important information about your business performance and make informed strategic decisions. The EDA grid is where you conduct most of your analysis, and unlike a spreadsheet, you can "drill down" into the data with a simple click to reveal additional levels of detail.



*Epicor Data Analytics—example of an Executive Dashboard*

### Prophet 21 Eclipse

**Benefits**

**Grow your business with deeper insights into:**

Productivity and margins

New business opportunities

**Use content packs to:**

Better visualize inventory usage

Monitor profit growth

Drill down into lines on the income statements

Maximize inventory effectiveness

Discover customer buying trends

Examine vendor performance

Better visualize cash flow

EDA is a comprehensive end-to-end service delivered and supported by Epicor. It is fully integrated with Prophet 21 and Eclipse, using your data to provide a broad understanding of your business performance. In addition to logging into EDA dashboards, your co-workers have the options of seeing a live data display via your published public internal dashboard URLs or alternatively, they can login into and explore an embedded view received via email or in a webpage from you. With EDA, you also have responsive mobile access to your data, so you are never disconnected from your information. "Always connected" means you can respond quickly to the needs of your business and keep your organization highly productive. As a cloud-based service, EDA minimizes cost impacts on your current system hardware, software, and maintenance budgets.

## Included Content Packs

EDA is a complete solution that comes with ERP-specific content "out of the box." Each of the Included content packs provides starter dashboards and deep integration into a specific set of Prophet 21 or Eclipse data. You have the freedom to build onto these content packs with any additional fields from Prophet 21 or Eclipse and augment from any other data sources, such as Salesforce® and ADP®. Having an all-inclusive BI is a huge time-saver when you consider the tremendous amount of work required by the alternative—determining every table and field in Prophet 21 or Eclipse to connect and dashboards to create. Available content packs:

- Sales and CRM* (sales orders, opportunities)
- Financials (AR/AP, general ledger)
- Inventory
- Purchasing
- Wireless Warehouse Management Solution (WWMS)

*CRM and WWMS content packs are currently available only for Prophet 21*

**Sales and Customer Relationship Management (CRM)**
Quickly discover business trends by seeing more detail. Get deeper insight into sales results by account, location, geography, order, etc.

EDA answers these questions about your sales and CRM data:

- What is my average sales and gross margin by invoice?
- Who was buying and is not buying now?
- Where are we succeeding geographically

Specific data exposed includes net sales, quantity shipped, quantity ordered, material cost, fixed burden, variable burden, labor cost, other cost, gross margin, and CRM opportunity by sales rep, territory, prospect, stage, and more.

### Key Features

**Built for Distributors**

**Offers fast implementation**

**Fast, flexible, and easy to learn**
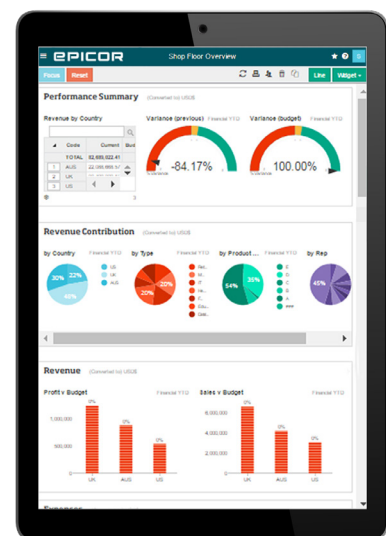
**Based on next-generation analytics**

**Integrated with Prophet 21 or Eclipse plus other data sources of your choosing**

**Keeps you connected with mobile access**

**Delivered as a complete, scalable cloud service—no hardware necessary**

**Does not require Prophet 21 or Eclipse licenses for your users to login to EDA**

**Public Internal Dashboards feature provides a live display link**

*Dashboard on a tablet*

## Accounts receivable

Manage your cash flow better by understanding what receivables are coming in, the customer pay cycles, and the credits customers have received.

**Typical problems addressed:**

- Do any customers consistently pay late?
- How long is money being held up in AR?
- What payments are receivable in the upcoming weeks?

Specific data exposed includes amount, paid, terms taken, allowed, memo amount, bad debt amount, and amount receivable

## Accounts payable

Manage your cash flow better by understanding what payables are coming due, whether you are making the most of vendor payment terms, and what payment discounts have been received over a selected time period.

**Typical problems addressed:**

- Did we take advantage of discount terms and how much did we save?
- Which invoices are nearingthe due date for collecting the discount?
- How much have we spent with a specific vendor by time period?

Specific data exposed includes owing, invoiced, paid, memo, and terms taken.

## General ledger

Improve overall management visibility into the business with drill-down capability into the categorized accounts and transactions inside your income statement and balance sheet.

**Typical problems addressed:**

- What are this year's actuals versus last year's actuals by account?
- Grouping accounts into "types"—employee expenses, facility, vehicle, material expenses—and placing budgets on the groups
- Which accounts are at 90 percent or over their budget?

Specific data exposed includes transactions and reversed transactions for income statement and balance sheet.

## Inventory

Improve the productivity of your largest fixed asset—your inventory—by assuring you put your money into the right inventory mix.

**Typical problems addressed:**

- What is our current inventory value today?
- What are our potential inventory shortfalls?
- What inventory is in which of our locations?

Specific data exposed includes quantity on hand, inventory value, cost, allocated, backordered, on PO, in-transit, and reserved. Monthly inventory and sales snapshots.

## Purchasing

Maximize the effectiveness of your purchase spending and assess how your vendors are performing.
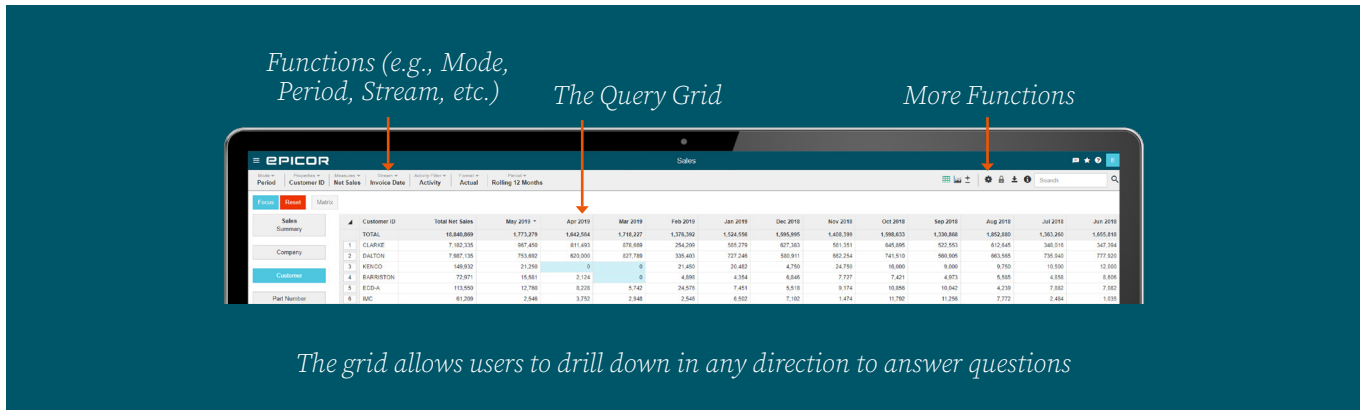
**Typical problems addressed:**

- What is on order on my open POs?
- What delivery lag times am I getting from vendors?
- Have we hit our rebate volumes with our vendors?

Specific data exposed includes quantity ordered, value ordered, quantity received, value received, quantity open, and value open.

## Wireless Warehouse Management Solution

WWMS is a warehouse management system, fully integrated to Prophet 21, that streamlines warehouse processes by allowing your staff to communicate real time with Prophet 21 to accurately scan and record every inventory movement. EDA WWMS content enables analysis of the data associated with receiving, picking, inventory operations, cycle counting, and adjustments.



*Functions (e.g., Mode, Period, Stream, etc.)*     *The Query Grid*     *More Functions*

*The grid allows users to drill down in any direction to answer questions*

## EDA User Types

| EDA User Function | Standard (Full) Named User | Viewer Named User |
|---|:---:|:---:|
| Analyze the data behind the charts | ◆ | |
| Create a dashboard or favorites | ◆ | |
| Export information from a favorite | ◆ | |
| Publish public internal dashboards | ◆ | |
| Share embedded dashboard views | ◆ | |
| Access dashboards shared with the user | ◆ | |
| Filter on information on that dashboard and cross-filter the dashboard to that information | ◆ | ◆ |
| Set a dashboard as the user's homepage | ◆ | ◆ |
| Access favorites that have been shared with the user | ◆ | ◆ |
| Sort the favorites by a column | ◆ | ◆ |
| Have favorites scheduled to be delivered via the email assigned to the viewer license | ◆ | ◆ |
| Have security restrictions applied to the user, which allows one dashboard for multiple user | ◆ | ◆ |

## Requirements

The lightweight SYNC application and one instance of data are stored on a local server with the majority residing in the cloud. Extra disk space is recommended that is 2.5 to 3 times the disk space of the data being loaded to the cloud. The only items required for subscription purchase are a starter pack of five standard (full) named users (plus additional standard (full) named users as desired). The Public Internal Dashboards feature requires a minimum of fifteen EDA standard (full) named users. All other necessary components, such as Prophet 21 or Eclipse content and the SYNC application, are included. EDA Financial Statements and EDA Budgeting and Forecasting are additional modules.

*Public Internal Dashboards warehouse use example*

## 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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