

# Epicor® Prophet 21® for HVAC Distributors

## Functionality

- ▶ Quotes and orders
- ▶ Front counter
- ▶ Order history/previous requests
- ▶ Customer-specific pricing
- ▶ Contract pricing
- ▶ Lot billing
- ▶ Accessory/substitute items
- ▶ Assemblies
- ▶ Serial number tracking
- ▶ Scheduling
- ▶ Proof of delivery
- ▶ Document links
- ▶ Rebate management
- ▶ Flexible inventory replenishment
- ▶ Vendor pricing updates
- ▶ Integrated EDI

## HVAC Distributors Boost Growth With Epicor Prophet 21

Today's leading HVAC distributors—including InSCO Distributing, Gensco, Century Holdings, Adel Wholesalers, Service Supply of Victoria, and more—trust the Epicor Prophet 21 enterprise resource planning (ERP) solution to manage their business efficiently. Epicor is an active member of leading trade associations such as the HARDI, WIT, AHR, Embassy Group, BlueHawk, and other associations and buying/marketing groups. Our experts have spoken at many industry conferences and have written articles for Supply House Times, The Wholesaler, Distribution Trends, Plumbing Advocate, and other industry publications. Additionally, because Epicor intends to provide HVAC distributors with the best solutions to help them meet their business goals, we regularly seek out the input of our HVAC customers in the development of our solutions and services.



## In Your Industry

As an HVAC distributor, you face new challenges every hour of the day. You might serve contractors before dawn, deal with puzzled homeowners at noon, and ship everything from furnace control boards to gas valves until closing time. You need an ERP system that helps you meet the industry-specific challenges you face on an hourly basis. Epicor provides that solution with the front counter capabilities to service walk-in customers, the features essential to handling dozens of manufacturers' rebates, and functionality designed to help you never miss a sales opportunity.

## A Comprehensive Solution

With more than a half-century of distribution experience, Epicor helps distributors grow sales, improve margins, and increase productivity with ERP systems that can help keep them healthy and thriving in today's highly competitive marketplace. Prophet 21 combines proven distribution expertise with an end-to-end, web-enabled infrastructure and modern technology stack. Cloud and on-premises deployment options are available, and it's easy to migrate from one deployment choice to another as your business needs change.

Prophet 21 enables your most critical business areas to work more efficiently with features that include:

- ▶ Customer Relationship Management
- ▶ Order Management
- ▶ eCommerce
- ▶ Inventory Management and Purchasing
- ▶ Wireless Warehouse Management System
- ▶ Finance and Accounting
- ▶ Manufacturing
- ▶ Service and Maintenance
- ▶ Business Intelligence
- ▶ Enterprise Content Management

You need a technology provider that understands HVAC distribution. You must also choose a business partner with a vision to help guide you into the future. Epicor offers both. When you partner with Epicor, you can expect leading technology solutions and professional services, as well as the industry-specific functionality you need to drive your business.

## Quotes and orders

Your order management processes directly affect your customers and how they view your business. Customers demand faster, better service, and will go elsewhere if you can't meet their needs.

Prophet 21 enables you to complete the entire order entry process from one screen. You can:

- ▶ Enter quotes and orders
- ▶ Convert quotes to orders
- ▶ Check stock
- ▶ Expedite orders
- ▶ Search price and availability requests
- ▶ View past invoices
- ▶ Verify shipping preferences

Whether orders are entered at the counter, remotely via a mobile computing device or laptop, or over the web, information goes directly into your Prophet 21 solution for faster processing—eliminating manual work and rekeying errors.

## Front counter

Whether you have a small counter or a large customer self-service area, you'll need point of sale (POS) and front counter capabilities. Prophet 21 has the front counter tools necessary to quickly and efficiently handle that early morning rush. You can help any customer on the spot by accessing your inventory from the Order Entry screen. You can also offer a price, place the order, and then accept payment or record the transaction for invoicing.

To speed the order entry process, items can be manually entered or scanned using a wireless or USB bar code scanner. Customer credit can be checked on the fly, and notifications can be sent immediately to the credit manager in the event of an exception. Payments can also be entered on the transaction—including the ability to accept cash, check, or credit card payments. The Epicor integrated credit card processing solution<sup>1</sup> enables you to accept customer payments with credit or debit cards and receive immediate authorization. You can avoid the inefficiency and inaccuracy of separate terminals while simultaneously simplifying and lowering your costs to comply with the payment card industry (PCI) security standards.

Having proof of pick-up—such as the signature of the person who completes the pick-up on the invoice—can prevent messy disputes and expedite payment. Front Counter Signature Capture uses a simple, easy-to-install capture device that integrates with the Prophet 21 Order Entry module to instantly provide you with a permanent record of what left the warehouse, when, and with whom.

## Order history/previous requests

How often do you deal with customers who ask for the same item they purchased in the past? When you ask for more specific information, do they only remember a portion of the item information, the quantity, or the date they bought it? Prophet 21 includes a previous request search that allows you to view the customer's sales history. You can narrow your sales history search by date range or keywords and—in a few simple steps—add that item to the customer's current order. This saves time and eliminates trips to the file cabinet to thumb through old invoices.

## Customer-specific pricing

You can probably count on your core customers to order certain products from your company on a regular basis. It makes sense for you to reward frequent customers and encourage return business by offering special pricing. When a manufacturer offers you a price break, you may want to pass those savings on to your customers.

Prophet 21 gives you the flexibility to set prices as you see fit—including offering select customers preferred pricing, offering pricing based on quantity breaks, and setting promotional pricing—allowing you to maintain your margins while meeting customer and competitive demands. You can even set start and end pricing dates on a customer, product, or product group basis to meet contractual obligations or for limited-time specials.

## Contract pricing

For many customers, you'll want to negotiate pricing down to the item level—establishing fixed, time-based net prices on a SKU-by-SKU basis. Prophet 21 enables you to set up time-sensitive contract pricing for these customers. Contract pricing is integrated in Quote/Order Entry to ensure the customer gets the right contract price on each transaction. Additionally, starting and ending dates on contracts allow you to track when contracts are expiring and set up contracts that will automatically kick in on the starting date.

## Lot billing

Many contractors handling huge projects often want to order all the parts necessary for the job up front to ensure that everything they need is on hand when they need it. However, they want to receive the material in stages and to pay for it as they receive it. Lot Billing capabilities enable you to first deliver and bill the contractor for rough-in materials, then invoice and deliver finished goods at a later date.

In addition, you can use Lot Billing functionality when quoting orders. When contractors request quotes for large projects, you can give them one price for the entire lot or individual lot prices for rough-in or finished goods. Quoting items in this manner helps to prevent customers from shopping around and pricing goods individually.

<sup>1</sup> Not available in all countries

## Accessory and substitute items

With the built-in ability to suggest spelling items and substitutions, you can improve sales and make even your most inexperienced sales people sound like seasoned pros. Does every one of your sales and service representatives know—or remember—to offer “go with” items? Prophet 21 solves this issue by automatically suggesting products that go with items on a customer’s order—helping to increase sales and improve customer satisfaction.

In addition, Prophet 21 automates substitution processes. For example, if one of your most popular SKUs is backordered, the solution will remind your sales representatives to offer a similar—or identical—product. This feature helps reduce lost sales due to stock-outs.

## Assemblies

Assembly and bill of material functionality enables you to keep assemblies in your solution, at one price, and with one item code—eliminating the need to reenter a long list of line items each time you sell and assemble the items. This saves order-entry personnel time and helps prevent costly errors and mix-ups. Customer service representatives can also increase sales by up-selling assembled or manufactured products when customers request groups of items.

The same functionality can also take the guesswork out of determining how many items or kits you can assemble with what you have in stock. When your customer calls to request an item with more than one part, the solution searches your database, finds all the components necessary to manufacture a kit or assembly, and calculates the least common denominator of these pieces. In seconds, customer service representatives know exactly how many of a kit they can offer your customers—without taking a walk to the warehouse to manually find and count SKUs.

## Serial number tracking

Important for recalls and record-keeping purposes, tracking serial numbers can be a big part of your business. Prophet 21 allows you to record the serial numbers on any item in your warehouse and offers flexibility in how you track this information. You can choose to record item serial numbers for both inbound and outbound transactions. This gives you full visibility of serial numbers through every step in the process. Optionally, you can choose to only track serial numbers on outbound transactions—eliminating the need to enter this information during receiving.

## Scheduling

Even though contractors order everything at once, common sense dictates that rough-in items need to arrive at a job site before finished goods. After all, rough-in items are often installed weeks before the fixtures—especially on large projects.

With Prophet 21, you can easily and efficiently handle even the most complicated release schedules. Simply set release dates for groups of items for your customers’ jobs so the right products are ready for shipment or pick-up at the right time. This improves customer services and reduces confusion in the warehouse.

## Proof of delivery

Epicor Mobile Proof of Delivery is an integrated mobile companion for your Epicor system that delivers new levels of service responsiveness for efficient deliveries and pick-ups. With your choice of mobile device, you can maximize the effectiveness of your delivery resources while providing reliable, documented drop-offs and pick-ups.

Mobile Proof of Delivery puts virtually every delivery detail in the palm of your driver’s hand. Drivers can efficiently complete their delivery tasks using GPS location maps for fast, accurate service. From their mobile device, drivers can also add important delivery notes or log issues—keeping your customer and business informed of delivery details.

## Document links

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

Prophet 21 document links allow you to connect maintenance and transaction records to any compatible file on your network—from vendor invoices and customer purchase orders, to specifications and material safety data sheets (MSDS). You can even scan and save handwritten letters and faxed communications in the system or link to emails that relate to specific orders. Because your employees will have better access to important customer and product information, service can also improve. In addition, because they can email or fax the documentation directly from Prophet 21, your employees can simply click on a link to those documents and send them instantly.

## Rebate management

Many top vendors offer rebates that help distributors maximize profits. Robust rebate functionality helps you manage these rebates and take advantage of anything your manufacturers might offer. You can track vendor rebates electronically for more accurate books and a healthier bottom line. Simplify the often-tedious task of handling vendor rebates by automating the process. Each step—from negotiation, to receipt, and beyond—is recorded in real time and reflected in your solution's General Ledger and price schedules. This helps you track the rebates you've earned and lets sales and order entry staff always see proper gross margins to offer customers appropriate pricing. Additionally, your accounting staff will benefit from the ability to produce detailed, easy-to-understand rebate reports. Prophet 21 gives you the accurate, concise information you need to send to vendors to claim your rebates.

## Flexible inventory replenishment

Prophet 21 lets you choose from multiple inventory replenishment methods—including Order Point Order Quantity (OPOQ), Min-Max, Economic Order Quantity (EOQ), and Order Up-To. This kind of flexibility allows you to lower carrying costs, minimize excess or obsolete inventory, improve cash flow, and increase customer service levels. In addition, you can use different replenishment methods for different sets of items, which is an invaluable tool for distributors.

## Vendor pricing updates

Updating prices in a timely manner is important to your business' health. Failing to update prices one month—or even one week—after a supplier sends a price update can drain thousands from your bottom line. The Pricing Service module makes maintaining an accurate item database and building new items into your solution easier than ever. It enables you to create new items and handle price updates quickly, easily, and electronically by importing data from vendors or third-party companies. A simple, easy-to-use mapping tool allows you to map the data provided by the vendor to the Prophet 21 fields. Additional tools built into the Pricing Service allow you to convert data if necessary. Using Pricing Service takes only a fraction of the time of manual data entry, thus simplifying the process and helping to reduce the chance of errors.

## Integrated EDI

Many of your customers and vendors will require you to communicate with them via electronic data interchange (EDI) expecting you to be able to receive and/or send the necessary EDI transactions. The volume of these transactions requires any EDI to be fully integrated with your business system.

Prophet 21 streamlines the transaction process by providing an easy-to-use interface for EDI transactions. This can reduce order and processing costs, as well as time spent manually processing the documents. The Prophet 21 Scheduled Import Service Manager (SISM) can be run to automatically import transactions directly into Prophet 21 for processing. The Edit Import Suspended report allows for the review of transactions prior to their import into the database or upon failure to import. Each outbound document can be set to automatically export to trading partners when the transaction is completed from within the Prophet 21 system—reducing the need for manual intervention.

## Technology That Enables Transformation

Today, you need a software solution that you can implement quickly without substantial cost to your business. Epicor Prophet 21 is designed to help your distribution business scale, change, and grow without major system modifications.

Prophet 21 combines proven distribution expertise with an end-to-end web-enabled infrastructure and modern technology stack—including HTML5, Angular JS, Microsoft®, .NET, and Microsoft SQL Server®.

Learn more about how Epicor Prophet 21 can help you grow your distribution business by contacting Epicor today.



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## About Epicor

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



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