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Implementing Prophet 21

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1 Introduction

Implementing a new enterprise software solution is one of the most challenging projects your business will undertake in its corporate lifetime. To assist you through this project, Epicor developed an Implementation program with a mission to build a partnership between you and Epicor. Epicor works with you to create an organized, systematic, and cost-effective implementation process that allows the flexibility to modify the process to meet your needs. This guide has the following sections:

- Managing Your Implementation Project on page 2.
- Training Your Staff on page 7.
- Implementing Prophet 21 on page 10.
- Developing Custom Software on page 21.
- Ongoing Education and Support on page 22.
- Complementary Software on page 28.

This guide is a roadmap for your implementation that includes each major step of the project. However, this guide does not provide all answers for the unique circumstances that face each company.
2 Managing Your Implementation Project

Project management is planning, scheduling, and controlling project activities to meet your objectives within the time, cost, and scope you communicate to your Implementation Project Manager (IPM). The goal is to balance the time, cost, and scope as shown in the triangle below.

![Time-Cost-Scope Triangle](image)

During the implementation, you may need to adjust your initial requirements for time, cost, and/or scope. Because those elements are in a triangle, changing one affects the other two. For example:

- To reduce the time of your implementation, you must decide how cost and scope will be affected. Do you want to increase cost to keep the same scope or do you want to decrease cost and potentially impact scope?
- To reduce the cost of your implementation, you must decide how time and scope are affected. Do you want to increase the implementation timeline to preserve your desired scope or do you want to decrease time and potentially impact scope?

2.1. Identifying Key Roles

Your implementation will require key project members both from your company and Epicor, including, but not limited to:

- **Your Roles** – Executive Sponsor, Project Manager, System Admin, and Project Team Members.

2.1.1. Understanding Your Roles

**Executive Sponsor**

The Executive Sponsor can be your company's president/owner, vice president, or general manager and is generally a key decision-maker of your company. During the implementation, the Executive Sponsor will empower the end users to decide the best way to implement P21. Also, his/her commitment to the implementation of Prophet 21 is an invaluable resource during the development of this challenging project. Ultimately they are responsible for creating the vision, leading change, and maintaining morale.

Epicor is committed to keeping the Executive Sponsor involved during the implementation process. Therefore, the Executive Sponsor and/or President/Owner/CEO will receive monthly status reports from the IPM. You may also have monthly status meetings with the Executive Sponsor and IPM. In addition, the Executive Sponsor will participate in milestone review sessions and approve each milestone.
**Project Manager**

The Project Manager is your counterpart to the Epicor Implementation Project Manager (IPM) for the duration of the implementation. Your Project Manager will organize resources so that the implementation can be completed on time, on budget, and within scope. This Project Manager must be able to mobilize and assign resources as needed to complete the implementation. In addition, your Project Manager needs an adequate level of decision-making authority that is fully endorsed by the Executive Sponsor.

Your Project Manager ensures the progress of the project through timetables and project plans, which are developed with your IPM. In addition, your Project Manager will organize your company’s tasks, such as on-site training and go-live preparation and will be instrumental in developing agendas for these and other engagements.

Your Project Manager will be your company’s first line of support and information, so he or she should be familiar with the workings of your business and Prophet 21. This person must have considerable technical knowledge and ability because he or she will maintain your equipment and database and work with Epicor on software issues. This person will have weekly status meetings with your IPM and will have action items resulting from these meetings.

Consider the following list of traits for your Project Manager:

- Industry Knowledge
- Management Skills
  - General knowledge of company functions
  - Ability to plan and execute a project
  - Authority to make decisions and enlist employee resources
  - Problem solver/troubleshooter
  - Organized
- Intangible Skills
  - Effective communicator
  - A “people person”
  - Motivated
  - Dedicated
  - Versatile/flexible
  - Secure in job future

**System Administrator**

System Administrator is an optional role that focuses on technical aspects of the software. The number of people that assume this role depends on the size of your company. In some cases, only one person may be needed to back up the System Administrator; however large companies or companies with multiple branches often assign several people to fill this role.

Consider the following list of traits for your System Administrator:

- Industry Knowledge
- Technical Skill
  - Network administration (CNE, MCSE recommended)
  - Set up/maintain a client/server network with SQL server
  - MS Windows OS, SQL Server
  - Client/Server applications
  - Word processor, spreadsheet, and database
- Management skills
  - General knowledge of company functions
  - Ability to plan and execute
  - Authority to make decisions and enlist employee resources
  - Problem solver/troubleshooter
- Intangible skills
  - Effective communicator
  - A “people person”
  - Motivated, Dedicated
  - Versatile/flexible
  - Secure in job future
Project Team Members
Other staff on the Implementation Project Team may be responsible for a concentrated area. They may pull other resources as needed to complete the work; however, they must oversee and report back to the project manager on the progress of each area. The areas may include:

- Data Conversion and Validation
- Procedure Development
- Training
- Support
- Forms Design and Report Writing
- Complementary Products

2.1.2. Understanding Epicor Roles
Epicor wants to ensure that your implementation is to your satisfaction and that you are assisted in the most efficient manner possible. Therefore, Epicor has employed some of the industry's most knowledgeable consultants to assist you during this time of change. Epicor's Implementation Project Managers have years of experience as project managers. Epicor strives to provide the highest quality implementation consultants in the distribution ERP software industry. Epicor consultants will maintain a professional image and will seek to represent both your interests and those of Epicor. They will maintain daily time logs of their activity with your account and will be available throughout the implementation process.

Implementation Project Manager (IPM)
The IPM is your primary contact at Epicor through your go-live on Prophet 21. The IPM will:

- Be the liaison between Epicor and your company.
- Help Epicor understand your objectives.
- Write the Implementation Analysis (IA).
- Help develop a customized implementation plan.
- Set proper expectations for Prophet 21.
- Guide you through the implementation to ensure objectives are met.
- Help prepare for going live on Prophet 21.
- Provide monthly status updates to the President, CEO, or owner of your business.
- Create the foundation for a long-term partnership between your company and Epicor.
- Provide updates to the Project Manager, System Administrator, and Executive Sponsor.

The IPM will oversee the entire implementation process from the time of the signed contract until after you are successfully operating on Prophet 21. The IPM coordinates all the Epicor resources necessary for a smooth implementation.

Your IPM will know the most about your company. He or she will learn about your business and, with your Application and/or Business Consultants, analyze how Prophet 21 can best meet your needs. Though the IPM will not know every detail of every area, he or she must know the issues that you face.

Your IPM will work with your System Administrator/Project Manager to track the progress of the implementation. Together, they will ensure that all necessary tasks are completed on schedule. The IPM will help set proper expectations, schedules and timetables to measure the progress of the implementation and detect any problems that might alter the timetable. Your IPM will inform his/her supervisor, other interested teams, and Epicor executives of the status of your project.

The IPM and Project Manager will work with the Application Consultant to determine the content of your training. They will develop a training plan that incorporates all the training tools that Epicor offers and meets your special needs, unique procedures, and personnel availability.

Each IPM is responsible for several accounts. Occasionally, IPMs travel away from the office for business reasons. During these times they will designate another IPM or will tell you how to contact them while they are traveling. While your IPM will give you as much attention as possible, you must keep the project on track and complete the key areas of the implementation.

If you do not know who to contact on any issue relating to Epicor, contact your IPM, who can provide direction for all of your questions.
Application Consultant

Application Consultants (AC) play a vital role in the implementation process by learning about your business and performing the consulting engagements that help you understand Prophet 21 and tailor your settings and processes to effectively use the system. To prepare for a consulting engagement, the AC will work with your IPM and review previous reports and other information from Epicor’s implementation project tracking system.

During the implementation project, your IPM will remain your primary contact for all issues and questions that arise; ACs are scheduled in advance with different accounts every day and unable to provide a timely response, but your IPM will schedule their time as appropriate.

Please refer to Learning with Onsite Consulting on page 8 for more detail on AC engagements.

Software Support

The Software Support team strives to offer you world-class support in maintaining Prophet 21. All support is handled through Epicor’s Customer Web Site (high-speed Internet access highly recommended). In addition, you will download all software updates (builds) from this site. There is a nominal media charge if you would like a CD.

You can access three methods of support starting from day your software ships:

- **Online Help** – first level of support. To access online help in Prophet 21 select the help icon or the Help menu, press F1, or right-click on a field.
- **Solutions Database** – second level of support. You can access it on the Customer Web Site 24 hours a day, 7 days a week.
- **Support Representatives** – third level of support. If the information you need is not in the online help or Solutions Database, you can enter a case on the Customer Web Site that will be assigned to a Software Support representative.

Technical Consulting

The Technical Consulting team is a team of experts who can analyze your network, review your network infrastructure, and fine-tune your database. Technical Consultants can have as little or as much involvement in your system implementation and integration as you require. They can install Prophet 21, configure server hardware, implement a Windows network, connect branches, or secure your Internet access. Epicor’s experienced and certified consultants can help create a stable and reliable network environment.

In addition, the Technical Consultants are technical experts on Prophet 21. Your contract includes time for Epicor’s experts to install Prophet 21 and to audit your system just before go-live to verify that your network is functioning adequately for go-live. Your IPM will schedule these hours.

Data Conversion

Epicor’s Data Conversion team can help you import data into Prophet 21. The Data Conversion team offers package or à la carte services. Contact your IPM to learn more.

Software Development

The Software Development team creates Prophet 21. If you purchase custom software, you will work with your IPM and members of the Custom Development team. To ensure that your custom software functions as required, communicate your needs clearly to the Epicor team and carefully review all functional specifications before approving them. Refer to Developing Custom Software.
2.2. Holding Status Meetings

Communication is the key to a successful implementation. Therefore, you should continuously work with your IPM, including weekly or bi-weekly status meetings. These phone meetings last 30-60 minutes. If you have more than 100 users, you should also have bi-monthly onsite meetings with the project team and IPM.

These meetings bring the project team and your IPM together to review the project plan, identify tasks completed and uncompleted, assign the next scope of work, and address any issues that may arise during the implementation. Each meeting needs a defined business area (e.g., purchasing, accounts receivable) to allow questions and issues from that area to be addressed. In the status meeting you will review:

- Action items from last call, project plan, completed tasks.
- Procedure development.
- Data conversion.
- Training – On-site and web-based consulting and LMS status.
- Hours – compare contracted versus used; review scheduled and open hours.
- Complementary product issues.
- Software customizations.
- Open support cases.

2.3. Understanding Billing

Time is billed in quarter-hour increments at a per hour rate. The invoices list the consultant’s name and the date the hours were used. Billable services include, but are not limited to:

- Onsite visits by the IPM or AC and web consulting engagements.
- Introductory call and kick off meetings.
- Completing and documenting the Implementation Analysis visit or phone call.
- Holding weekly status meetings and creating status reports.
- Creating and maintaining a project plan.
- Resolving issues.
- Documenting procedures.
- Working with Custom Development/EDI/Complementary Software etc.
- The period between go-live and full transition to support.

For example, you might receive an invoice for 30 minutes each for maintaining the project plan, preparing status reports, providing other consultation services, and resolving/managing issues.

Epicor invoices for Implementation, Technical, and Application Consulting twice a month so that the invoices arrive closer to the actual performance of services, which will help you to track how much Implementation Consulting time you are using.

Resolving Billing Issues

Your IPM adds value to your implementation project both working directly with you and working with Epicor’s internal staff. That value-added time is billable. For example, if you ask your IPM to work or check on a support issue, that research time and related work is billable because the IPM’s expertise and ability to expedite and coordinate resources adds value to your implementation and saves you the time and energy to research on your own.

Epicor does its best to estimate the total number of implementation hours needed during the implementation cycle; however, you may need additional hours. Your IPM will alert you if you near the end of your contracted estimate of hours. If you want to purchase additional hours you will receive Request for Services from your IPM and the Professional Services Sales (PSS) team. You must review and verify that the information is correct and as you requested and then fax the signed form back to PSS.
3 Training Your Staff

Your employees must gain as much experience as possible with Prophet 21 before go live. By using Epicor’s balanced approach to training you will have knowledgeable, productive employees working on Prophet 21. Epicor’s experience in training distributors for more than 30 years has proven that balance and variety in training methods is extremely valuable. The training methods Epicor allows your employees to learn Prophet 21 in a variety of methods, yet provide balance and consistency in content.

The Epicor training plan follows a learner-focused strategy, combined with traditional and web-based technologies, to offer your organization the most valuable learning experience at the lowest cost possible. The Learning Management System (LMS) provides the initial introduction to Prophet 21 and its basic functionality early in the implementation cycle. Then an on-site Application Consultant can focus on the unique needs of your employees and business. The comprehensive educational curriculum meets the learning needs of distributors and their employees. Epicor experts, each with extensive industry experience, develop all courses and materials, which are offered either online or in the classroom - with each method providing a distinct learning advantage.

3.1 Learning Independently

3.1.1 Using the Learning Management System

The Prophet 21 Learning Management System (LMS) is a subscription-based service that gives your staff unlimited access to over 170 training courses designed to maximize your use of Prophet 21. Available courses include On-Demand Courses that are self-paced and can be accessed over the Internet at any time and live courses that are available at specific dates and times and allow for questions with a live instructor. New courses, including new version release courses, are continually added to the LMS and are included as part of the LMS subscription.

Creating Agendas and Tests

Your staff can browse the course catalog and enroll themselves in courses, or a Learning Administrator can assign courses and track employee progress of assignments. Reports allow employees and administrators to see every completed course.

The Prophet 21 LMS allows administrators to assign standard or customized training agendas to your staff. The agendas can include courses and target start and completion times. You can also automatically email alerts to an employee or manager notifying them that a course has been assigned or is nearing its due date. Administrators can review progress status of all assignments.

The Prophet 21 LMS includes extensive testing functionality that includes standard tests on courses and a vast test question database that allow you to customize tests. You can assign tests to employees and gauge their knowledge. Your Learning Administrator can create test questions on your company’s use of Prophet 21, internal procedures, or any other topic. Administrators may view individual results or aggregate scores across the entire organization. Best of all, the LMS recommends further training based on test results. These recommendations help your company pinpoint areas that require the most attention.

You can use the LMS to manage education beyond Prophet 21; LMS can be your employees’ central home base of learning. You can add common links to other educational resources as well as host a library of internal resources. After you are live on Prophet 21, you can renew your valuable LMS subscription to continue and expand your knowledge of Prophet 21.
Registering for Live LMS Courses

Live LMS courses allow students to engage in 1-2 hour classes delivered over the Internet. Students interact online in real time with the instructor and other students without leaving their offices. Upon registration, a confirmation will be emailed to the student indicating that their registration was received. 24 hours before the class time, registered students will receive an email with a link to connect to the training delivered via Microsoft Live Meeting. First time users of Microsoft Live Meeting will be able to download client software to join the course. Make sure firewalls allow for the live meeting client to be downloaded on end-users’ machines.

Because you are in implementation, you should follow the instruction of your IPM to ensure that you enroll in appropriate classes.

3.1.2. Attending Classroom-Based Training

Classroom-Based Training courses provide intensive, classroom-style instruction. In addition to having an instructor, these courses include the added advantage of removing students from the distractions of their work settings. These courses usually last 1-2 days and provide intensive, hands-on coaching on aspects of Prophet 21. Contact your IPM for help registering for Classroom-Based Training.

3.2. Learning with Onsite Consulting

For most people, no training methodology is complete without having an Application Consultant (AC) come on-site and work directly with employees. The amount of quality training time your employees receive and the success of your implementation are directly related. Your IPM and AC will help you develop a training schedule that meets your needs.

Application Consulting is the segment of the implementation in which you learn how to use Prophet 21 to run your business. Epicor will consider many factors to assign an AC to implementation engagements, including training needs, skill set, availability, and geography. The individuals that attend the trainings vary by the topic being addressed, but the System Administrator/Project Manager will generally attend all training to ensure a working knowledge of the entire system. Others will attend training on their business area.

3.2.1. Preparing for Consulting

Preparing for any training varies, but all training sessions have the same basic requirements:

- **Data** – Before each engagement, load as much data as possible into the system. Everyone learns more effectively if the data matches the context of your business.
- **Hardware** – Test the equipment and the connections before training. An AC is only on site for a limited time, and it is a poor use of resources for the AC to troubleshoot technical problems.
- **Terminals** – Have at least one PC for every two people in the training session. Crowing staff around a single PC is not conducive to learning.
- **Printers** – One printer is needed for training purposes.
- **Forms** – You are not required to be familiar with all available forms during training, but training is more effective if your employees see an example of the finished product in training. Test printing the standard baseline forms early in the implementation and address any necessary customizations immediately to ensure forms are complete.
- **Reports** – Be sure to have critical reports available for reference.
- **User Setup** – All users should have IDs in both the SQL database and Prophet 21 before the training. This way, the users can learn how to log on to the system, as they will each day once you are live on Prophet 21.
- **Projector** – A projector may be needed if training a large group.
- **Speaker Phone** – May be necessary for large groups.
- **White Board/Flip Chart** – Used for “parking lot” questions.
3.2.2. Scheduling Consulting

You will schedule the training as soon as you have worked out the dates with your IPM (ideally at least 2 months’ notice to guarantee your training dates). Keep these ideas in mind when scheduling training:

- **Uninterrupted time** - When scheduling training, please consider your employees’ schedules and workloads so that they can allocate uninterrupted time for their training sessions. Because your business must continue while an AC is on-site, breaks are included in the training agenda. However, you must minimize interruptions or you compromise the quality of the training your employees receive.

- **Data entry** - For on-site training, you must enter or import a portion of your data into the training database before training; training is most effective when the information you use in the demonstration is realistic.

- **Complete Prior Training** – All LMS training courses recommended by your IMP should be complete prior to a consulting engagement to ensure you get the maximum value out of the consulting time.

- **Time to practice and resolve issues** - If the training happens too far ahead of your go-live, your employees could forget what they have learned. Therefore, end-user training is typically 1-2 months before go-live. You will need ample time to practice between your training and go-live. Some issues don’t arise until after you start training; you must leave time between training and go-live to resolve these issues.

- **Branch staff** - Determine how you will train your branch employees; LMS classes are excellent low-cost training solutions for remote branches. You may also consider a train-the-trainer approach for branch locations or combined regional training.

- **Class size** - Classes should be as small as possible (e.g., 5-10 people) so everyone gets hands-on training, which helps in the training process and allows the students to remember more of what learn.

Epicor will work with you to reserve your training time. To schedule training, you will receive a confirmation letter that you must sign and fax back. If you do not sign and return the confirmation letter, you may lose the AC that was scheduled for your training.

### Cancellation Policy

Consulting engagements do have a cancellation policy that is detailed on each confirmation letter. The policy control costs while increasing customer satisfaction for this valuable service. Epicor coordinates dozens of consulting sessions with many accounts each month; last-minute cancellations cause unfilled consulting slots, unnecessary travel and administration costs, and denies other accounts beneficial consulting services. A cancellation fee will be imposed if your consulting engagement is cancelled with less than the notice explained in the confirmation letter.

If you have any questions about the cancellation policy, please contact your IPM.
4 Implementing Prophet 21

The implementation of Prophet 21 follows the framework and tasks outlined in this section. These tasks are necessary for a smooth and successful go-live. To complete these tasks, you must identify and complete numerous sub-tasks. Your IPM will help you set deadlines for these tasks.

4.1. Getting Started

4.1.1. Identifying Your Project Manager / System Administrator

You must identify an individual who can manage the implementation process from your company’s perspective and a person to maintain the system once your company is live on Prophet 21. In many instances, the same person fills both roles. This person will work with the IPM throughout the process and should be empowered to drive your company’s implementation project to your go-live date. If no one in your organization possesses these skills, seriously consider outside consulting assistance until you hire someone for these roles.

4.1.2. Attending Introductory Call

The IPM will contact you shortly after you sign the contract. During this call, your IPM will give you an overview of the implementation. In addition, you will discuss the steps needed to get to the next phase of the implementation. In most cases, the next phase will be the Implementation Analysis (IA). You will also receive a Go-Live Checklist that ensures that critical steps are addressed. Modify the checklist as necessary and review it periodically throughout the project. After the call, your IPM will send information about preparing for the IA, the IA Questionnaire, and a hardware specification if you need to purchase hardware. Before choosing hardware and an operating system, please consult your IPM and the Technical Consulting team.

4.2. Completing Implementation Analysis

The Implementation Analysis (IA) is a roadmap to develop your implementation plan for Prophet 21 and is the most important part of your implementation. You must include all processes, reports, or expectations you have in the IA. Depending on your contract, the IA may be onsite or over the phone. The following employees should prepare and/or analyze your IA:

- Project Manager/System Administrator.
- Executives and key managers.
- Front-line employees from each functional area.

The IA reviews your current business practices and identifies the individuals who will play key roles in the implementation process. The IA identifies new business processes that may be used in Prophet 21 and helps Epicor understand how you do business. Although it will lay the groundwork for you to create a procedure manual, the IA will not contain detailed steps and processes like a procedure manual. Generally it is also not cost-effective for an Epicor consultant to write a procedure manual; however, you can request additional time (outside your contract hours) to complete this task as needed.

4.2.1. Preparing for the Implementation Analysis

The first step in the IA process is the IA Questionnaire. Please completely answer the questions and gather the required data and return it to your IPM. Please include any organizational charts, flowcharts, or documents on your current business processes. Before the IA meeting, inform your employees about the purpose of the meeting and prepare them to discuss all processes associated with their work areas. You will receive a pre-IA letter before the IA visit or call. This letter contains a schedule of activities for the visit or call. Complete the schedule and return it to the IPM before the site or call. For on-site IAs, set aside a conference room or meeting area where the IPM can meet with each employee.
4.2.2. Performing the Implementation Analysis

The IA has four objectives:

- Allow the IPM to learn your business so they can provide a higher quality of consulting throughout the implementation.
- Lay the groundwork for the project.
- Identify functional issues (ideally 80%).
- Develop a foundation for you to create a procedure manual.

The IA focuses on business practices and the integration of your existing systems, which provides the foundation for how you will use Prophet 21.

The first step of the IA is the meeting between the IPM and the employees from each of your functional areas, not just management. Front line employees often provide details that may be missed at other levels. If the IA is on-site, the IPM will sit with the people while they are doing their jobs to observe their processes.

Please contact your IPM with any questions or concerns or for more detail about the IA.

4.2.3. Drafting and Approving the Implementation Analysis Report

After the IPM collects the information about your company, he or she writes the formal IA document, which will take about two weeks. Upon completing a draft, he or she will send the IA to you for your review and feedback. You must review the IA very carefully (1-2 weeks) because Epicor bases its decisions and implementation suggestions on the content of your IA.

When the IPM receives your feedback, he or she will update the IA accordingly and send you the final version of the IA, which will be the basis of your project.

Once you approve the elements of the IA, sign and return it to your IPM, confirming your willingness to proceed to the next phase of your implementation.

4.3. Planning Your Implementation

4.3.1. Developing a Training Schedule

Throughout your implementation your IPM will arrange your consulting sessions and develop a consulting schedule that meets your company's needs based on your implementation timeframe, business processes, and staff availability.

A major factor in determining how you use your consulting time is how you plan to educate branch employees. You can use the following methods individually or together:

- **Combined at Main Location** – All of the employees of the branches go to the main branch for training with people of the same job function (e.g., all order entry personnel are trained together at the main branch). In most cases, two training sessions would be held to maintain the business flow at the branch. This method works well if your branches function in the same way as your main location.

- **Separate at Main Location** – The employees at the main branch are trained separately from the branch employees. The branch personnel are trained in several smaller groups focusing on their job function. This training site could be in a branch or a conference room.

- **Main Location and Individual Branches** – Each branch receives individual on-site training. You and your IPM will create a schedule to train the personnel. This method works well if you have only a few branches and the staff needs to know the entire system.

- **Super User** – One employee from each branch is thoroughly trained on Prophet 21. These employees return to their branches and then train the other employees on Prophet 21. This method works if you have people at each branch who are very strong in company procedures and who are very computer literate. This method is also effective for locations spread over multiple states or countries.
4.3.2. Choosing a Go-Live Date

Go live is the day when you start running your business on Prophet 21. You may set the go-live date at the beginning of the implementation cycle while still in the planning stage. Most go lives are on a Monday to use the weekend to finish preparing. Be sure to schedule free time for unplanned contingencies so that any surprise issues are addressed without delaying your actual go-live. However, many factors affect the actual date.

You and your IPM will consider the following when choosing a go-live date:

- **Project length** – depends on several factors, including the number of users and, most importantly, the time you can allocate to the project.
- **Realistic go-live date** – If the go-live date is too aggressive, you may not be able to meet deadlines, which could affect scheduling Epicor resources and your employees’ opinion of the software, which can lead to increased cost.
- **Plan in terms of project milestones** – significant business events, such as the fiscal end of the quarter/year; do not need to direct your go-live date for a smooth transition.
- **Custom software/forms/reports** – custom software, forms, and reports time and completion dates are always subject to change, particularly if the scope of the custom project changes. Prophet 21’s baseline functionality is built around industry best practices that your company will likely benefit from. Therefore, you should learn how Prophet 21 can accommodate your needs before considering custom software. You may choose to go live without any custom software, instead changing processes to use Prophet 21’s baseline functionality. Then, after being live for a few months, you can evaluate your need for custom software. This method allows for a shorter implementation timeframe because you do not need to spec, develop, QA, and test the custom software.
- **Business cycles** – if you have peak and slow periods, consider them when you plan your implementation. Do you have the available resources during your busy season? Will your employees be able to focus on meeting the demands of your peak cycles and learning a new system?
- **The time/cost/scope triangle** – if your implementation period is too short, your costs will be high and your return on investment (ROI) low because you won’t have proper training and preparation. Your procedures will not be documented and your employees will not be adequately trained. If the implementation is too long, your costs will be high because employees might need refresher training if they forget their training, and you will be more likely to spend additional money on consulting services. The Epicor Implementation Team strives to make sure you go live in the most timely and cost-efficient manner possible.
- **Hardware** – if you need to order hardware, allow time for the hardware to arrive.
- **Data Conversion** – Consider any down time associated with data conversion. The Data Conversion representative and IPM can guide you through this decision. Also consider the impact on your resources if you are converting your own data.

4.3.3. Creating a Project Plan

Epicor strongly believes that without a plan, you can have no control. Therefore, your IPM will create a project plan for your implementation using Microsoft Project. All tasks and milestones flow from this plan. Your IA may include two timelines: one that you desire and one that Epicor recommends. This plan should be updated weekly to reflect any changes. You can choose to maintain and update the plan yourself or allow your IPM to maintain the plan.
4.4. Installing Hardware and Software

You, a local consulting firm, or the Epicor Technical Consulting team can install your hardware and/or software. Your System Administrator/Project Manager is responsible for the installation tasks. Whether you do the installation yourself, enlist the services of an outside consulting service, or use an Epicor Technical Consultant, you must be fully involved. Epicor’s Technical Consultants are experts in installing Prophet 21.

4.4.1. Reviewing and Installing Hardware

Depending on your contract, either Epicor or your System Administrator/Project Manager will install or oversee installation of all necessary hardware and software for Prophet 21. The acquisition and integration of the server and workstation hardware and the network components should be based on your Epicor Technical Consultant’s recommendations.

Hardware installation includes:

- Dedicated database server running Windows and Microsoft SQL Server File server.
- Any additional servers that may be used in your environment (VSIFax, Epicor Business Analyzer, Trading Partner Connect, etc.).
- Client PCs, printers, network equipment, (e.g., hubs, switches, routers, CAT 5 or better cable), and any communication lines (T1, T3 or other) needed for Internet access.
- A thin client solution using Microsoft Terminal Server Edition or Windows Terminal Services and Citrix Metaframe can reduce administration costs by centralizing application access and extending the useful lifespan of desktop machines. A centralized point of administration can reduce application deployment cycles from months to days. Branch offices and a remote sales force can benefit from increased performance over the wide area network or dial-up connections.

Installation times vary based upon your current network infrastructure. If you have an existing network, installation time can be significantly reduced. Include time to acquire, install, and implement the hardware project plan. Hardware costs fluctuate greatly and holding off on the final hardware purchases a couple of months can many times save thousands of dollars. However, please coordinate your hardware purchase appropriately so that your go-live date is not jeopardized by waiting too long to purchase your hardware.

Reviewing Your Network Infrastructure

Epicor’s Technical Consulting team draws upon experience to ensure that your implementation goes as smoothly as possible. A Technical Consultant will contact you before or during your IA visit to review the network questionnaire. The consultant will analyze your current infrastructure and recommend hardware. If you plan to use a local provider for your networking requirements, a Technical Consultant can review and evaluate their proposed hardware and network solutions. The Technical Consultant can also help you upgrade your network, hardware, and communications equipment.

Based upon your described business process and your Network Infrastructure Review, an Epicor Technical Consultant can help you determine what hardware is suitable. But you will ultimately determine what hardware you order. The requirements of the servers vary widely based upon the number of users on the system and activity on the system. Epicor recommends that you use powerful servers. State-of-the-art multi-processor servers perform the best.

Hosting Hardware

Epicor can also act as an Application Service Provider (ASP) or host to Prophet 21. With Epicor's Hardware Hosting, you can quickly and easily access Epicor's business critical applications via the Internet without the associated costs of managing and supporting the applications and their back-office infrastructure. Epicor will host Prophet 21 including other value-added services, such as application consulting and customization over the Web.
4.4.2. Installing Software

In this phase, Prophet 21 and its database will be installed, in addition to setting up workstation access. Your System Administrator and/or Epicor Technical Consulting install the database and application. However, Prophet 21 is not immediately required throughout your organization to start your implementation. The software can be installed on a machine as small as a single laptop if it meets Epicor’s minimum hardware requirements. You can also install Prophet 21 in a controlled environment and begin training immediately with the project team. This approach can have many advantages, including:

- The project team can start setting up your database and working on the implementation work early in the implementation lifecycle.
- Hardware costs fluctuate and many times by waiting to purchase your production servers, client machines, etc., you can purchase more hardware power for less money.

To install Prophet 21, you must:

- Install SQL Server on the database server. Microsoft SQL Server, the type of database software used with Prophet 21, must be installed on your servers and client machines must be established before Prophet 21 is installed.
- Install SQL Client utilities on workstations.
- Download the current Prophet 21 build from the Customer Web Site.
- Distribute Prophet 21 executables.

For instructions on installing Prophet 21, refer to the Installation Guide on the installation CD. The document contains information on how to install Prophet 21 in a variety of scenarios, as well as installation instructions for Accelio and Adobe Acrobat Reader. It also contains instructions on loading a seed database.

4.5. Setting up the System

System Setup Consultation establishes the foundation of Prophet 21, sets up the framework of your database, and gives you an overview of Prophet 21's data definitions, system settings, and required database setup. At the end, you will have 3 databases for testing, importing, and establishing settings for your implementation.
4.6. Building Your Database

Your data is one of the most valuable resources in your company. Building your data is arguably the most crucial step to your implementation. If the data is not correct, your implementation will not go as well as it otherwise should. Data errors can cost your organization thousands, and potentially millions, of dollars that you can easily avoid.

Your implementation project plan must include developing your database, including entering data into Prophet 21. Many steps in the implementation process, such as data entry, do not follow a standard time frame. Each implementation is individual, and the time frame for each phase should be adjusted accordingly.

Data entry is more than just entering customers, vendors, and items; it includes general ledger accounts, pricing schedules, product/discount groups, payment terms and other options. You must learn the proper methods, sequence, and the rules that govern data entry. You should delegate data entry tasks to the person(s) who know the most about that data and then set deadlines to ensure the process goes according to schedule.

You may use IPM or AC consulting hours to determine how to use Prophet 21’s data fields. You can also use Epicor’s Data Conversion team.

Data entry typically includes a combination of these methods:

- **Enter data manually** – may be the only option for some types of data. Your legacy system may not have stored all of the information that Prophet 21 requires.
- **Import data** – allows you to import data from your old system into Prophet 21. Import file layouts are in the Prophet 21 help file.
- **Use Epicor’s Data Conversion team** – Epicor’s Data Conversion team can help you extract, format, and import your data. If you are interested in Data Conversion’s assistance, contact your IPM.
- **Use the Data Setup Wizard** – walks you through setting up your data in the appropriate order. During the Database Building phase you can refer to the online Data Setup Wizard in the Module menu in Prophet 21 as a guide.

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### Do Not Use Special Characters

Never use special symbols such as single or double quotation marks (‘, %, underscore, etc.) as characters in the data; some of these characters are special indicators in SQL.

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4.6.1. Entering Data Manually

The manual data entry method requires you to go through each of window and enter the appropriate data (e.g., pricing, tax groups). Also, open order and purchase orders are entered manually the weekend of go-live because:

- Prophet 21 is a fully integrated system and the highest amount of integration is in the order and purchase functions. If one link to the main table is missed during the import process, many problems could result in future order/purchase processing. The safest way to bring over open orders and purchase orders is by entering them manually.
- Your employees will gain valuable experience when they enter transactions the weekend of go-live. Many companies who are live on Prophet 21 can attest to the benefits of hands-on practice. Also, manually entering those transactions provides additional practice and helps ensure a successful go-live.

4.6.2. Importing Data

You can use Prophet 21’s import functionality to take a file in a specific format and transfer the data into the system. This import functionality is a quick, easy way to build a large portion of your database. If you choose to manage the data entry task internally, your System Administrator/Project Manager should lead the effort and delegate data entry assignments and responsibilities so that each team can ensure the data they require is correct.
4.6.3. Using Epicor’s Data Conversion Team

For a successful conversion, the Epicor conversion expert and your company work as a team. Your data conversion expert and your System Administrator/Project Manager will communicate constantly during this process. A single database may be converted more than once before the data meets everyone’s expectations.

Mapping Data

The first step in the data conversion process is to complete the data mapping sheets. These sheets tell Data Conversion how your data goes in Prophet 21. After you complete the mapping sheets, your IPM will review them to make sure you are best using this crucial moment in the implementation because:

- Your IPM is the most familiar with your account and has a unique perspective that nobody else at Epicor has when it comes to your account.
- Your IPM and your Data Conversion rep play significantly different roles in your implementation. Data Conversion is specialized in technical aspects of converting data. Your IPM is the best resource to advise you on how to best use the data or find something unusual in your mapping. Your IPM has the appropriate knowledge to answer questions regarding mapping sheets. Those questions may result in miniature training sessions, which the Data Conversion cannot provide.

After your IPM approves them, the data and mapping sheets go to Data Conversion at least six (6) weeks before the go-live date. Epicor reserves the right to assess a two (2) percent late charge for every day inside the six (6) weeks that this information is late.

Your Data Conversion representative:

- Writes programs to convert your data files from the format and rules you provide into the format required by Prophet 21.
- Tests your data to make sure the data imports with as few errors as possible.
- Works with you to address any issues that come up from testing, such as missing data.
- Retests your data until all issues are resolved.

Data Conversion Process

1. You send static data to Data Conversion.
2. Data Conversion converts your data and sends it to you in a designated time period.
3. You review the data and verify that it is correct (Verification Sheets are available on the Customer Web Site). Data is also verified as you train and practice on the system. Users can examine the data and provide feedback on its accuracy.
4. You provide detailed information about data that is missing or mapped incorrectly.
5. Data Conversion corrects and sends your data back to you.
6. You re-review the static data (steps 3-5 continue until the data is correct).
7. Once the data is correct, you sign off on it.
8. You send dynamic data to Data Conversion.
9. Data Conversion converts the dynamic data and sends it to you in a designated time period.
10. You review the dynamic data.
11. You provide detailed information about data that is missing or mapped incorrectly.
12. Data Conversion corrects and re-sends the dynamic data.
13. You review the data, verify that it is correct, and sign off on it.

You, your IPM, and the Data Conversion team will schedule these activities.
4.7. Developing and Verifying Processes

Prophet 21 is bound to change your business processes and you must document these changes. This documentation provides employees with guidelines to follow and ease difficulties that change brings. The Process Development consulting engagement helps you start this process.

4.7.1. Developing Processes

When implementing any ERP, you must document procedures that end-users will follow. This Process Development consulting engagement helps you define your processes so you can document them. The main purpose of Process Development is to develop a refined list of procedures for Prophet 21. During this engagement, you will:

- Review each functional area in Prophet 21.
- Choose procedures to use.
- Begin documenting your procedures.

This session will generally be held 1-2 months after your System Setup Consulting. The earlier this engagement occurs, the more time you have to document your procedures; therefore, this engagement will occur in the first third of your implementation. Your data imports do not need to be complete before this class. You should enter a few customers, items, and vendors in the play database so you can review all functionality.

Generally, the project team, managers and super-users are involved in this engagement, which is an education and decision period. Before this training, all attendees must complete the LMS classes related to their area so the AC can focus on processes and procedures instead of basic application training. During Process Development, you will likely have several periods of conversations. These debates enable your managers to agree on the exact procedures to use and allows the AC and management staff to be on the same page during end-user training, which minimizes confusion and increases training quality. In addition, the procedures gathered during Process Development will make it easier for you and your IPM to customize training schedules.

The managers are given a complete overview of the system and are taught how data flows from one area to the next. As the AC and management staff move through the application, you will decide how to use Prophet 21’s functionality. Your management should take effective notes during this session so that any processes discussed can be further tested and documented by your project team after the AC’s visit.

Writing Procedures

Implementation of a new enterprise software system invariably results in new processes, which you must document. This procedure manual is critical to the success of your implementation. It ensures that all company employees use best business practices and reduces the risk of employee error if they do not recognize a procedure that may be a critical function in your business. The manual should cover general processes for the main areas of the system and information about how your business handles special order types like credit hold orders, customer returns, or rush shipments. Special circumstances can be as simple as using a field in the customer record for something other than its original intention, or it can be as complex as subtracting a builder allowance from a sales order.

A Project Team member will be assigned to document procedures or coordinate the documentation of procedures. The personnel responsible for procedures will pool these documents and produce a procedure manual for your company.

As a rule Epicor consultants do not write procedure manuals and, therefore, your contract does not have any time allocated for the writing of a procedure manual; however, contact your IPM with any procedural questions you have so consulting can be scheduled, if necessary.

Refer to the Procedures section Prophet 21 Help File to start your procedure manual. You can simply cut and paste the text from these topics into your own manual.
4.7.2. Verifying Forms and Reports
At the beginning of your implementation, start defining where you will get the necessary information to run your business. Do not assume that the information exists or is in the format you need. You must review:

- **Forms** - Review all forms to ensure that they provide the data you need, including pick tickets, invoices, and customer statements.
- **Reports** - Since you likely have specialized reporting needs, Prophet 21 has an open database architecture so you can write your own reports using a variety of tools including Crystal Reports, Microsoft Excel, and Microsoft Access.
- **Checks** - Make sure that your bank accepts checks generated by Prophet 21. If necessary, locate magnetic ink cartridges for laser printers. Also make sure you have the correct check stock and determine if perforations are needed on the checks.

You must allow ample time to write and test forms and reports that you need after go-live. These report needs should be determined early in the implementation cycle so that you can determine the appropriate method of delivering the report.

4.7.3. Verifying Equipment
You must make sure that the communications equipment for all remote locations is in place so that it can function at go-live:

- **Printers** - usually requires the most attention and can be a sticking point in an otherwise smooth go-live. Test the printers at all locations well in advance of go-live weekend.
- **VSI-Fax modems.**
- **Credit card swipers, signature capture and modems/high-speed connections.**
- **RF guns and scanners.**
- **PDA devices – remote signature capture.**

4.8. Training End Users
End-User Consulting takes place 4-6 weeks before go-live so your end-users have time to practice what they learned on the play system and do not forget the training. Before this onsite consulting/training, all end-users should complete appropriate LMS classes.

End-user training teaches the employees who will use Prophet 21 daily. Each area of Prophet 21 is broken down into specific periods and covered in detail. Information from the Process Development Consulting will be used to determine what parts of Prophet 21 your employees will use. The End-User Consulting will focus on those areas. Training will vary based on your needs. You and your IPM will adjust the schedule and content on how you will use Prophet 21 and other types of training scheduled. For example, you may need multiple sessions for the same topic so you do not have to commit all staff from a team to a single training session.

Your play database should be relatively complete before this training so end-users to have the full breadth of data to use in their training and practice. This also provides for a much more relaxed training atmosphere with students that are comfortable with Prophet 21 and can ask meaningful questions related to their experience.
4.9. Practicing

The best way to understand Prophet 21 is to practice with actual data and see the whole picture. Between End-User Training and Go-Live, each user must practice each day in Prophet 21’s play database using their daily work as a guide. This practice will minimize go-live stress that the employees face with the changing of a business system.

Different approaches may be used to encourage this practice. Some organizations allow their employees 30-60 minutes a day to practice using real-life transactions they processed that day on the legacy system. Some companies offer incentives to the employees that process the most practice transactions. Your IPM can discuss further options for encouraging this practice time. Remember that every minute spent in practice before go-live will make your go-live that much smoother with less impact on your customer service.

Everyone who will use Prophet 21, regardless of his or her role, must practice. Setting aside practice time for all users gives them the responsibility of learning the procedures in the system and involves everyone in the implementation. It also brings a sense of working together as a community for the implementation project.

You must also make sure that the System Setup options are set correctly in the Setup module so employees can practice with the settings you will use when you are live on the system. After training, you will have a sense of what is available to you, and how you will set the options.

Even though your company documented procedures during the implementation analysis and management training, End-User Training and practice typically uncover more procedures and issues that must be resolved before go-live. In fact, you will refine operating procedures throughout the implementation. You must document these new processes and educate your staff.

4.10. Auditing the System before Go-Live

Just before you go live on Prophet 21, an AC will review the entire setup of your system to look for errors and oversights and prevent difficult problems after go-live. During this audit the AC will review the System Settings and recommend changes, if necessary. They will verify that certain data has been imported and/or manually entered into the system but will not verify the accuracy of your data; only you can verify the accuracy of your data.

You will use this time to review Prophet 21 before you go live. This is your opportunity to validate the work done to this point. This is also an opportunity to verify that no steps were missed during the implementation. Everyone involved in the implementation uses this time to check their work and verify that all data is entered and correct.
4.11. Entering Data on Go-Live Weekend

Converting Dynamic Data
A few days before go-live, you will import journal entries and other dynamic data (open AR, AP, item counts) into Prophet 21. Ideally, the data from your previous system transfers flawlessly to Prophet 21. The accuracy of the database depends on the data brought into Prophet 21 during this phase.

Manually Entering Open Transactions
Certain data must be entered manually. You might decide to enter other types of data manually even though imports are available. For example, most companies choose to manually enter their open purchase orders and sales orders. Purchase orders can be entered weeks ahead of go-live if the received date will be after you go live, which gives your purchasing agents practice in entering purchase orders before go-live. Many companies use go-live as an opportunity to clean out old sales orders and only enter valid sales orders and purchase orders.
You must manually set up and verify other types of data such as customer and vendor/supplier pricing. Use the Data Verification Sheets on the Customer Web Site to assist with this process.

4.12. Going Live

Go-live marks the transition from your legacy system to Prophet 21. An AC and/or IPM will be on-site during your go-live week. They are your first line of support. Therefore, this type of consulting does not include training.

Your go-live is the culmination of all the work that you and your consultants have done over the past several months. Regardless of how much preparation and time are devoted to the system, the actual go-live day is always very busy. Even if you have an AC and/or IPM on-site for the first week you are live, you will need a great deal of support. Many issues and questions will arise in those first few days. Therefore, Software Support will give you increased priority.
5  Developing Custom Software

Custom software refers to changes in the core program that Epicor makes for one company at their request because of the unique business needs. Please note that Gold support is required to request custom software.

5.1. Reviewing Alternatives to Custom Software

Modifying the software may not be the best way of addressing your needs. Prophet 21 incorporates industry-wide best practices that can improve your efficiency and potentially eliminate the need for custom software. You can also:

- **Change your procedures.** In some cases, the way the software works may be better than your current procedures. Prophet 21 was developed with 30 years of distribution experience. Sometimes changing your procedures to fit the system is a better solution than changing the system to meet your demands.
- **Develop an alternate process to handle procedures.** If an alternate procedure does not interfere with your business practices, it may be the best solution.
- **Suggest software changes.** Epicor is always looking for ways to improve the core product. You can record your suggestion on the Customer Web Site.

5.2. Documenting Functional Details

The functional details of the custom software are often worked out during the Implementation Analysis. You will discuss any custom software needs with your IPM so he or she can communicate with the Development team. You must devote as much time as needed to communicate exactly what functionality you need; never assume that functionality is included.

Be sure to tell your IPM if the requested software is critical to your business procedures. If it is, you may need to delay training until the software is complete.

5.3. Quoting Custom Software

If you believe you require custom software to meet your needs, enter a request on the Customer Web Site. After you submit the request, the Custom Software team will issue a quote (typically 1-2 months). You must sign and return the quote to schedule the project for completion. Completion time may vary from 1-9 months depending on the size and nature of your request.

5.4. Re-Certifying Custom Software

The intrusive nature of some customizations makes it necessary to re-certify them. Epicor retains the right to charge a nominal re-certification fee for each customization with a new release of Prophet 21.

If this process becomes necessary, you will be issued a quote from the Custom Software team for the re-certification. If you sign and return the quote, Epicor will ensure that the software is migrated to the new version and that it will have core functionality. You will be billed for the re-certification when the new release has been made available in a general release. Since recertification is purely a retesting effort, you can waive the recertification and test the software yourself. Any defects can then be reported through normal support channels.
6 Ongoing Education and Support

During the first 4-8 weeks that you are live with Prophet 21, your IPM will be available to expedite any issues that need extra attention. After you complete your first 4-8 weeks on Prophet 21 and your IPM believes you are successfully live, you will graduate from the implementation program. Your IPM will contact you to make sure there are no outstanding issues with your implementation and will let you know that you graduated from the program. From this point forward, he/she will not contact you regularly unless you decide that you want to continue to use the expertise and experience of Epicor's consulting team in the next phase.

However, education and process improvement do not stop at go-live. You can always improve your knowledge and use of P21. In addition, you can improve your processes outside of Prophet 21 to help improve your business as a whole. After you graduate from implementation, your avenues of support and education are:

- Customer Web Site on page 22.
- Epicor Educational Services on page 23.
- Consulting Services on page 23.
- Summit Conference on page 27.
- P21 World Wide Users Group on page 27.

6.1. Customer Web Site

In addition to Prophet 21’s online help, Epicor also offers 24-hour-a-day, 7-day-a-week online support via the Customer Web Site, which you can use to:

- Access up-to-date information on Epicor news.
- Search the Solutions Database, which holds over 1000 solutions from Epicor’s support staff.
- Enter a Support Case (a question or problem) for the Support Representatives.
- Add more information to an existing case and immediately notify the assigned Support Representative that you have done so.
- View the status of an existing case or suggestion under development.
- Download updates and other files.
- Access a list of Epicor e-mail addresses.
- Access your Epicor account information.
- Participate in online forums with other Prophet 21 users.
- Learn about educational and consulting offerings and additional products for Prophet 21.

Once you enter the support site, you can add and edit information such as passwords and contacts, enter a new Support case, and check the status of or edit an existing case. To return to the support site home page, clicking Support at the top left of the options list.
6.2. Epicor Educational Services

Your Prophet 21 education does not end at go-live. Epicor's classroom-based training and LMS can continue to improve your bottom line.

6.2.1. Classroom-Based Training

Once you are live on Prophet 21, these classroom-based training opportunities offer a perfect way for you to focus on specific areas you want to improve. Classroom-Based Training courses offer hands-on learning and the most immediate access to technical information about Prophet 21. Trained Epicor instructors deliver essential information in a manner that is easy for you to learn. Most classes are held in a controlled environment so students can apply theory to practice outside of your company's real-time system.

Each student receives an Epicor Educational Services Training Manual with each course. The manuals are concise, clear, and easy to follow. Each contains the necessary information for the course and ample space for notes. All students receive a Certificate of Completion. Contact your Professional Services Sales representative or visit the Customer Web Site to learn about Classroom-Based Training courses and prices.

6.2.2. Learning Management System

Throughout your Prophet 21 implementation project, you have relied on the LMS to educate you and your staff and that education should not end at go-live. LMS has many courses that are not part of a typical implementation project; you can increase your knowledge of and efficiency with Prophet 21 using both the on-demand and live courses. You can continue to create agendas and tests for Prophet 21 and/or for your company as a whole. Also, because your staff is already used to going to LMS for training, you can use LMS as your complete training and education portal. It can include any documentation for your company and messages to your staff. Six months after go-live, administer tests to find out what knowledge was not retained during the implementation and where retraining is needed.

Your LMS subscription automatically renews on the anniversary of your effective date. Your second year subscription rate is a substantial discount from the first-year rate. Check with your IPM or Educational Services for your renewal rate.

6.3. Consulting Services

Epicor offers consulting services to bridge the time and resources gaps to accommodate your company's changing market landscape. Epicor has the experience to deliver consulting services to help determine your business-specific goals and provide a technology solution to meet your changing business needs. Epicor offers a full system life cycle of consulting services to assist you with business growth and changes in addition to new Prophet 21 features. For more information on these services, please contact your Professional Services Sales representative.

6.3.1. Application Consulting Services

Application Consultants can offer full consulting solutions including, but not limited to:

- System audit
- Inventory management
- Inventory control
- Price and cost techniques
- Crystal Report analysis
- Pricing Services
- Getting the most from the general ledger
- Payables review
- Receivables review
6.3.2. Technical Consulting Services

Technical Consultants can offer full consulting solutions including, but not limited to:

- Design and deploy LAN solutions, branch connectivity/WAN solutions, Internet connectivity solutions, e-mail, and thin client solutions
- Review network infrastructure and network security
- SQL migration
- Vendor host connectivity
- EDI implementation analysis, training, setup, and overlay writing/training
- Disaster recovery planning
- Monitor and review network utilization

6.3.3. eBusiness Consulting Services

eBusiness Consultants can offer full consulting solutions including, but not limited to:

- Design and deploy eBusiness solutions
- Enhance existing Web site functionality
- Remotely hosted Web site integration
- Design and deploy Web storefronts
- Web server/merchant server software integration
- Promote the Web site using marketing services
- Build static, dynamic, or interactive Web sites
- Web query information
- Firewall installation and setup
- Security site audit

6.3.4. Business Consulting Services

Epicor has been in the distribution industry for over 40 years. Our Business Consultants are authorities in business process re-engineering, project management, mergers and acquisitions, change management, and financial management. They are distribution experts with incredible depth of knowledge in regards to industry best practices. With decades of real-world experience, they have seen what works and what doesn't, and they can help your organization apply best practices to outperform industry standards.

Key Performance Indicators and the Business Productivity Scorecard (BPS)

Key Performance Indicators (KPIs) are metrics that help you assess how well your business is operating. Selecting and tracking the right KPIs can give managers and executives a snapshot of the business’s overall health. Epicor Business Consultants are KPI experts and will help you identify which statistics apply to your organization. As change agents, the business consultants will also help you identify strategies to improve your KPI performance.

Tracking KPI’s can be a difficult, time intensive job. Fortunately, customers engaged with Epicor Business Consulting will receive access to the Business Productivity Scorecard (BPS). The BPS automatically mines the data in Prophet21 and calculates your KPIs for you. The BPS is an interactive executive dashboard that can be accessed remotely from any internet connection. Customers do not need to invest in any hardware or software to take advantage of the tool.

Many companies only track performance internally without regard to leading industry players. While there is value in tracking company statistics, it’s very important to look externally to compare how well your business is running to your competitors. BPS customers have the ability to automatically track their KPIs against leading industry organizations without having to source the data. The Business Productivity Scorecard has the ability to display your KPI data against other industry leaders so managers can immediately benchmark company performance.

Your Epicor Business Consultant will help you configure the BPS so you can set company goals, measure performance to those goals, and see how well industry leaders perform in the same categories.
Here’s a list of just some of the KPI’s tracked in the Business Productivity Scorecard:

- Inventory Turnover
- Gross Margin
- AR and AP Turnover
- Sales to Inventory Overdue A/R Ratio
- Average Collection Period
- Sales Per Employee

Lean Business Process Reengineering

Lean means eliminating excess waste and inefficiencies in your operation. Your Prophet21 purchase will not yield maximum results unless you are willing to reevaluate your existing business practices with an eye toward overall process improvement and cost reduction. The Lean Business Process Reengineering engagement is specifically designed to assist you in these efforts.

Our teams of Lean-Certified Business Consultants are experts in a systematic 3 step approach to identifying inefficiencies and implementing changes.

1. **Mapping the Current State of the Organization** — The first step to identify areas of improvement is to evaluate current workflows and provide a visual representation to help managers better target improvement areas.

2. **Review Industry Best Practices** — Epicor is a distribution industry leader. We have a library of industry process maps garnered from our most successful customers. Our Business Consultant will present and explain these processes to you and identify changes to your processes that will provide immediate ROI.

3. **Mapping the Future State of the Organization** — Based on the industry best practices and the nuances of your business, you and your business consultant will identify new business and improved business processes that you can quickly implement in your company.

Based on these process improvement mappings, you and the Epicor Business Consultant will work to define a series of measureable results to quantify the effects of the business process improvement activities. For example, you may choose to measure improvements in invoicing time or cycle time with targeted improvement goals.

Lean improvements are important to the longevity of your organization, but implementing these changes can be challenging for your employees. Epicor provides change acceleration workshops to help your company embrace a new, Lean culture.

**Change Acceleration Process (CAP)**

The Epicor Change Acceleration Process can be a vital component of your Prophet21 implementation or Lean Business Process Reengineering efforts. Change Acceleration workshops are delivered by Epicor Business Consultants with extensive implementation and project management background. Designed to get your projects started on the “right foot,” the tools and techniques discussed can be applied to any organizational initiative.

The Change Acceleration Process Workshop (CAP) session presents a systematic approach to managing and embracing change in your organization. When conducted early in the Prophet21 implementation, it can set a positive tone for the entire project and reduce overall implementation time. The CAP workshop is a scalable program based on company size that focuses on these activities:

- Explaining the most common objections to change and strategies to manage them
- Defining Success — your Epicor Business Consultant will conduct activities to help define the scope of the change initiative based on team inputs.
- Creating Organization Momentum — Together with the Business Consultant, you will look at many ways to build enthusiasm and eagerness for the project.
- Stakeholder Analysis — Chances are your project will touch many individuals both internally and externally. The core team and the consultant work to identify these stakeholders and create plans to address their needs.
- Communication Planning — Poor communication has been the downfall of many projects. Your business consultant will show you many strategies for effective project communication.
Mergers and Acquisitions

In today's challenging economic environment, mergers and acquisitions are common place strategies to mitigate risk and enhance opportunities. The M&A activities are not, however, without challenges. Epicor Business Consulting specializes in assisting companies with integrating IT and business practices across all divisions.

Using the Lean Business Process Re-engineering and CAP workshops as a baseline, Epicor Business Consultants will work with representatives from both organizations to map existing business procedures and select the most appropriate processes for the combined organization.

As project management experts, Epicor Business Consultants can train your employees on managing the integration efforts or provide on-site project management services. Epicor manages hundreds of implementation projects a year. Let us work with you to provide the correct temporary resources to train your new staff members and identify and eliminate operational redundancy.

Epicor’s M&A consulting offering includes the following services:
- Project management of resources across both organizations as well as Epicor resources
- GAP analysis of standard operating procedures
- Lean Business Process Reengineering
- Change Acceleration Process (CAP) training
- Data consolidation and rationalization services
- Onsite assistance through go-live for any business needs

Slotting

Often one of the most effective ways to improve your operation is to reevaluate your warehouse design to incorporate industry best practices and Leaner workflows. Epicor Business Consulting’s Slotting offering is specifically designed to address inefficiencies on your warehouse floor and provide practical redesigns.

Slotting is identifying the optimal location of a product in a warehouse to improve efficiencies. It allows workers to minimize footsteps and increase picking productivity and leads to minimal product damage, better accuracy and reduced injury.

The Epicor Slotting solution includes the following activities:
- Planning — before any changes are made the Epicor Business Consultant will develop a detailed project plan as well as a map of the current facility along with requirements and constraints.
- Data Content Building — Your consultant will identify fast moving items, rank them accordingly, and identify important item characteristics.
- Organize Layout — Once the important items are identified, the Business Consultant will use slotting factors to create appropriate aisle and bin locations to maximize capacity
- Labeling — Once you agree on a layout, you and your consultant will select an appropriate labeling structure.
- Training — Along with the core team and management, the Epicor Business Consultant will train the staff on continuous improvement and slotting techniques as designed during the planning phase
- Go-Live — Once the planning and training is complete, the Epicor Business Consultant will be on site with you for Go-Live of the new design and work to make any necessary adjustments.

When combined with the Epicor Wireless Warehouse technology solution, a redesigned warehouse can take your business to the next level and free up resources and man power for other core business activities.

Inventory Replenishment Analysis

In today’s Just in Time environment, traditional methods of Inventory Replenishment are no longer competitive. Epicor’s Business Consulting team will work with you to select the appropriate advanced demand forecasting tools to increase inventory turnover and reduce stock.
Chances are you’ve selected Prophet21 because you realize it’s the best tool to grow with your organization. Epicor Business Consultants are experts in the many dynamic inventory replenishment methods offered in the solution. With Lean thinking in mind, the consultant will analyze your operation and help you select and implement the best replenishment method for your business.

6.4. Summit Conference

Epicor is committed to being your long-term technology partner. Summit, an annual conference for Epicor’s wholesale distribution customers, provides you with many networking and educational opportunities. Executives, IT staff, business partners, customers, and their companions gather from around the country to partake in interest tracks, sessions, and social events. A conference like Summit is the easiest way to build your knowledgebase. In three days, you can learn a wealth of information, get hands-on experience, and meet a variety of experts who have a keen understanding of your technology and your business. For more information about Summit, please visit the Customer Web Site.

6.5. P21 World Wide Users Group

The P21 World Wide Users Group, or P21WW, is organized, run, and maintained by Prophet 21 users. Membership in this group allows you to subscribe to a list server to take part in e-mail discussions, and to attend group-sponsored conferences, where you can network with other Prophet 21 users. To find out more about this group or to register your company, go to www.p21ww.org.

The P21 World Wide Users Group is neither affiliated with nor sponsored by Epicor; it is an independently organized, maintained, and run network of companies and people that use Epicor Prophet 21.
7 Complementary Software

In addition to standard Prophet 21, Epicor offers complementary solutions to help meet your business needs. Complementary software may be developed by Epicor or a third-party company. Some packages have an interface that allows the third-party software to interact with Prophet 21 and some are stand-alone products. Please contact your IPM or the appropriate Support team with any questions.

7.1. Processing EDI Transactions

EDI refers to the ability to create business transactions in a standardized format and pass them to and from your trading partner (customer or vendor). To implement EDI in Prophet 21, you can choose to either implement Trading Partner Connect to handle processing your transactions or you can go with translation software, maps, and a Value Added Network (VAN). Depending on which route you follow, the implementation will differ.

When you use EDI, you do not need to receive an order and re-key it into your system. EDI eliminates double entry because it automatically integrates this data, which saves you countless hours a week in order entry and possible keying errors. EDI also offers speed and allows a quicker turnaround time for orders and invoices.

To process EDI transactions, you must be able to create the transaction (import or export that is handled by Prophet 21), convert the imported/exported information to a standardized format (mapping), and connect to a VAN that can pass the transactions between trading partners. This information is essentially the same regardless of whether you choose Trading Partner Connect or the traditional EDI processing.

7.1.1. Using Trading Partner Connect for EDI

Trading Partner Connect, Epicor’s Internet trading network, streamlines the commerce process between your business and your manufacturers/suppliers and customers, thereby increasing sales and improving customer service while reducing operating costs. You benefit by reducing dead stock, eliminating EDI VAN costs, and accessing millions of items, which enables you to compete on a larger scale and improve customer service. You may also develop Web sites to give end-users online customer service and ordering capabilities 24 hours a day, seven days a week. Trading Partner Connect may include:

- **B2B Marketplace** – The heart of Trading Partner Connect. It provides relationship management tools you need to successfully streamline your processes. You choose with whom and what you trade over a secure Internet connection. It also provides a rationalized catalog that gives you access to millions of items representing more than 2,000 manufacturer lines.
- **B2B Alliance** – Create relationships with other distributors to create new sales opportunities, access billions of dollars of inventory, and reduce your dead stock.
- **B2B Buyer** – Connect directly to your manufacturers’ business systems, enabling you to send and receive business documents in real time.
- **B2B Gateway** – Connect to other purchasing platforms and trading communities with whom you choose to do business.
- **B2B Seller** – Provides a fully hosted and integrated Web-based storefront that services existing and prospective customers, 24 hours a day, seven days a week.

7.1.2. Processing Traditional EDI

With the traditional method, an EDI translation package and a VAN to pass the EDI documents to your trading partners is needed. To process EDI documents, Prophet 21 requires that EDI X12 formatted files are translated into tab-delimited text files prior to import to Prophet 21 and for tab-delimited text files to be translated into X12 documents after export from Prophet 21. This translation is external to Prophet 21.
To implement EDI, you must have a program that translates the data. Epicor does not limit the translator you use but rather the file layout the translation application must create or translate for documents to import to or export from Prophet 21. If choose to progress on your own or with another consultant, Epicor will provide the file layout information, which is in the online help.

### 7.2. Epicor Forms Package

Prophet 21 prints forms to help you efficiently process information. You can print information in a set format or blank paper using a laser printer. To modify the baseline/standard forms you must purchase the Epicor Forms Package and modify the forms yourself and attend training on the Epicor Forms Package or have Epicor modify your forms. The Professional Services Sales team will provide a quote to modify each form.

- **Who to Contact to Purchase:** Your Inside Sales Representative
- **Who Installs:** Your company will install this package.
- **Who Supports:** Prophet 21 Software Support

### 7.3. Integrated Fax Solution

The Integrated Fax Solution is a powerful fax package that offers tight integration with a number of beneficial features. Some of the benefits of the Integrated Fax Solution include the ability to fax documents created on your PC, Server license plus five client licenses, use of up to 12 modems, fax broadcasting and e-mail confirmations.

- **Who to Contact to Purchase:** Your Inside Sales Representative
- **Who Installs:** Your company installs the Integrated Fax Solution using the supplied instructions and the Prophet 21 integration with Epicor-supplied instructions.
- **Who Supports:** The developer of the Integrated Fax Solution supports their product. The Integrated Fax Solution integration is supported by Epicor Third-Party Support.

### 7.4. Business Analyzer

To stay competitive in today’s economy, you must be able to access, analyze, manage, and respond to information in a timely manner. Epicor Business Analyzer (ABA) allows you to better understand and analyze information in your database. This application gives the executive the ability to monitor Key Performance Indicators (KPIs). This quick view gives immediate information and knowledge to make well-informed decisions. ABA summarizes Sales, Inventory, Accounts Receivable, Accounts Payable, Open Orders, Top Ten charts, and other information, which allow you to discover trends and drill down into more detail.

- **Who to Contact to Purchase:** Your Inside Sales Representative
- **Who Installs:** Prophet 21 Technical Support.
- **Who Supports:** Prophet 21 Software Support

### 7.5. Integrated Credit Card Processing Solution

The Integrated Credit Card Processing Solution is an electronic payment application that allows you to accept and use credit cards for transaction processing. The Integrated Credit Card Processing Solution provides a generic application programming interface (API). It works independently of the third party transaction processor, allowing the client to use virtually any third party bank, charge, or debit cards.

- **Who to Contact to Purchase:** Your Inside Sales Representative
- **Who Installs:** The developer of the Integrated Credit Card Processing Solution will send instructions for you to install the software. Your Sales rep will help you complete necessary paperwork.
- **Who Supports:** Epicor Software Support
7.6. Integrated Shipping Manifest Solution
The Integrated Shipping Manifest Solution provides an integrated multi-carrier-compliant shipping manifest system, including rating, labeling, and reporting for most major carriers. This package is very powerful and highly customizable to fit your warehouse needs. You can contact Epicor consultants to customize the system.

- **Who to Contact to Purchase:** Your Inside Sales Representative
- **Who Installs:** Epicor’s Third-Party Support.
- **Who Supports:** Epicor’s Third-Party Support.

7.7. Warehouse Management Solution
The Epicor Warehouse Management Solution is a complete warehousing solution that uses hand-held radio frequency units. These components monitor all basic warehouse functions, including picking, receiving, putaway, cycle counting, primary bin replenishment shipping, and lot and serial number control. Epicor WMS brings increased accountability and accuracy to each order processed. This level of enhanced control in daily operations reduces operational costs.

- **Who to Contact to Purchase:** Your Inside Sales Representative
- **Who Installs:** Prophet 21 Software Support.
- **Who Supports:** Prophet 21 Software Support.

7.8. Integrated Report Writing Solution
The Integrated Report Writing Solution allows you to generate presentation-quality reports against Prophet 21 data, using easy-to-use "report experts" that guide you through creating the report. This package is the industry leader in report writing and allows you to generate reports that can be widely distributed and viewed.

- **Who to Contact to Purchase:** Your Inside Sales Representative.
- **Who Installs:** Your company or Epicor Technical Consulting.
- **Who Supports:** The developer of the Integrated Report Writing Solution.

B2B Seller is a Web-based storefront that allows you to expand your geographic reach without making a huge financial investment. Your customers can check inventory, place orders, track invoices, check the status of open orders, and review purchases - all without help from your staff. This not only increases sales and improves customer service, but also enables your customer service staff to focus on more profitable tasks, such as selling.

- **Who to Contact to Purchase:** Your Inside Sales Representative.
- **Who Installs:** Your company or Epicor Technical Consulting.
- **Who Supports:** Prophet 21 Software Support.

7.10. Portal Designer
Prophet 21’s Portal Designer is a versatile new tool that allows you to design views, interactive reports, and queries for the many different roles and types of users in your company. Working in the existing structure of Prophet 21’s portals, provides access to the data that is most beneficial for the employees at your company to make decisions and most efficiently perform day-to-day activities while quickly identifying tasks and transactions that require prompt attention.

- **Who to Contact to Purchase:** Your Inside Sales Representative.
- **Who Installs:** Your company or Epicor Technical Consulting.
- **Who Supports:** Prophet 21 Software Support.