


	SaaS Financial Reports by EFP	SaaS EFP BASIC	SaaS EFP STANDARD	SaaS EFP THE WORKS	On-Prem EFP MID	On-Prem EFP MAX
	2022 Plan	2022 Plan	2022 Plan	2022 Plan	2022 Plan	2022 Plan
FEATURES AND LIMITATIONS BY PLAN						
Financials - All the Basic FP&A features						
Financials Budgeting	NO	YES	YES	YES	YES	YES
NEW: Machine Learning available in Budgeting & Forecasting	NO	YES	YES	YES	-	-
NEW: Machine Learning usage days per year included in plan	NO	5	50	Unlimited	-	-
Web Financials Reporting w/ Report Wizard	Advanced	Advanced	Advanced	Advanced	Basic	Basic
Native Excel Financials Reporting	-	Standard	Advanced	Advanced	Advanced	Advanced
Personalized multi-page Financial Dashboards	Standard	Standard	Standard	Standard	-	-
In-line analytics in web reports	Standard	Standard	Standard	Standard	-	-
Download Web reports into Excel	YES	YES	YES	YES	-	-
Subscribe users to scheduled reports	YES	YES	YES	YES	-	-
Cash Flow automation	YES	YES	YES	YES	YES	YES
Drill Down to Financial transactions	YES	YES	YES	YES	-	-
NEW: Direct Drill Down beyond GL including Periodic Postings *1	YES	YES	YES	YES	-	-
General Ledger Connection	YES	YES	YES	YES	YES	YES
Book Publisher for distributing Excel/ PDF reports	-	-	YES	YES	YES	YES
Text Comments (Budgets and Reports)	-	Basic	Advanced	Advanced	Advanced	Advanced
Server based Business Rules Automation	YES	YES	YES	YES	YES	YES
Budget Workflow	-	Advanced	Advanced	Advanced	Basic	Basic
NEW: Personalized multi-page Dashboards with Filters	Standard	Standard	Standard	Standard	-	-
Multi-level approval	-	YES	YES	YES	2 levels	2 levels
Security and organization setup	Advanced	Advanced	Advanced	Advanced	Standard	Standard
Multi-role stakeholders w/ delegation	YES	YES	YES	YES	-	-
Scenario management	Advanced	Advanced	Advanced	Advanced	Standard	Standard
User Management	Standard	Standard	Standard	Standard	Basic	Basic
Financials - Enterprise features						
Multi-Company Consolidation Eliminations	YES	YES	YES	YES	YES	YES
Multi-Currency	YES	YES	YES	YES	YES	YES
Reporting Currencies (unlimited Functional/ Transaction currencies)	1	1	Unlimited	Unlimited	Unlimited	Unlimited
Multiple Hierarchies for Accounts and other dimensions	YES	YES	YES	YES	YES	YES
Included Legal Entities that can be set up in System	1	1	10	Unlimited	10	Unlimited
Advanced Excel Input Sheets & Reports	-	-	YES	YES	YES	YES
Advanced Financials Pack (see below)	-	-	Add-on	YES	Add-on	YES
Advanced Consolidation Pack (see below)	-	-	Add-on	YES	-	-
Audit Trail	-	-	-	YES	YES	YES
Beyond Financials - Epicor & non-Epicor Data Sources						
Profitability Analysis Pack (see below)	-	-	Add-on	YES	-	-
Sales Pack (see below)	-	-	Add-on	YES	Add-on	YES
Commission calculation	-	-	-	YES	-	-
Add'l Models extending to any Process/ Data Source	-	-	-	Unlimited	-	Unlimited
Reporting for any selected data/ models	YES	YES	YES	YES	YES	YES
Budgeting/ Forecasting for any selected data/ models	YES	YES	YES	YES	YES	YES
SQL integration to other data sources	-	-	-	-	YES	YES
On-premise connector for selected Models	Included	Included	Included	Included	-	-
Business Rules	Pre Built	Pre Built	Advanced	Advanced	Standard	Standard
Inter-model Business Rule and Logic	-	-	YES	YES	YES	YES
Number of Source Systems supported	1	1	1	Unlimited	1	Unlimited
Number of Environments in EFP	1 (Production)	1 (Production)	2 (Prod + Dev/Test)	4 (Prod, Test, Dev, UA)	2 (Prod + Dev/Test)	4 (Prod, Test, Dev, UA)
SaaS instances (advanced in-group separation)	1	1	1	5	-	-
Integration						
Epicor Kinetic using REST integration	YES	YES	YES	YES	-	-
NEW: Epicor P21 using REST integration. Requires P21 Middleware.	YES	YES	YES	YES	-	-
Epicor Kinetic, Enterprise / ET, iScala using Azure replication	-	-	YES	YES	-	-
Epicor Kinetic, Enterprise / ET, iScala using SQL integration	-	-	-	-	YES	YES
Data upload from any system	YES	YES	YES	YES	YES	YES
NEW: Azure AD integration - SSO	-	-	-	YES	-	-

	SaaS Financial Reports by EFP	SaaS EFP BASIC	SaaS EFP STANDARD	SaaS EFP THE WORKS	On-Prem EFP MID	On-Prem EFP MAX
	2022 Plan	2022 Plan	2022 Plan	2022 Plan	2022 Plan	2022 Plan
FEATURES AND LIMITATIONS BY PLAN						
Security						
Fully configurable security on user/ group level	YES	YES	YES	YES	YES	YES
User Access						
Web User Interface	Advanced	Advanced	Advanced	Advanced	Basic	Basic
Microsoft Excel (Office 365 only - latest version)	YES	YES	YES	YES	YES	YES
Legacy Excel support - Microsoft Excel 2013 or later	-	-	YES	YES	YES	YES
<i>*1 Requires REST connection to Epicor Kinetic</i>						
ADD-ON PACKS TO ABOVE PLANS						
Advanced Financials Pack						
Accounts Receivable (AR)						
Accounts Payable (AP)						
AR & AP personalized multi-page dashboards (only SaaS versions)						
Human Resources (HR)	-	-	Add-on	Included	Add-on	Included
CAPEX (rule & input sheet - on-premise only)						
Fixed Assets (FA) (module - SaaS versions only)						
Virtual Segments in GL (like Customer & Supplier) (only SaaS versions)						
Advanced Consolidation Pack						
Advanced Eliminations						
Intercompany Matching including transaction currency						
Multi-Group and Multi-Level consolidation						
Configurable consolidation rules with automated journal						
NEW: Manual top-side Journal entries with Excel import option	-	-	Add-on	Included	-	-
Advanced Currency handling including automated CTA journal						
Partial Ownership / Equity Method						
Complex ownership over time						
Sales Pack						
Sales Process by day (Orders, Invoices, customers, products)						
Sales Budgeting by Month or Day, Product, Customer						
Sales personalized multi-page dashboards (only SaaS versions)						
Advanced Sales Statistics and Reporting	-	-	Add-on	Included	Add-on	Included
COGS separation into cost buckets (Labour, Direct Cost, Material etc.)						
Sales Commissions						
Including both Orders and Invoices						
Profitability Analysis Pack						
Multi-dimensional allocations for profitability analysis						
Profitability by Products, Customers, Departments and more						
Daily automated Analysis	-	-	Add-on	Included	-	-
Virtual Segments in GL (like Customer & Supplier)						
Microsoft Azure Data Connect						
Provides EFP data as secure native Tabular data source in Azure						
Additional analysis capability using Power BI, Excel or other tools	-	-	Add-on	Add-on	-	-
Licenses for Power BI or other analysis tools needed not included						

About Epicor Financial Planner

Epicor Financial Planner (EFP) delivers full financial reporting, planning, budgeting, performance management, and consolidation capabilities that complement your selected combination of ERP and line of business systems. It is designed to support a multitude of moderately complex to very complex business issues and is designed to scale as your business grows in revenue and complexity. To see a demo of Cloud EFP today or to inquire about its pricing, please email info@dspanel.com or speak to your Epicor Account Manager. You may also visit www.efpcloud.com for more info.

Contact us for more information on Epicor Financial Planner and services

 (+46)8.669.0340

 info@dspanel.com

 www.efpcloud.com