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From the December 2005 [Review of High-End Accounting Software](#)

Epicor Financials Suite is part of the larger Epicor Enterprise product. Epicor Enterprise offers industry-specific solutions for financial services, professional services, manufacturing, pharmaceuticals, distribution, hospitality and entertainment, and nonprofit entities. The Epicor Financials Suite offers strong multi-currency and multi-company capabilities for international companies to consolidate across companies and currencies. The latest version is a very minor upgrade from previous versions.

Modules Available/Scalability – 5 Stars

The Epicor Financials suite is comprised of GL, AP, AR, cash management, asset management, currency management, advanced allocations, credit & collections, electronic funds transfer, lockbox, deferred revenue accounting, and financial reporting. The core application, GL, allows you to define an unlimited number of companies, account codes and up to 365 fiscal periods. AR lets you manage national accounts and large conglomerates as a whole, while keeping track of each individual store or subsidiary. The latest version enhanced the ability to enter transactions between organizations and on behalf of other organizations to be accounted for. A balance sheet and income statement can then be provided for each organization using the built-in reporting tools.

As mentioned above, Epicor tailors its product to the industry-specific needs of the customer. While it offers a wide variety of accounting modules, other integrated applications can also be added, such as Supply Chain Management,

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it can build in higher performance at a lower cost.

Ease of Use/Transaction Entry – 4 Stars

The program's user interface consists of a vertical shortcut bar, a multi-level tree-style menu, and a desktop or work area. The shortcut bar is used to activate the desired module, while the desktop area displays icons for that module's applicable Processing, Maintenance, Reports and Configuration items. The desktop is a drill-down Explorer-style screen that takes you to the detailed screens and reports, either by expanding the tree menu or by clicking on the folder icon that is displayed. This is all laid out in an intuitive manner that follows a consistent and predictable design, in spite of some novel icons used to denote modules and applications.

Data-entry screens follow standard Windows design, with record navigation buttons, standard drop-down menus and toolbars. There is some inconsistency within the data-entry screens, with some screens utilizing multi-tab dialog boxes while others use scrollbars that allow the input area to be larger than the viewable window. A "Zoom" button on the toolbar or a double-click in a lookup field opens a find box to query the underlying table records.

One function called the Business Intelligence Explorer provides a way to locate and view information about customers, vendors, invoices, vouchers and other information. Using this window, you can drill into additional detail. For example, from a list of customers, you can query directly to that customer's invoices and even down to the posted transaction details. The search can be saved or the results can be exported to Word or Excel.

Customization/Security – 4 Stars

Several features allow the user to customize the program to their preference.

The desktop can be customized by adding or deleting shortcuts to frequently

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are assigned specifically by company and application, which allows you to vary a user's permissions by company. For example, a user may have access to payroll for one company but not for another. These same permissions can now be established for groups, which, in turn, provides flow-through permissions to users based on group membership. :::

Integration/Import/Export – 4 Stars

Integration is provided among the various industry and functional suites provided by Epicor Enterprise. Epicor also works with a limited number of development partners to provide third-party add-ons for web-based tools such as customer queries, sales information and order entry.

The program offers an Import Manager, but I was unable to find information or Help files on this topic. (The company noted that the Import Manager User Guide is included on the product CD along with user guides for all modules.) Using the Business Intelligence Explorer mentioned above, you can export data to Microsoft Word or Excel or send it to another Epicor Business Intelligence Explorer user by e-mail.

Reporting – 5 Stars

Reports for each module are broken down into Operational, Analytical and Listings categories. Reports are driven by the Crystal Reports engine, all professionally formatted for preview, printing or export to a number of formats including *.PDF, *.CSV, *.RPT, *.DIF, Excel, HTML, ODBC, *.RTF and Word. Full report customization is available by purchasing a third-party report writer, such as Crystal Reports.

Support/Training/Help System – 3 Stars

Support is provided through the Help system, an online knowledgebase and the capability of chatting online with a sales rep. The company also boasts a team of over 340 product consultants and 265 support representatives around the world.

Epicor provides an “up-front guarantee” that the cost of implementation/consulting

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Microsoft SQL Server, but I find that it lacks some of the maturity and stability of a few of the competing applications. It is not a new product and should have long overcome these deficiencies. This review was performed via an online demo environment where I had full access to the product but where comprehensive user guides were not included. (The company noted that version 7.3.6 includes over 14,000 pages in user guides available on the CD that can be made available to users over a network and almost 17,000 Help topics in the software itself.)

2005 Overall Rating – 4 Stars

Technology

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