



DATASHEET

PO Collaboration

SourceDay + Epicor



Your Epicor ERP streamlines a lot of your processes, but when it comes to PO changes, your team is still stuck in manual work, like spreadsheets, emails, and Post-it notes. SourceDay leverages the power of your Epicor ERP through a robust integration that handles all communication of changes for you and your suppliers within one solution, so everyone is on the same page—all the time. By digitizing and automating the manual work your purchasing teams are doing, SourceDay makes your business stronger and more resilient.

Ensuring SourceDay is an expert on the Epicor ERP is a top priority for our team. We have a dedicated group of experts who are constantly researching and handling our strategic partnerships with Epicor partners to continue to be the most valuable addition to your ERP.

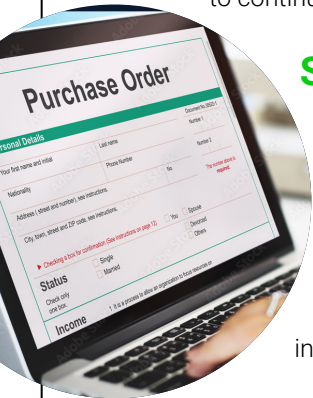
Stop Supplier Misses.

SourceDay's PO Collaboration solution helps manufacturers, wholesale distributors, and retailers make better direct materials purchasing decisions, save money, and meet more customer commitments. Epicor is only as good as the data that feeds it. Maintaining data in Epicor by emailing, calling, and faxing suppliers is impractical and often generates inaccurate or missing information.

Using manual processes to handle critical PO change data often results in data not being translated back into Epicor accurately, or worse, not at all. Inaccurate PO data causes a ripple effect throughout the organization, from production, planning, and scheduling to finance and sales. To put it simply, it can be a mess.

Without accurate PO data, manufacturers, wholesale distributors, and retailers are more susceptible to increased supplier expedited fees, late shipments, unpredictable inventory, working capital, and invoicing errors that lead to supplier overpayment, missed payments, or late payments.

SourceDay reduces these risks by offering a direct materials management platform that unites buyers and suppliers, creating supply chain visibility that you can trust.



Epicor Partner

Changes to pricing, quantities, and delivery dates are automatically updated in real-time to Epicor so PO data is 100% accurate.

Workflows Drive Performance

Automatically receive supplier PO acknowledgments and get notified by exception-based workflows that prompt you to take action when a PO has become critical or needs your attention.

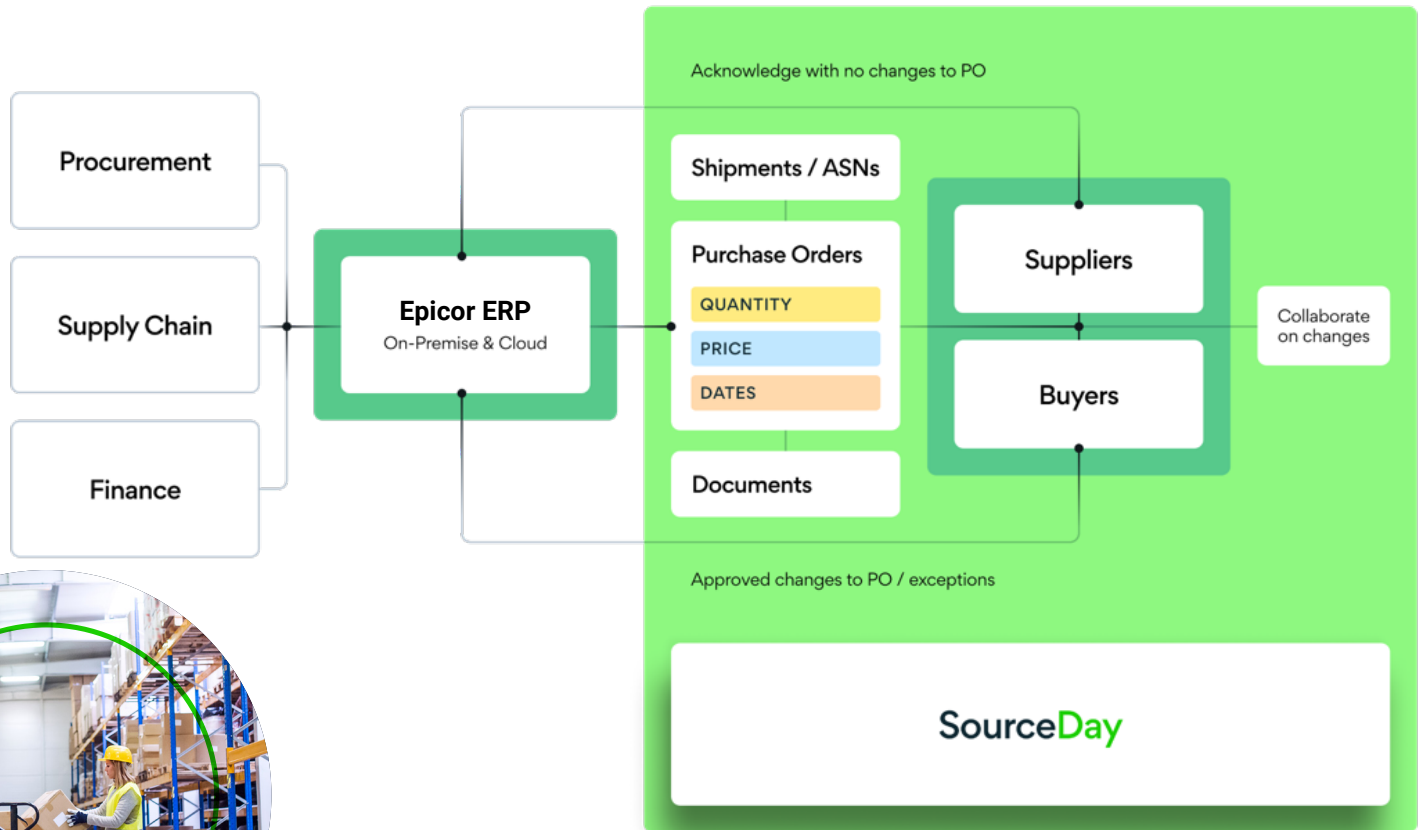
Guaranteed Supplier Adoption

SourceDay provides suppliers with free access and on-demand web resources so they can get the most value out of using the platform no matter their time zone.

Data & Insights

View a full history of every PO action taken inside the SourceDay platform, including a date and time stamp. Buyers and suppliers can leverage built-in supplier scorecards to pass ISO audits, easily share and tag documents to POs, and create critical shipping/ASN data.

SourceDay PO Collaboration Platform



Key Features

- Automate PO acknowledgments
- Built-in supplier scorecards
- Epicor Strategic Partnerships
- Easily expedite or de-expedite
- Free for suppliers
- Advance shipment notices
- Lightweight IT integration
- Notifications that drive action
- Bi-directional data sharing with Epicor
- PO audit trail
- Simple-to-use web-based portal
- Exception-based workflows



SourceDay

How **Everyone** Benefits

Procurement Team

- Receive timely PO confirmations and changes from suppliers
- Find discrepancies between PO and MRP data
- Hold suppliers accountable through performance-based grading
- Users and suppliers receive SourceDay on-demand walk-throughs & support

Buyers

- Accurate PO data on lead times increase on-time delivery
- Increased visibility into KPIs that help make better buying decisions: OTD, move-ins and move-outs, price changes, and more
- Quick onboarding to ensure speedy time to value
- Lightweight IT integration
- Buyers and suppliers receive SourceDay web-based on-demand walkthroughs and support

IT

- Quick integration ensures speedy time to value and ROI
- Lightweight IT integration with Epicor
- Training done by SourceDay's team to take pressure off your IT team

Executives

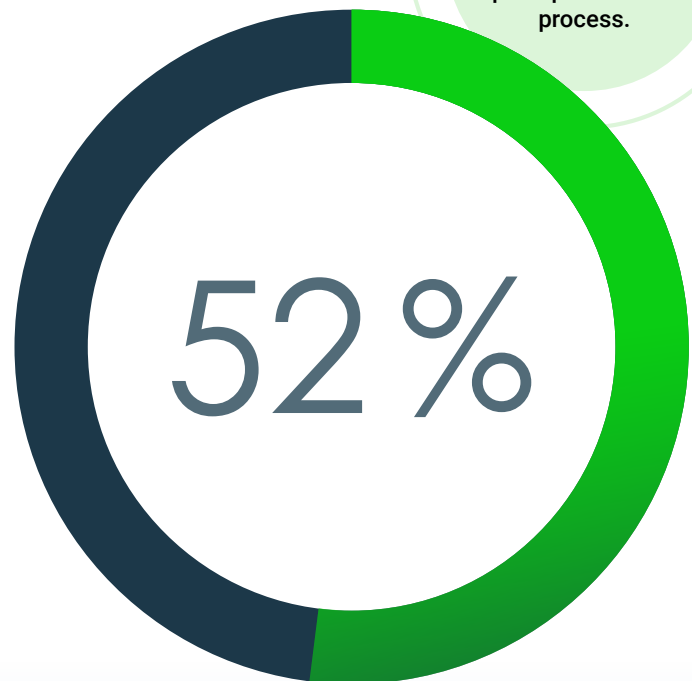
- Reduce business risk caused by external suppliers
- Decrease customer SLA penalties
- Lower inventory and increase inventory turns
- Increase ERP data accuracy for key business decisions

Manage by Exception

SourceDay's purpose is to help manufacturers, wholesale distributors, and retailers manage POs by exception. It allows users to quickly and easily identify and take action on critical POs that require more attention, like unconfirmed POs, high-priority orders, and POs with questions.

Instead of sifting through spreadsheets to see which POs are already late or about to be late, SourceDay automatically notifies you and prompts you to take action on those POs with your suppliers. **52% of PO lines will change** before price, quantity, and delivery date are finalized; SourceDay lets you focus on resolving those changes and trust that the other 48% are processed automatically.

52% of PO lines will change during the first mile of the direct spend procurement process.



"We can see shipping dates, shipping confirmations, what orders are hot, and which vendors need prompting—all in one place, visible to all stakeholders."



—Tina Grow, IT Director, Rocore

PO Dashboard

The PO Dashboard makes it easy for suppliers and buyers to make mass acknowledgments and collaborate on PO changes in a shared location. SourceDay guides users through the PO process with prescriptive workflows and notifications that help POs get confirmed faster. When a supplier makes a change, such as cost, quantity, or due date, the buyer is notified and has the option to approve or reject the changes. Once approved, all PO changes are automatically transmitted back into Epicor in real-time, so your entire organization can access accurate data.

Track your PO acknowledgments, status updates, and due dates from SourceDay's PO dashboard

The screenshot shows the SourceDay Buyer Dashboard with the following sections:

- POs Needing Attention:** 6 Updates, 37 Hot, 88 Pending.
- Purchase Orders:** Hot (\$2,490,161), Late (\$20,251,185), Radar (\$3,775).
- PO Exceptions:** Move Ins (\$3,238,908), Move Outs (\$2,057,248), Cancellations (\$1,778,905).

The 'Accept/Propose Changes' modal window displays the following information:

Order Details:

Buyer Name:	Item P/N:	Vendor Item P/N:	Item Description:	Quantity:
Shivendra Schiwani	2HPT7Y1DM2	IMXV4NF5B0	TEMP CONTROLLER, UNPOSDRAMMED	48.0EA
Quantity Received:	Quantity Shipped:	Unit Price:	Unit Amount:	Due Date:
6.0EA	6EA	\$94.95	\$4,537.68	03/31/2021

	Current	Last Cancelled	Buyer Proposed	Proposed Changes
Quantity	48.0	6.0	60.0	
Cost/Chk	\$94.95 EA	\$94.95 EA	50.0	EA

SourceDocs

Document Sharing

SourceDay's PO solution allows the sharing of documents bi-directionally. Users can attach documents to a PO, a PO line, a particular SKU, or individual suppliers in SourceDay to help prevent costly supplier disagreements, reducing material scrap from wrong revisions, and reducing costs with rework and returns. Within SourceDay's platform, buyers and suppliers can easily share and collaborate on schematics, drawings, Gerber files, CAD files, solid works files, submittals, MSDS sheets, certifications, and more. Suppliers can share shipping documents, CoCs (Certificate of Conformance), or COs (Certificate of Origin).



Actions	Supplier	Description	Content type	Tags	Associations	Uploaded
Attach	PO	test	application/msword		Suppliers Items PO Lines	05/02/2018
Detach	PO Line	test	application/msword	test	Suppliers Items PO Lines	06/14/2018
Delete	Items	Bob... c19b2372-6950-43a5-aa2-695046c80878s.pdf	application/pdf		Suppliers Items PO Lines	04/16/2020
		Othernet_Cable.jpg	image/jpeg		Suppliers Items PO Lines	11/11/2020
		Bob... c19b2372-6950-43a5-aa2-695046c80878s.pdf	application/pdf		Suppliers Items PO Lines	08/18/2020
		SourceDay_PO_Line_Import_Template_4.xlsx	application/excel		Suppliers Items PO Lines	03/09/2022
		Test_for_PMS3442318.docx	application/msword		Suppliers Items PO Lines	07/11/2022

Attached to Lines
PMS3442318-L2-90

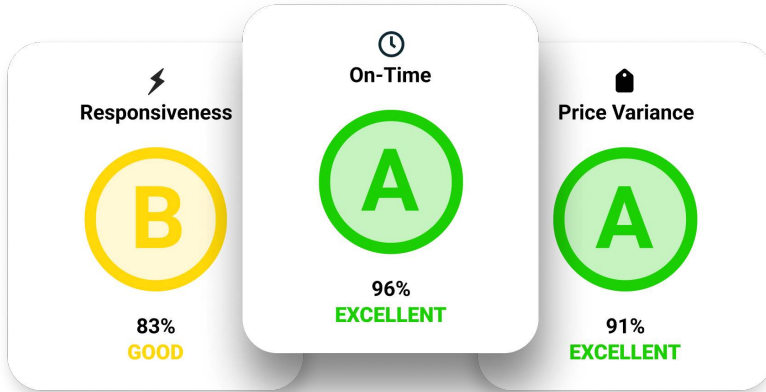
Shipments Visibility

With SourceDay's shipping functionality, buyers gain visibility to vital shipment data and actual delivery dates. Once ready to ship, suppliers complete ASNs within SourceDay's platform and specific shipping info such as quantity, lot number, tracking number, and PO number. Receiving teams can plan for deliveries and work more efficiently with this readily available data.

Shipped	Shipment Number	Packing Slip Number	Ship Date	Box Quantity	Quantity Per Box	Line Quantity	Container ID	Bill Of Lading	Means
Print	454769	12145897	06/04/2022	2.0	11.0	22.0	1224578	BDL3455	
Packing Slip	4789	12145897	06/04/2022	2.0	10.0	20.0	1224578	BDL3455	
Shipping Label			05/17/2022	1.0	23.0	23.0			truck
Print			05/17/2022	1.0	10.0	10.0			truck
Print			04/15/2022	1.0	128.0	128.0			
Print			04/15/2022	1.0	198.0	198.0			
Print	987987		04/06/2022	1.0	55.0	55.0			Track
Print	123123		04/06/2022	1.0	60.0	60.0			Track
Print	123456	123456	04/15/2022	1.0	90.0	90.0	654321	123	
Print			02/04/2022	1.0	1.0	1.0			
Print			02/04/2022	1.0	5.0	5.0			

Scorecards

In addition to improved document sharing and access to PO history, SourceDay's PO Collaboration includes a built-in vendor scorecard. Hold your suppliers accountable by measuring metrics like price variance, on-time delivery, and responsiveness.



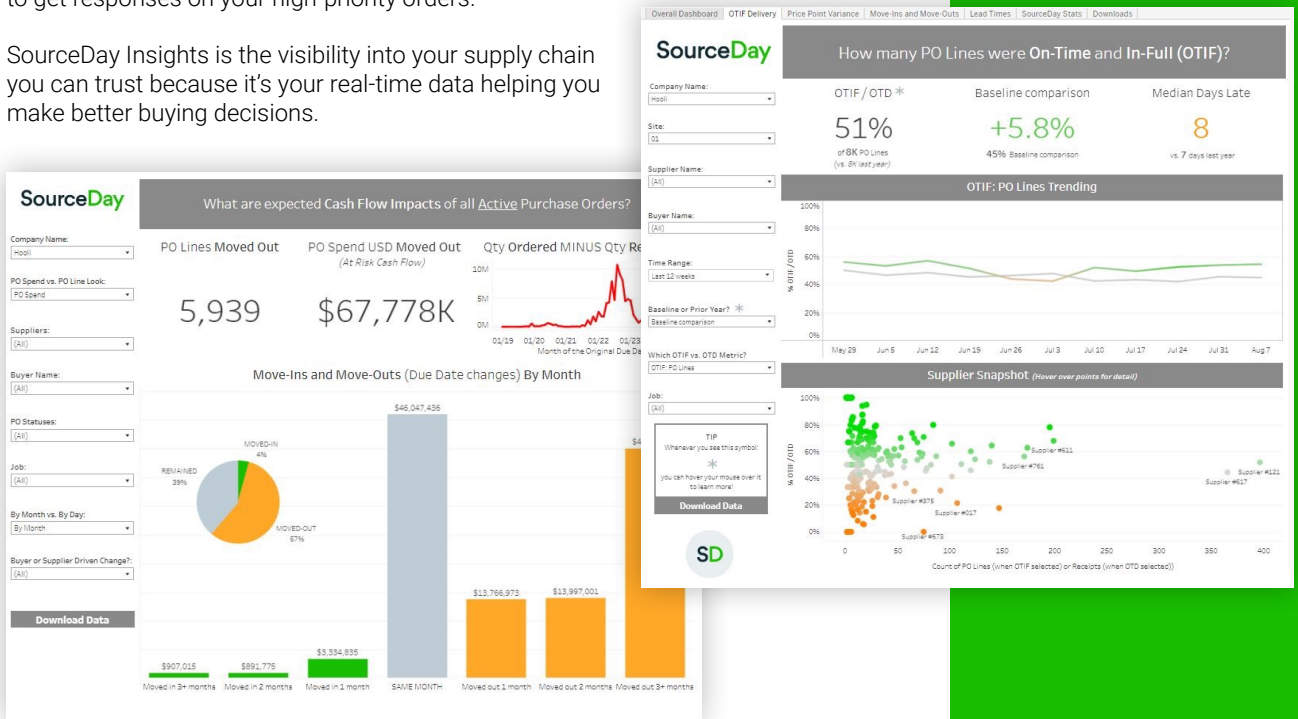
SourceDay Insights

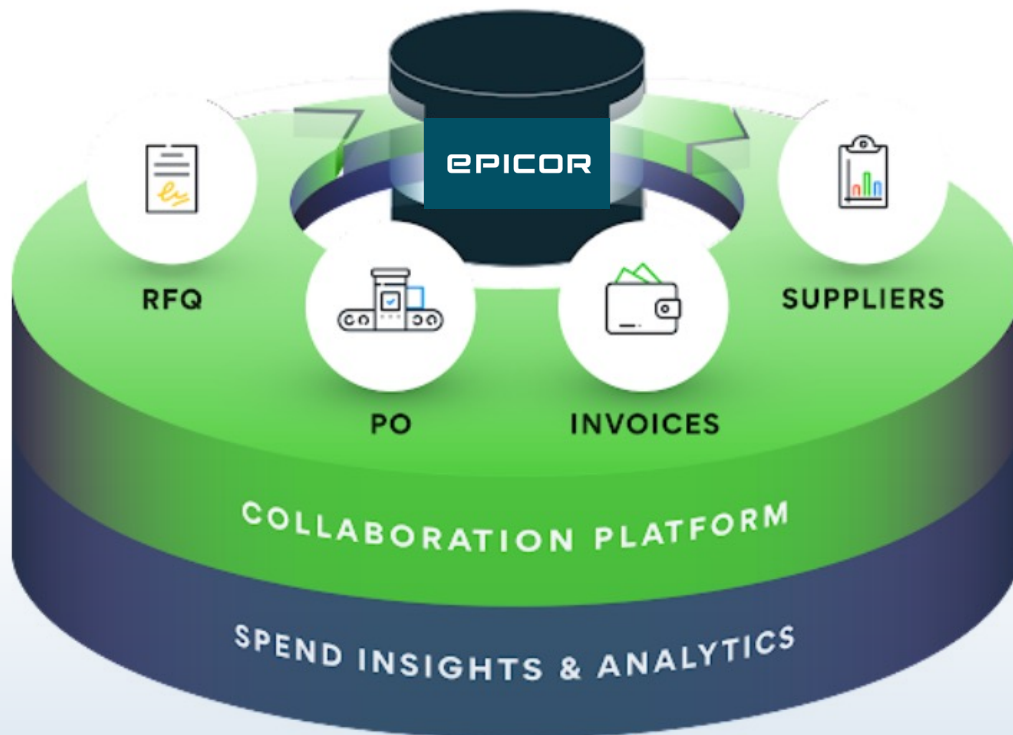
Visibility you can trust

Stay up-to-date on the most important suppliers to your business with insights into KPIs like On-Time In Full (OTIF), Cash Flow Protection, Move-Ins and Move-Outs, and Demand Planning.

What's even better, you can measure productivity and efficiency with concise data and know where changes to your process can make the most significant impact. Take a deeper dive into how your team and your suppliers are using SourceDay, the number of changes per PO, and how long it's taking to get responses on your high-priority orders.

SourceDay Insights is the visibility into your supply chain you can trust because it's your real-time data helping you make better buying decisions.





**Extend the power of your direct materials supply chain data
with all SourceDay's PO Collaboration platform**

The SourceDay platform provides teams with a supplier collaboration ecosystem from request for quote all the way through to payment processing to ensure you have total visibility in your supply chain that you can trust.

**Ready to learn more about PO Collaboration?
Schedule a demo with a specialist on our team to get started.**

SCHEDULE A DEMO