Epicor ERP 10.2.500

Release Guide

EPICOR.

Forward-Looking Statements

Certain statements in this pre-release guide constitute forward-looking statements including statements regarding the latest product release, release dates, expected future functionality and benefits therefrom, and other statements that are not historical fact. These forward-looking statements are based on currently available competitive, product and economic data together with management's views and assumptions regarding future events and business performance as of the time the statements are made and are subject to risks and uncertainties. Actual results may differ materially from those expressed or implied in the forward-looking statements. As a result of these factors the business or prospects expected by Epicor as part of this release may not occur. Epicor undertakes no obligation to revise or update publicly any forward-looking statements except as required by applicable law.

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Executive Overview

Many businesses today are making investments in research and development around the latest technology buzzwords such as cloud, mobile, artificial intelligence (AI), and internet of things (IoT). For others without the capital to invest in these ventures, the worry of getting left behind is real. The good news is that Epicor, your ERP technology partner, is making these investments in research and development on your behalf. Each release of Epicor ERP is designed to align these technologies to solve industry problems and support your competitive advantage in the global marketplace. Outside of this continued partnership, Epicor encourages our customers to get current and then stay current by upgrading to the latest versions.

Two current industry problems are attracting and retaining talent and understanding the future of work. According to IDC, an industry insider with research initiatives around the talent and skills gap issues, "The future of work isn't really about the future — it is about initiatives that companies need to pursue now," says Holly Muscolino, Research VP, Content and Process Technologies and the Future of Work. "IDC believes that organizations that embrace these technological changes and cultivate an agile, dynamic, worker experience-centric work environment will gain a competitive edge." (The Future of Work — The Future Is Now, March 2019)

Epicor ERP 10.2.500 Highlights

Experiences
- Kinetic Epicor Collaborate
- Kinetic Mobile Warehouse
- Kinetic EDD Uplift
- Epicor Kinetic Preview
- Epicor Virtual Agent Skills

Industry
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- Advanced MES 8.3
- CRE Support for Level 3 Compliance
- Mobile Time & Expense Enh.
- DocStar ECM 19.1

Global
- Compliance Engine Enh.
- 13 Country CSF Updates
- Australia & Canada Datacenters

Cloud
- Australia & Canada Datacenters
- Epicor Collaborate
- Epicor Service Pro
- Cloud ERP Custom Data for EDA
- Cloud Deployment Accelerators
- Epicor Functions

The latest release of Epicor ERP, 10.2.500, continues our **investment in ERP experience** by expanding the offerings with the Kinetic Design System and **strengthening cloud migrations** to make it even easier for our customers transitioning to the cloud. In the last year, many customers chose cloud over on-premises deployment, and we see more customers looking to cloud for an easier way to stay current, gain even greater OnDemand access to their ERP data and reduce their IT management footprint. A new cloud offering, Epicor Collaborate, offers **cloud-based digital messaging** and contextual ERP threads to which users can subscribe, making it easier for teams to digitally collaborate around ERP activities that support customers, suppliers, projects, processes, and more.

Protecting your investment globally ensures readiness for doing business today in regions around the world and offers future expansion opportunities. This release includes thirteen unique country-specific functionalities (CSFs) updates.

Guided by industry and customer feedback, this release includes these **targeted industry investments:**

▶ Epicor Advanced MES (Mattec 8.3), a new version that leverages Epicor IoT and more strongly integrates with Epicor ERP.
▶ DocStar ECM 19.1 offers expanded capabilities within DocStar ECM Forms 2.0 and the new ValiDate function.
▶ A new service offering, Epicor Service Pro, offers mid-market manufactures an industry-leading solution for Field Service.

At Epicor, we encourage our customers to **get current and then stay current**. We have made strategic investments to help our customers achieve this goal. Epicor ERP 10.2.500 introduces Epicor Functions, an expansion of Business Process Management (BPM) capabilities. Epicor Functions deliver reusable ERP custom processes that upgrade resiliently and are available for cloud users.

Please know that **you do not have to get to this exciting release, Epicor ERP 10.2.500, without help.** The Epicor Services and Support organization is ready to assist your upgrade. Start the process by contacting your customer account manager. We look forward to hearing from you.

Availability Matrix

This briefing may contain features that are not released yet. Be advised that the delivery date for general availability for some features may change and projected functionality may not be included in the release. ERP deployment availability refers to whether the solution will be available for Epicor ERP users in the cloud or on premises. This is regardless of how the solution itself is deployed. Planned availability refers to the projected plan and is subject to change. See the Forward-Looking Statements section in the disclaimer.

Each feature in the table below shows the projected date of planned availability.

Feature	ERP deployment availability	Planned availability	Generally available
Epicor Collaborate	Cloud, On premises	October 17, 2019	
New Epicor Virtual Agent (EVA) New Skills	Cloud, On premises	October 17, 2019	
Epicor DocStar ECM 19.1	Cloud, On premises	October 17, 2019	
Epicor Kinetic Preview – Reports and Processes	Cloud, On premises	October 23, 2019 *10.2.500.3*	
Kinetic Epicor Data Discovery	Cloud, On premises	November 20, 2019 *10.2.500.5*	
Epicor Data Analytics Improvements	Cloud, On premises	October 17, 2019	
CRE Support for Level 3 Compliance	Cloud, On premises	October 17, 2019	
Customer Part Cross Reference Improvements	Cloud, On premises	October 17, 2019	
Epicor Commerce Connect Improvements	Cloud, On premises	October 17, 2019	
Configurator Improvements	Cloud, On premises	October 17, 2019	
Quote Entry Unit Price Logic	Cloud, On premises	October 17, 2019	
Kinetic Epicor Mobile Warehouse	Cloud, On premises	October 17, 2019	
MRP Timeout Parameters	Cloud, On premises	October 17, 2019	
Transfer Order Shipments Default Location	Cloud, On premises	October 17, 2019	
Searching – Part Cross-Reference Lookup Search	Cloud, On premises	October 17, 2019	
Epicor Service Pro	Cloud, On premises	October 17, 2019	
Advance MES (Mattec MES) 8.3	Cloud, On premises	October 17, 2019	
Epicor Mobile Time and Expense Enhancements	Cloud, On premises	October 17, 2019	
One-time Supplier Bank for EFT Payments	Cloud, On premises	October 17, 2019	
AR Payment Instrument – Signee	Cloud, On premises	October 17, 2019	
AR Bank Receipt File Import Express	Cloud, On premises	October 17, 2019	
Booking Voucher Report to Include Dynamic Segment Elements	Cloud, On premises	October 17, 2019	
AR Electronic Invoicing	Cloud, On premises	October 17, 2019	

Electronic Compliance Engine Enhancements	Cloud, On premises	October 17, 2019	
NEW Tracker: Company Configuration Tracker	Cloud, On premises	October 17, 2019	
Functions	Cloud, On premises	October 17, 2019	
Improvements to Existing CSFs: UK, Argentina, China, India, Finland, France, Mexico, Malaysia, Portugal, Denmark, Germany, Norway, Sweden	Cloud, On premises	October 17, 2019	

General

Epicor Collaborate

Meaningful relationships exist across your company and are a great resource for serving customers and improving efficiency. When workers engage with each other to solve problems and innovate processes, your business benefits and strengthens. By integrating unstructured meetings and conversations with your critical business ERP data and by messaging worker conversations digitally, you can eliminate worker silos – giving your business a competitive advantage.

> *"The rise of the collaborative workforce and workspace is underway. Increasingly, tech-savvy mobile users are ready for collaborative workspaces with deep integrations to the software they use daily. Collaboration is a key element that helps create the future of work," according to Wayne Kurtzman, research director, IDC's Social and Collaboration Solutions.*
>
> *Worldwide Team Collaborative Applications Forecast, 2019–2023: Collaboration Growth Impacts the Future of Work*

Epicor Collaborate is a modern digital messaging tool built on a cloud platform. Easy to use and intuitive with hashtags and mentions, Epicor Collaborate offers contextual messages alongside ERP data. Workers can subscribe to ERP events and receive ongoing updates on ongoing customer shipments, job completion, customer credit hold change, invoice created, and 23 other options. When your employee teams communicate digitally, you increase customer responsiveness and satisfaction.
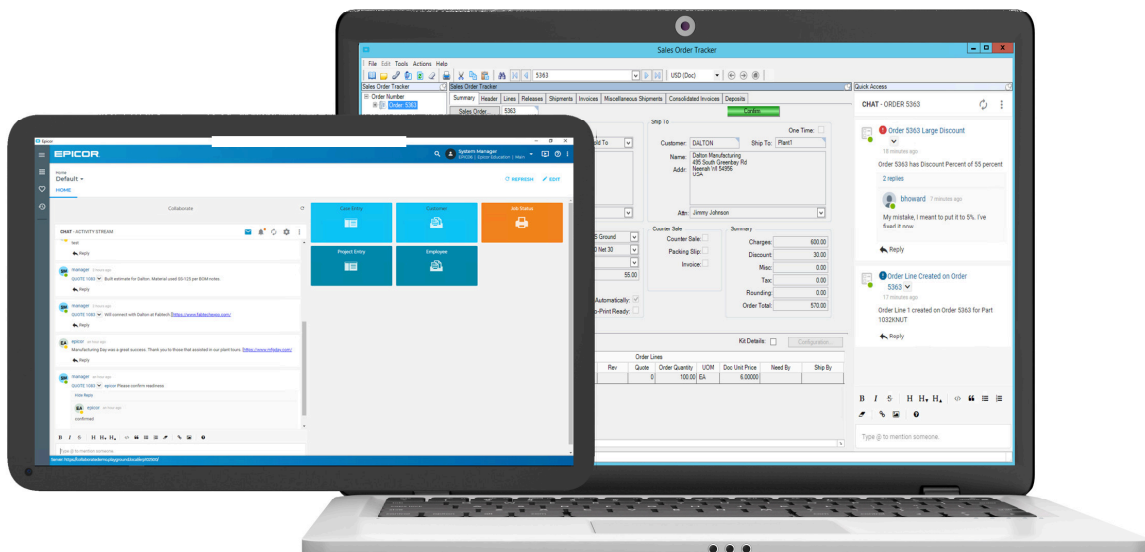
The Promise of Cloud

Built on the Microsoft® Azure® platform, Epicor Collaborate is a cloud solution that leverages powerful Azure tools to deliver security and scalability for your messaging needs. More importantly, the cloud platform provides access

to Collaborate on a desktop or a compatible tablet through the Epicor Home Page. Epicor Collaborate makes work happen, providing timely messages anywhere for rapid decision making.

Easy to Deploy

Both Epicor ERP in the cloud and Epicor ERP on premises are easy to deploy and integrate with Collaborate.   For cloud deployment, the Epicor cloud team does all the heavy lifting for you.

Simple to Learn. Designed for Business.

Collaborate contains many of the same interface conventions your employees use at home on their devices. This makes Collaborate simple to use and quick to learn. Since employees can adopt the features with near immediacy, Epicor Collaborate can offer a fast return on investment. Employees log into the Epicor ERP home page and select the Collaborate tab. They can then start messaging, subscribing to ERP events, and sharing knowledge. Epicor Collaborate functions are like other leading cloud-native digital messaging tools, but the feature is designed for heightened connectivity for Epicor ERP and your business.

Share Knowledge

Sharing knowledge helps businesses more easily onboard new employees and retain critical knowledge to support future operational efficiency. Making it easier for staff and departments to share information means that skills and knowledge can be pooled, leading to thorough problem solving, better project progression, and new ideas. Epicor Collaborate provides a robust repository of contextual and searchable messages to help workers find answers to repeatable customer issues, store and retrieve process knowledge, and maintain historical audits.

> *"True collaboration is more than just technology: It is refreshing the enterprise culture and willingness to share knowledge to win as a team, to be recognized for contributions, and to leverage people and technologies with agility and an implicit assumption that everyone can add value."*
>
> *Worldwide Team Collaborative Applications Forecast, 2019–2023: Collaboration Growth Impacts the Future of Work*

Operational Visibility

Subscribing to exceptions in ERP data helps business leaders respond to problems as they happen. For example, a stakeholder may subscribe to a customer or credit hold status. Once a credit hold message appears in their Collaborate message thread, stakeholders can message finance immediately to determine the reason and follow up with the customer.

Epicor Collaborate requires an additional SaaS subscription. Please contact your Epicor account manager for pricing and availability.

Additionally, Epicor Social, an Epicor module with similar functionality for on-premises deployments only, is moving into sustaining support as of the 10.2.500 release. Customers using this solution should plan their transition to Epicor Collaborate. When you transition, you can apply any unused maintenance for Epicor Social Advanced to your Epicor Collaborate SaaS subscription.

Epicor Virtual Agent (EVA)

Epicor Virtual Agent, or EVA, is an artificial intelligence personified bot that provides you access to your Epicor system. Users across the enterprise will be empowered by the context-aware natural language processing (NLP) of EVA, with whom they can converse through text or speech on their Android and iOS mobile devices.

EVA is powered in part by Microsoft Azure AI services, an affordable cloud solution that makes AI and cognitive technologies accessible and scalable for companies of all sizes. For Epicor users, the power of artificial intelligence cannot be understated. Today's digital economy is influencing the growing demands of end customers and B2B buyers for prompt, personalized service and rapid order fulfillment. To match these demands, companies are increasingly turning to AI and cognitive technologies. EVA can help solve problems today and lays a strong foundation for intelligent technologies that integrate with their Epicor system. The natural synergy of EVA and Epicor ERP is underscored by a recent survey of 1,100 CTOs and line-of-business executives, who concluded, "Enterprise software represents the most popular—and easiest—path to AI."[1]

EVA benefits:

▶ Most users know how to use a conversational UI works on their devices, ensuring high acceptance and use
▶ EVA is context-aware so commands can be brief; EVA will understand what you mean based on what you said before
▶ Modern technology will help you attract and retain new talent
▶ Users can execute ERP actions anytime, anywhere with text or speech on their mobile devices; you can send your reps into the field with just their phones
▶ New employees quickly onboard, requiring little training in ERP
▶ EVA places rich, formatted information at users' fingertips using the Kinetic Framework System Adaptive Cards, Users click buttons to send quick responses

EVA skills:

Just launch the EVA app on your device, complete the secure login, and start texting or talking. You can access parts, pricing, and other customer information. EVA initiates actions based on this information, such as creating a simple quote or converting a quote to an order. When you finish your inquiries and are ready to act, either press a button or say "create a quote for 40 of ABC part" (for example). Since EVA is aware of the conversation's context, the application knows which customer and item to quote.

EVA was released with Epicor ERP 10.2.400, and it included the following skills supported by voice or text:

▶ Identify a bin or warehouse location
▶ Get details of a bin's contents
▶ Gather a part's on-hand quantity in a warehouse
▶ Get a part's available to promise information for a certain date

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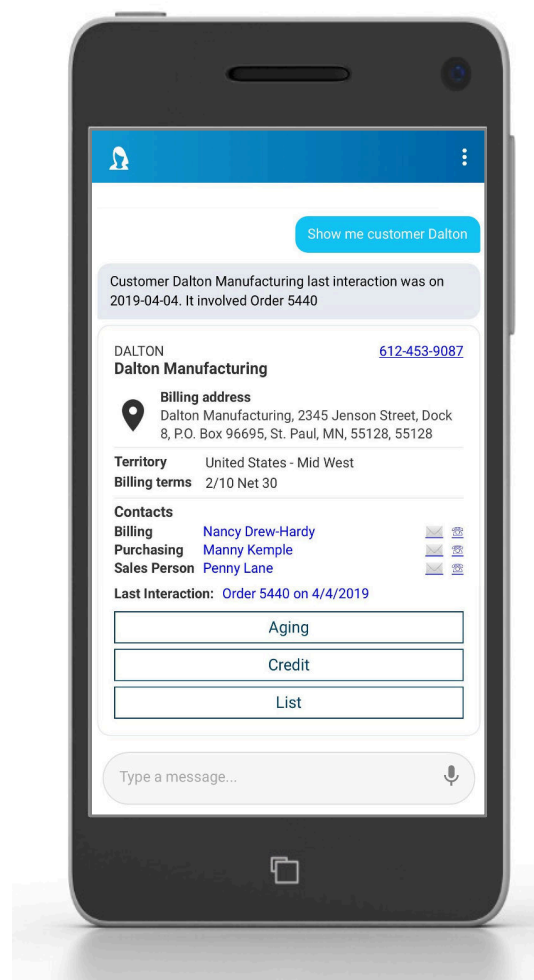
[1] "State of AI in the Enterprise, 2nd Edition" by Jeff Loucks, Tom Davenport, and David Schatsky, Deloitte Insights, 22 October 2018. https://www2.deloitte.com/insights/us/en/focus/cognitive-technologies/state-of-ai-and-intelligent-automation-in-business-survey.html

- ▶ Get details for a customer's primary contact
- ▶ Adjust a part's quantity in a location
- ▶ Sum approved purchases for a part for a certain date
- ▶ Get customer details that display in an adaptive card layout
- ▶ Get general part details that display in an adaptive card layout
- ▶ Convert an entire quote to an order
- ▶ Create a single-line quote
- ▶ Calculate the customer's price for a part quantity

The 10.2.500 release of EVA adds skills for supplier/purchasing and customer/selling transactions:

- ▶ Create a single-line purchase order
- ▶ List open purchase orders for a supplier
- ▶ Get purchase order details
- ▶ Get supplier details that display in an adaptive card layout

EVA Adaptive Card Functions

When you execute an EVA skill through voice or text, quite often an adaptive card returns with button choices for more functions. You can see a listing of these adaptive cards when you type **help** in the EVA app. The 10.2.500 release of EVA adds new adaptive cards with additional functions:

- ▶ View purchase orders for a supplier
- ▶ Approve purchase order
- ▶ View National Accounts for a customer
- ▶ The following customer credit functions enable authorized approvers to use their mobile devices when away from their office, alleviating hold-ups on the sales order approval process:
  - o Remove customer credit hold
  - o Add global credit limit value
  - o Add global credit detail value

Subscription requirements

Epicor is offering EVA for no charge through December 31, 2019, with no commitments. Follow the EVA Install Guide (located on EpicWeb) so that your company can get started using EVA today.

Commercial terms (pricing and licensing) are not yet available for this solution. For these details, contact your customer account manager when the free period ends.

Epicor DocStar® ECM 19.1

Lost, misfiled, and delayed approvals on documents cost organizations time and money. Remote employees, compliance and security issues add even more layers of complexity to an already-complex system. Moreover, with paper-based processes, lack of visibility into the status of cash —- position, workflow approvals, or changes to documents add to the difficulty of making the best decisions at the right time. DocStar ECM can help improve productivity and save costs by creating a paperless workflow. In fact, DocStar ECM is the only enterprise content management suite with packaged workflows deeply integrated to Epicor ERP that capture, validate, route, and automate document processing for both accounts payable and sales order entry.

DocStar ECM Suite Benefits

- ▶ Leverages smartphones and tablets by using a web browser interface for access anytime, anywhere
- ▶ Minimizes business risk associated with lost files
- ▶ Enables easy, secure file sharing
- ▶ Reduces learning curve with elegant, intuitive design

- Provides automation to route and process business documents more efficiently, faster, and more accurately
- Integrates to Epicor ERP for storage of documents and attachments, pre-built automated processing of documents for sales order entry and accounts payable, and additional custom workflow processing

DocStar ECM Suite Components

- **DocStar ECM*** – Enterprise content management starts with the core DocStar ECM concurrent user-based system. Available in the cloud or on premises, DocStar ECM provides the secure document repository, with powerful context searching, mobile access, version control, check-in and check-out, and document retention policies, to name a few.
- **DocStar ECM AP Automation for Epicor ERP** – Use this packaged workflow to automate processes and approvals for incoming accounts payable invoices into Epicor ERP from any source.
- **DocStar ECM Sales Order Automation (SOA) for Epicor ERP**—Use this packaged workflow to automate processes and approvals for incoming purchase orders—from any source— into sales orders in Epicor ERP.
- **DocStar Workflow** – Easily create your own workflows to process and route content for approval.
- **DocStar Intelligent Data Capture (IDC)** – Capture documents from virtually any input device in any location, with advanced optical character recognition (OCR), automated indexing, pattern matching, barcodes, and more.
- **DocStar ECM Forms –** Easily create and fill in online forms, instead of filling in and scanning paper forms, and store them in the DocStar ECM document repository. The form data can be integrated into any ERP or CRM system, with optional real-time workflow integration. While Epicor ERP has many applications that serve this purpose, such as Mobile Time and Expense, there will always be a need for ad hoc forms in a business; for example, employee requests such hardware, software, and office supplies.
- **DocStar PackageWorks –** Create document packages, such as required forms for shipping, and then at the appropriate time in the process, PackageWorks will collect the designated documents in the requested order and create a submission package to be e-mailed to a recipient, for example.
- **DocuSign® eSignature Connector** – DocStar ECM offers an embedded electronic signature capability using the DocuSign eSignature API. You can access DocuSign from within DocStar ECM ad hoc actions and workflow tasks to complete approvals and approvals in minutes—not days—by securely accessing and signing documents from virtually anywhere in the world. External, non-DocStar users can also be engaged by DocuSign into a signing ceremony.

*A pre-requisite for DocStar ECM is the Epicor ERP module Advanced Printing AKA "Advanced Printing and Routing (APR)." Epicor APR offers built-in, easy-to-use tools to quickly create, route, and format your reports and documents according to the various requirements of internal and external recipients. You can send order confirmations or invoices to customers, generate and submit required financial reports, deliver parts reports or pick-lists to your operations personnel, and with the addition of DocStar ECM AKA "Enhanced APR," store the reports and documents in a secure document repository.

DocStar ECM 19.1 Enhancements

DocStar ECM 19.1 is scheduled to be released at the same time as Epicor ERP 10.2.500. Enhancements include:

▶ **LAC Spanish –** DocStar ECM will be available in Spanish language for Latin American and Caribbean countries. Language is a user preference, so that each user can choose their preferred language from a drop-down menu on their main ECM screen. Please note that any custom field names, custom reports, custom workflows or other customizations will need to be rebuilt in LAC Spanish for those users.

▶ **DocStar ECM Forms 2.0 –** Most of these Forms enhancements were driven by user feedback and include:

  o **Form Sets –** You can build a group of forms that can be filled in together for rapid entry; for example, onboarding documents for Human Resources such as new employee info, emergency contact info, direct deposit info, and the like. You can set the sequence in which the forms appear and create conditions to decide which form should be presented next; for example, if the new hire declined insurance coverage, don't present forms related to insurance. Fields can be synchronized across forms so that the person filling in the form only need enter their phone number once, for example, and it appears on all the forms.

  o **Form Signatures –** After the form set has been filled in and the user clicks the Submit button, the form set can be programmed to present a signature box that the user can fill in with mouse or other input device. Their signature is then stored on the form.. *Note: this particular Form Signatures feature serves the purpose of acknowledging receipt and form completion, not to be confused with DocuSign eSignature, which will also work with DocStar ECM Forms, using Public Key Infrastructure (PKI), to provide the highest levels of security and universal acceptance and allow multiple parties including external non-DocStar users to participate in a signing ceremony.*

  o **Attachments –** No longer presented as extra pages in the form, attachments appear via ribbon bars that you click on to display them, making a neater, uncluttered view of the document for easy navigation.

  o **Field Validations –** This new feature set does much more than just set up the enforcement of required field entries. You can set up conditions to be evaluated, like summing line item prices and displaying a total, or true/false conditions that require additional detail filled in when a box is checked. It has conditions you can set up to control the appearance or behavior of fields based on the contents of other fields. Using the employee hardware/software request form mentioned earlier as an example, let's say an employee chooses "Hardware." A dropdown menu can display a static list of approved hardware choices, or it could even be a live lookup list to ERP or another data source.

▶ **Validate –** This is a new feature added to the core DocStar ECM product that verifies document integrity for all new documents added to the repository going forward. When a document is added, an encrypted hashtag is generated, like a "digital fingerprint" stamped with the contents and date and time of entry into the system. Each time the document is viewed, its hashcode is recalculated and compared to the original to validate no unauthorized modifications have been made, as indicated by a green Validate stamp. A document that fails the comparison will display a red Validate stamp. Validate ensures documents are tamper-proof and valid, while the recently introduced DocStar Connector for DocuSign eSignature does the same for electronic signatures on documents in DocStar ECM.
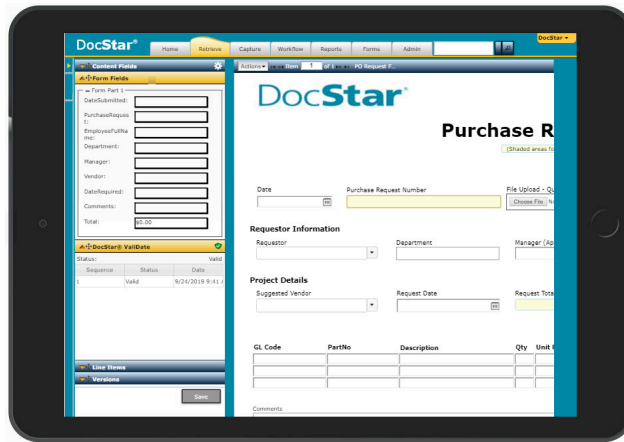
Migrating from Altec Advanced Print Management (APM)/APM+ to DocStar ECM

On November 1, 2018, a communication went out to all Altec APM/APM+ owners—on Epicor ERP 10.1.600 and higher—that support for Altec would be ending on November 1, 2019. Since then, Epicor has seen great success in migrating Altec customers to DocStar ECM, but this is not yet complete; therefore, the decision has been made to move Altec APM/APM+ to sustaining support roughly a year from now, on November 1, 2020. In other words, Altec APM/APM+ support will not end on November1, 2019 for any customer, but instead move to the Sustaining Support model a year from now. Because Sustaining Support will not provide active development or fixes for either the Altec product or the integration to Epicor ERP, nor allow the sale of additional Altec modules, we encourage all Altec customers on Epicor ERP 10.1.600 and higher to move to DocStar ECM to take advantage of new features and ensure business continuity. DocStar ECM is an Epicor owned product that will continue to be actively developed and enhanced for Epicor ERP going forward.

As a part of your maintenance policy—applicable only to Altec customers who continue to stay current on their maintenance contracts for their Altec products—Epicor is offering 50% off DocStar licenses for like-for-like migration to Epicor-owned* products in the DocStar ECM Suite. The basic migration path is as follows:

▶ **Altec APM** → migrated to Advanced Printing SVP (AKA "Epicor ERP Advanced Printing"), an Epicor ERP module at 50% off
▶ **Altec APM+** → migrated to APR Enhanced (AKA "DocStar ECM, Concurrent User") at 50% off
▶ **Altec AP Integration** → migrated to DocStar ECM AP Automation at 50% off
▶ **Altec miscellaneous add-ons** → migrated to DocStar ECM add-ons available at time of migration, at 50% off license price

> *Note: DocStar is available for Epicor ERP versions 10.1.600 and above. Some of these versions are also in Sustaining Support mode, but for purposes of migration, sales of DocStar ECM modules are permitted.*

*Third-party applications such as ReadSoft OCR, Artsyl IDC, or Ancora IDC are exempt.

For migration pricing details, contact your Customer Account Manager.

Epicor Kinetic Preview – Reports and Processes

More than a modern look and feel, Epicor Kinetic Design provides a simplified user interface that aims to automate critical business functions and improve end-user adoption. This approach makes using ERP software more intuitive, allowing users to focus on business while masking the complexity of a modern manufacturing business.

With 10.2.500, we are launching a Kinetic Preview Program where you can test drive the new reports and processes. Only standard reports and process screens are supported during the preview program. Customers with

minimal customizations in these forms who would like to experience the benefits of Kinetic can request access to the new reports and processes from their Customer Account Manager. For more information about the program, see the Kinetic Preview Program FAQ on EpicWeb.

Kinetic Epicor Data Discovery

Epicor Data Discovery (EDD) is a data visualization tool that displays real-time production data. With EDD, users can quickly spot areas of interest that they might have missed by just looking at rows and columns. In a Data Discovery view, users can set filters, measures, and dimensions to produce rich visualizations. They can create new views connected to their existing BAQs or, with the EDD Advanced license or subscription, connect to outside data sources. Epicor IoT widgets can also be viewed in EDD with the addition of a license or subscription for Epicor IoT

EDD Enhancement Highlights:

Epicor Data Discovery (EDD) uses the Epicor Kinetic Design System. 10.2.500 enhancements to Kinetic are reflected in EDD. This interface offers a unique functional and visual design. Epicor Kinetic simplifies daily tasks, enabling users to become more productive. Applications built with Epicor Kinetic Design System are fast and intuitive, as this interface design provides true ease of use. Epicor's priority is to develop new products and redesign existing ones through the Epicor Kinetic Design System.

Epicor Data Analytics Improvements

Epicor Data Analytics (EDA) is a Business Intelligence solution that delivers content packs for Epicor ERP financials, sales (with CRM quote pipeline), production, materials, project management, field service, preventive maintenance, and Epicor Mattec® (Epicor Advanced MES). Through this affordable, cloud-based subscription, EDA maintains the server and application and warehouses potentially massive amounts of current and historical data for recent and long-term trending analysis.

EDA's power is in its simplicity. The colorful chart and KPI widgets are easy to understand and filter. However, for many users, the strongest feature is each widget's underlying analysis grid. Users can rapidly focus on an area and even drill down into the ERP transactions.

- ▶ **EDA Data Designer enhancements for Cloud ERP Customers** -- EDA is a cloud-based data analytics solution that works with both on-premises Epicor ERP and Epicor ERP in the Cloud. Recent EDA improvements for Cloud ERP customers focus on enabling customization options. These improvements include customizing the Data Designer.
- ▶ **Dashboards flash on data update** -- Using dashboards on a big screen in your warehouse or office? This improvement means that widgets now 'flash' when the underlying data updates. You're always up-to-date, particularly for dashboards that progressively build throughout the day.
- ▶ **Widget - Last Updated**-- Users with live or frequently updating dashboards can now add details that show when a widget was last updated. This feature is useful for business-critical information on dashboards that contain widgets from multiple sources.

Sales and Marketing Management

Customer Part Cross-Reference Improvements, including Lookup Screen

Data access speed helps businesses serve customers better. The Customer Part Cross-Reference function is re-designed for greater agility and performance. It also includes a new Lookup Screen that automatically displays when multiple values of cross-reference are available. For sales orders, users can then select which part number to order.

Epicor Commerce Connect Improvements

Epicor Commerce Connect (ECC) 2.7.0 continues Epicor's investment in commerce solutions. Through ECC, Epicor users drive better digital experiences for customers, suppliers, and dealer networks. New ECC features tighten the underlying integration and offer greater flexibility for deploying ECC solutions. Specific new features:

- ▶ Dealer Network - Location Inventory Contact. By including greater contact location and owner customer information, businesses build close relationships with dealer contacts to improve service levels for end customers. Contacts are available across the Location Ownership Transfer, Location Ownership Tracker, and Replacement Part Entry programs. To ensure accurate delivery, Customer Shipment Entry displays the appropriate contact name specified in the location inventory address.
- ▶ Send Part Attributes to ECC. Part Attributes improve the search and retrieval functionality in the Commerce Site. Attributes within the Part Attribute sheet are now sent directly to ECC. These web parts attributes are:
  - o UOM
  - o Length
  - o Width
  - o Height
  - o Inner Diameter
  - o Outer Diameter
  - o Brand
  - o Sub Brand
  - o Category
  - o Sub Category
  - o Style
  - o Size 1
  - o Size 2
  - o Color
  - o Gift Card
- ▶ ECC Miscellaneous Charge Logic. Improving the visibility of miscellaneous charges cuts down on customer inquiries and allows a greater customer digital experience with 24x7 support. ECC response inquiry messages for Sales Orders, Quotes, and Accounts Receivable (AR) invoices now retrieve miscellaneous charges for both header and detail (lower level) charges. Customers can see both the miscellaneous charge totals and underlying detail.
- ▶ ECC Legal Numbers. If the posted AR invoice holds an assigned legal number, ECC now retrieves legal numbers from this invoice.

Configurator Improvements

Configurator flexibility improvements make it easier to build and maintain key configurations and respond to customer requests. Several 10.2.500 enhancements to the Epicor Configurator assist configuration designers:

- ▶ **Import Configurator** improves the ability to import configurations in multiple instances (pilot, production). Users do not need to contact the Cloud team to import these configurations.
- ▶ The Configurator Rules **Test Results** window only displays the Assembly (Asm), Operations (Opr), Materials (Mtl), or Resources (OpDtl) that satisfies the Keep When rule. If they contain lower-level elements, these are hidden.
- ▶ A new **Execute rules on part creation** rule condition was added to configurator Document Rules. Use this condition, for example, to add a new description while generating a part number. Document rules set the new part description when the Part Creation functionality executes, but they do not run for sub-configurators.
- ▶ The Code Editor and Expression Builder now include the **IsReconfigure expression.** They help you identify when records are reconfigured. The expression is an additional command you use to write logic when a configured quote, order, and so on is reconfigured. For example, a configured order already includes price, but you add the IsReconfigure logic to avoid the price recalculation process when you reconfigure the order again.
- ▶ Investing in purchasing an external disc array is a significant purchase. Configurator Entry includes the **Shrink Field Properties checkbox** that helps you reduce how much disc space is consumed. The checkbox dictates whether the field properties write all twenty-two nodes, correspond to all properties per control, or correspond to just the ones being used. For example, when you daily create one thousand configured quote lines, it causes your erp.cpvalueset table to grow in size and require more disc space. By activating this checkbox, you reduce this need.

Quote Entry Unit Price Logic

Process improvements in Quote Entry now make it easier to automatically tie unit price from expected quantity estimates. New rules to automate pulling in the unit price are available for:

- ▶ Expected >=1 – the Quantity Break with the highest Quantity <= Expected Quantity will be Used
- ▶ Expected Quantity = 0 - the Quantity Break for a Quantity of 1 will be used
- ▶ Expected Quantity > 0 and <= 1 and there is a Quantity Break with Quantity <= Expected Quantity, then that will be used. Otherwise, the Quantity Break for a Quantity of 1 will be used

Epicor® Payment Exchange - Support for Level 3 Credit Cards

Epicor can be your business partner in payment processing. There are many payment processors to choose from, but with Epicor Payment Exchange(EPX), you can work with one that understands the challenges of your business. At Epicor, we want to make payment processing seamless, so you can focus on caring for your customers and growing your business. But most importantly, we want to save you money.

Epicor Payment Exchange now meets requirements to process Level 3 credit cards to further reduce fees on credit transactions. Also, it aligns processes to the new rules set by Visa and Master Card and provides a card on file indicators on transactions. In addition, for eCommerce transactions, EPX lets FDMS know from which URL customers are processing credit card transactions. See the below Level to Level comparison.

Data Element	Level 1	Level 2	Level 3
Merchant Name	X	X	X
Transaction Amount	X	X	X
Transaction Date	X	X	X
Customer Code		X	X
Total Tax Amount		X	X
Zip Code			X
Invoice Number			X
Order Number			X
Freight Amount			X
Line items detail of Purchase			X

Material Management

Kinetic Epicor Mobile Warehouse

Epicor Mobile Warehouse uses the Epicor Kinetic Design System. This interface offers a unique functional and visual design. From the cloud to their devices, Epicor Kinetic enables users to become more productive by simplifying daily tasks. Applications built with Epicor Kinetic Design System are fast and intuitive, as this interface design provides true ease of use. Epicor's priority is to develop new products and redesign existing ones through the Epicor Kinetic Design System. Epicor Mobile Warehouse fully embraces this go forward design strategy.

MRP Timeout Parameters

Improved MRP processing timeout parameters offer greater choice for helping users fine-tune MRP performance. Using the web.config timeout-related parameters, users can set the MRPRowCount and MRP Command Timeout to either the **number of rows that sqlCommand affects or read each time and set the timeout before executing a command and generating an error.**

Transfer Order Shipments Default Location

New Transfer Order defaults make it easier to receive products from other sites. A new Order Shipment Location default indicates the warehouse/bin that will receive the receipts. To maintain receiving flexibility, Transfer Order Entry Line Detail offers new dropdown lists for Warehouse and Bin. These display in the Staging group box and they define the shipping location for the transfer order line.

Searching – Part Cross-Reference Lookup Search

Looking for parts wastes time. The 10.2.500 release includes a new Part Cross-Reference Lookup Search that makes it easier to find the right part in Part Tracker. Right-click any part field; from the context menu, select Part CrossRef Lookup. This search displays all possible cross-references (customer part, supplier part, manufacturer part, internal part cross reference, product codes) for a selected part. You can then select the one you need.
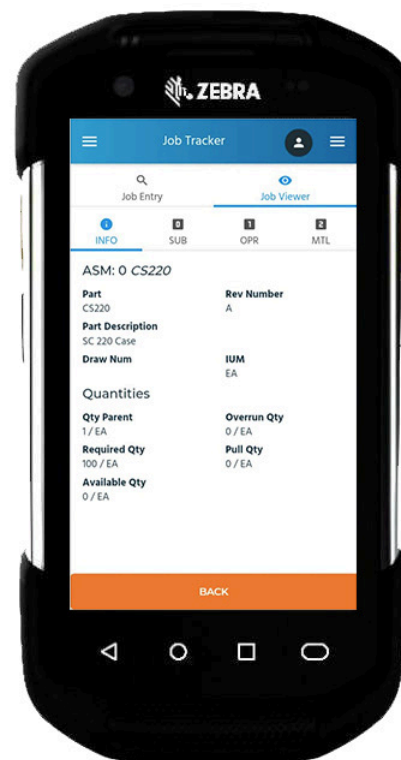
Service Management

Epicor Service Pro

Optimize Field Service Repair, Preventive Maintenance, Installation, and Inspection Operations

Service offerings provide businesses with a powerful differentiator and boost margins in competitive markets. Many manufacturers and distributors have service departments to take advantage of the benefits services offer. Epicor continues to invest in strategic service solutions, and we are happy to introduce a new partnership and offering focused on service for our key manufacturing markets. Introducing Epicor Service Pro.

Epicor Service Pro is a comprehensive, cloud-based service management, scheduling, and mobile application that helps organizations improve enterprise-wide field service management and increase mobile field workforce efficiency. From a single application, manage all field service activities—from calls, work orders, and assets, to
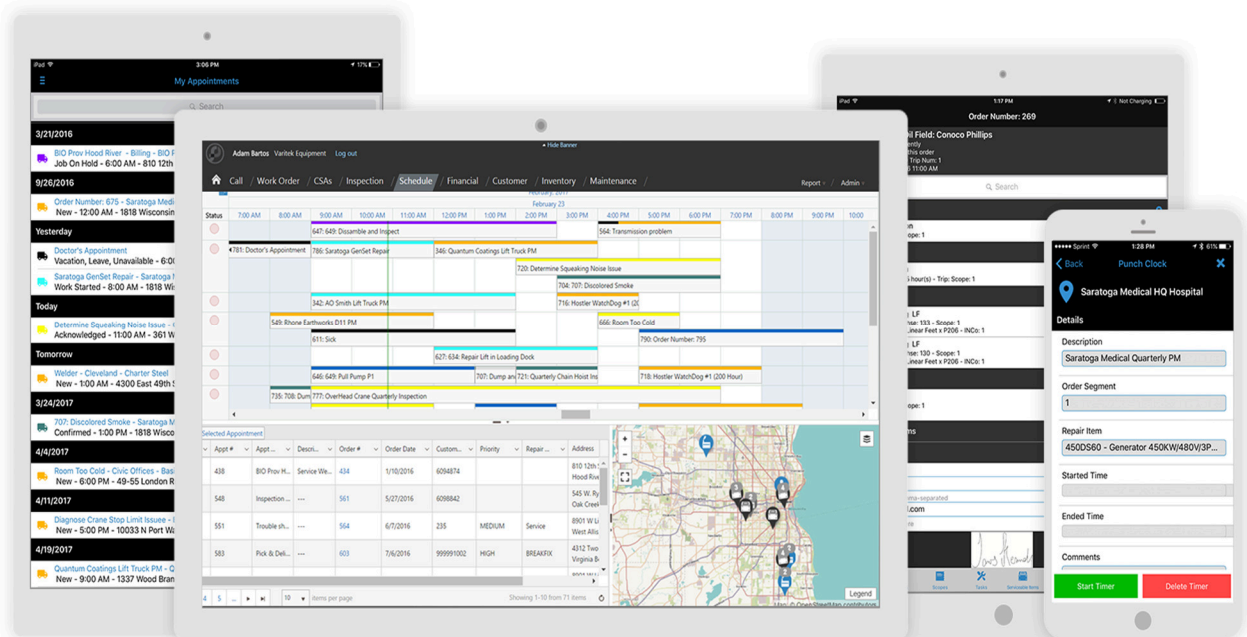
warranties, scheduling, service contracts, and parts. Epicor Service Pro is integrated with Epicor ERP.

Empower your dispatchers and service technicians with the information they need to rapidly respond to customer service needs and be optimally prepared before the site visit. Epicor Service Pro facilitates the rapid flow of critical trouble-shooting data from the customer to the technician—starting with the moment the call comes into the time the technician completes the work, finishes the inspection, and captures the customer signature.

Epicor Service Pro is often used by manufacturers and distributors who service equipment, machinery, infrastructure, or other products at customer sites. With its visual scheduling capability and connected mobile app, a call taker or dispatcher easily finds the closest qualified technician who is available for the work assignment within the ETA window defined by the service level agreement. Additionally, service technicians can see all other scheduled and unscheduled appointments in their region to quickly identify opportunities to minimize travel time—for example, performing a planned maintenance task after completing a nearby repair.

For companies with advanced scheduling needs or large technician teams, Epicor Service Pro Optimize can intelligently advise and automatically schedule work assignments based on the customer's most important criteria.

Mobile Field Service and Inspection App

Improve customer satisfaction, increase field service technician utilization, and boost enterprise service efficiency through a proven cross-platform mobile field service application.

- ▶ Technician Status and Labor Time
- ▶ Mobile Asset Management
- ▶ Warranty and Contract Visibility
- ▶ Spare Parts/Inventory Tracking
- ▶ Task Management

- ▶ Service History
- ▶ Photo and Signature
- ▶ Inspections
- ▶ Segments

Visual Scheduler

Schedule the right worker for the assignment with more speed, accuracy, and less manual effort. Provide dispatch personnel with an all-in-one view of the criteria they need to make accurate scheduling decisions.

- ▶ Automated communication with technician devices
- ▶ Quick and simple drag and drop assignments
- ▶ A single view of service technicians' work status

- ▶ Visual proximity of technicians to customer sites
- ▶ Auto sort by required technician skillset
- ▶ Customize visual scheduler to your business
- ▶ Cloud deployment

Epicor Service Pro Office

Provide your employees with deep service functionality:

- ▶ Enterprise call management and service dispatching
- ▶ Mobile service technician app for iOS and Android devices
- ▶ Task tracking that improves field technician performance and tracks service profitability with tracking for the field and the office
- ▶ Extensive inventory/spare parts tracking capabilities for service management staff and technicians. Work order management handles the entire life cycle of a work order—from calls, quotes, and order dispatching, to technician work order management and invoicing
- ▶ Track all relevant information about your technician team—including skills, work history, and location for efficient scheduling and performance reporting
- ▶ Billing and invoicing generates in a variety of file formats

Contracts and Asset Management

Streamline your service organization with field asset tracking and management capabilities for customer site equipment.

Asset tracking

Detailed tracking and instant visibility of customer site equipment information are critical for today's field service organization. Epicor Service Pro's asset tracking capabilities work in unison with service contracts to provide service organizations with an all-in-one management suite for maximizing customer asset availability and service revenues.

- ▶ Mobile asset tracking with Epicor Service Pro Mobile
- ▶ Asset service and repair history
- ▶ Service contract and warranty visibility
- ▶ Asset component structure hierarchy

- ▶ Mobile asset inspections
- ▶ Automated asset service scheduling
- ▶ Equipment asset transfer tracking
- ▶ Standard asset performance reports

<u>Service Contracts</u>

Comprehensive contract management functionality—from quoting and contract creation, to installment invoicing, then to automated scheduling. Epicor Service Pro's contract capabilities work together with asset tracking to provide service organizations with a complete management suite for maximizing service revenues and improving customer service.

- ▶ Variable coverage of warranty or service contract by each unit
- ▶ Easily add, transfer, or change existing equipment
- ▶ Apply service contracts to all or some of equipment tracked
- ▶ Generate service agreements
- ▶ Automatic renewal notification
- ▶ Installment billing on a variety of intervals
- ▶ Flexible contract coverage periods

<u>Business Intelligence</u>

Drive visibility of critical field service performance information using graphical snapshots. Instantly dive into supporting operational detail with one-click access from dashboards to display the following information:

- ▶ Call center reports and listings
- ▶ Work order reports and listings
- ▶ Service contract reports and listings
- ▶ Inventory reports and listings

Available for on- premises and cloud deployments of Epicor ERP. Additional license and/or subscription is required for this solution. For these details and to inquire about deployment for cloud users, contact your customer account manager

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Production Management

Epicor Advanced MES 8.3

Epicor IoT with Advanced MES

Epicor IoT is an Epicor ERP module that integrates with the Microsoft® Azure IoT Hub and is also available for use with Advanced MES. This application monitors and visualizes data from sensors and PLCs. Epicor IoT leverages Microsoft® Azure IoT as another collection point for in-depth production and maintenance data.

Users can gain intelligent insights into the production and day-to-day enterprise activities, achieving deep levels of operational efficiency. Offering greater visibility for Epicor users within the Epicor ERP MES workstations, users can now visualize Advanced MES readings.

Epicor IoT can monitor data from equipment, assets, environmental factors, and inventory locations. Events, sensor data, and machine telemetry data flow into the IoT hub. From there, the Epicor IoT Administrator can choose which data propagates to the Epicor IoT module. Epicor IoT leverages an advanced rule-based engine to detect patterns and raise alerts and notifications that propagate into ERP where they can be used to trigger

business process changes. For example, when the IoT detects degrading equipment, it raises a maintenance suggestion.

Integration 2.0

The latest release of Advanced MES introduces a modern and flexible integration with Epicor ERP. To improve the efficiency of the data points between Epicor ERP and Advanced MES, it leverages open data protocols and RESTful APIs. ERP remains the system of record for most data. This integration is a modern foundation for growth and to add value through a seamless operation between ERP and Advanced MES (Mattec).

Real-Time Scheduling

New capabilities in Advanced MES Real-Time Scheduling offer greater visibility of the schedule and tooling for master schedulers and production team members to drive more accurate schedules. These features include:

- Display the assigned shifts for each machine
- Remove running jobs from Scheduled and Unscheduled Jobs Lists
- Perform a job change on calendar machines automatically
- Present PM Job Duration in Job Schedule
- New dialog to show assigned shift for machines

Advanced MES Production Real-Time Display (RTD) Enhancements

Find things faster with the new filter for Statistical Quality Control (SQC) samples and the addition of the Down Time Code in addition to the description.

Plant Floor Display (PFD)

In the production scoreboard or Plant Floor Display of Advanced MES (Mattec), the new release adds the ability for greater flexibility in visualizing data with the ability to configure the decimal places displayed.

Machine Interface Units (MIU) Improvements

The MIU is enhanced to support CC100 PLC support, digital input card installation improvements, and additional Euromap63 support features.

Project Management

Epicor Mobile Time and Expense Management Enhancements

Epicor Mobile Time and Expense Management applications are extensions of the Time and Expense Management modules. The apps provide a modern, intuitive user experience that simplifies time and expense reporting and tracking processes.

These applications are compatible with both iOS and Android devices. They can be used with ERP 10.2.400 and later either on cloud or on-premises environments. With ERP 10.2.500, we continue enhancing these applications. New features include:

▶ **Cloud-based storage for attachments:** Both Mobile Time and Expense Management apps now support SaaS multi-tenant attachment functionality. The new document type is created by the Epicor ERP conversion program for SaaS multi-tenant customers. These customers can then attach records to any type of timesheets (daily or weekly) or expense records (indirect or project). When users enter a new record and add an attachment to it, the document type defaults to Mobile Time and Expense. These attachments store on the SaaS server. These secure files can only download through Epicor ERP, regardless of whether they were originally uploaded from the back office or the mobile app.

▶ **Create records in offline mode:** Now for both Mobile Time and Expense Management, if users work in an area with no internet connection, they can still enter expenses or time records into their offline mobile apps. These records save as drafts in the offline storage. When the internet connection is restored, the app automatically synchronizes and submits offline changes to Epicor ERP. If a record created offline fails to synchronize the app shows a Sync Failed alert. When the files complete synchronization, the alert clears. Users can only submit, approve, or reject records after they synchronize. Users can both Edit and Delete offline drafts.

Available for on-premises and cloud deployments of Epicor ERP. Epicor Time and/or Expense Management modules are required. These applications don't require separate licensing, you access them through the Time and or Expense module(s) concurrent licenses.
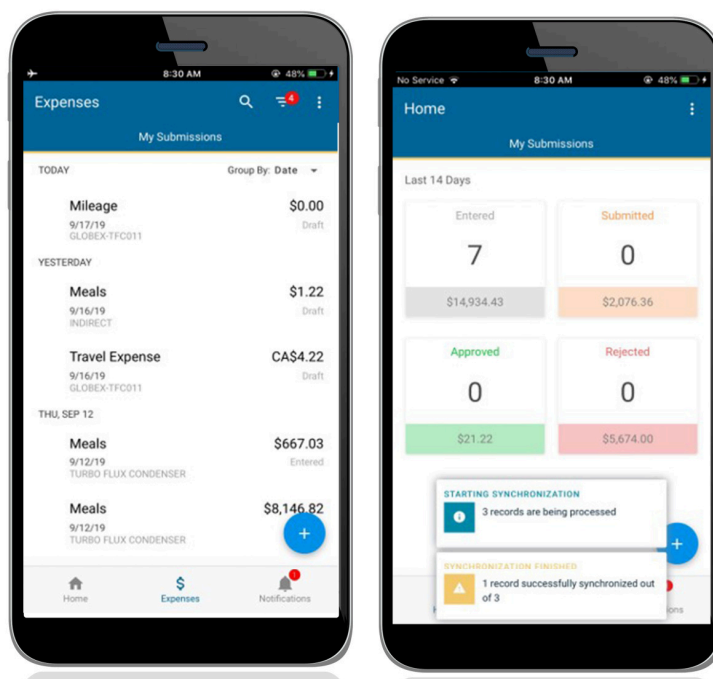
Financial Management

One-time Supplier Bank for EFT Payments

Epicor ERP 10.2.500 offers more flexible support for one-time supplier payments through electronic funds transfer (EFT). Users can now specify the supplier Bank/Branch in AP Payment Entry.

AR Payment Instrument – Signee

This release includes greater clarity and traceability for an AR Payment Instrument signee. For example, users can attach promissory notes to whoever is responsible (the signee) for the note reporting. This feature makes it easier to know who is responsible for the note, insuring more efficient payments.

AR Bank Receipt File Import Express

Automation drives efficiency. In finance, automation generates faster financial reporting for decision-makers. This is especially true for businesses that receive large invoice payments and accumulate thousands of accounts receivable invoices.

A new program, Bank Receipt File Import Express, is a time-saving solution that automatically processes electronic customer payments rather than manually matching imported payments in the Bank File Import program. It's fast. The program is clocked at processing 100 invoices in less than 30 minutes (*actual results may vary*).

Booking Voucher Report to Include Dynamic Segment Elements

Users can use the Target List and Source List fields to specify the list of descriptions for Dynamic Segment elements in the Booking Voucher and Booking Voucher FC reports. The Booking Voucher Report is often used in country-specific functionality (CSF).

Electronic Compliance Engine – AR Electronic Invoicing (e-invoice)

Many businesses around the world are finding new efficiencies in transacting business documents such as invoices electronically. The Electronic Compliance Engine is designed to help businesses stay compliant with current requirements for doing business electronically. To make it even easier to do business in this matter, standard functionality for generating AR electronic invoices (e-invoices) is introduced for use with the Electronic Compliance Engine. With this feature, users can Generate invoices in PDF and/or XML formats automatically and attach them to the invoice in Invoice Entry. They can also, send invoice documents, PDF and/or XML, to the recipients by email automatically and define customized invoice email templates for customers and invoices types or a generic one at the company level.

The e-invoice outputs in various formats including XML or EDI can be defined using Electronic Compliance Engine. In some countries, third-party service providers are used in generating, storing and sending e-invoices in XML format to the recipients. In these cases, the invoice data can be exported as an XML dump file and sent to the third-party service provider by email automatically. They can map the fields in the dump file to the actual fields in the e-invoice format they will use and import the invoice data. Additional development, customization or configuration by the user may be needed if the electronic invoice documents require third-party or government validations, digital signature or seal, which are not covered in this release.

Electronic Compliance Engine Enhancements

This release simplifies managing dynamic reports in the Electronic Compliance Engine through the following features. Both end-users and developers will benefit from this ease of us simplification:

- While creating report data definitions, developers can build BAQ query parameters that easily copy into the definition, reducing the complexity of building dynamic reports.
- Dynamic Date Options such as Today, Tomorrow, Next Friday, End of Month, Start of Current Fiscal Period, and so on are available while selecting the default value for criteria prompts. This simplifies the workflow for setting up Electronic Compliance Engine Report Data Definitions, reducing work for both developers and end-users.

ICE Framework and Tools

Epicor Functions

Cloud customization of standard workflow can be problematic, as many systems limit how much users orchestrate their own unique ERP processes. Because users directly access data in the cloud and their cloud application updates regularly, any modification must have a small impact during application upgrades.

To make upgrades easier for both cloud and on-premises ERP users and improve efficiency for developers, Epicor 10.2.500 releases Epicor Functions. Epicor Functions sit alongside BPMs. When you create functions, you set up your own unique ERP method. Both internal and external sources can then call this function to execute Epicor ERP processes (services). For example, a function can be called internally to look up a phone number or called externally from an outside program that attaches documents to part records.
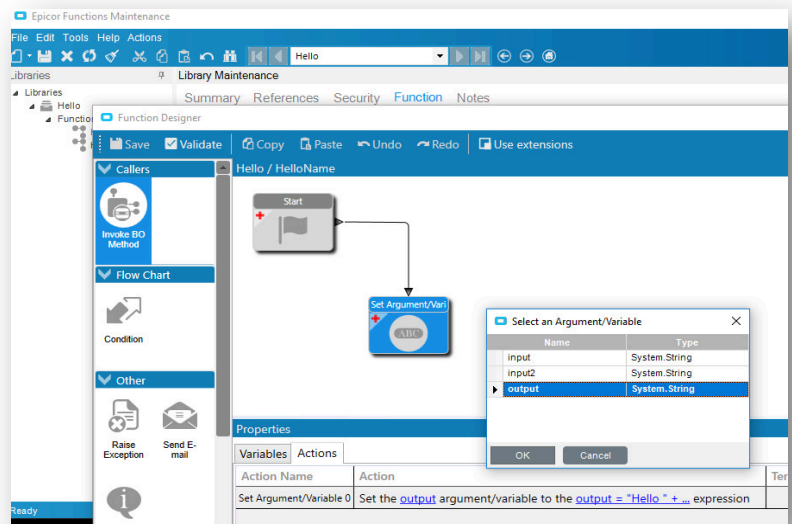
To maximize reusability and efficiency for developers, an Epicor Functions library is built over time to reuse these Functions, eliminating the need to copy and paste this logic to multiple BPM directives.

Additional advanced use cases for leveraging Epicor Functions includes building a standard set of fields that could be fed into the function from an outside system such as an eCommerce site or EDI transaction.

Advanced Print Routing (APR) and Reporting Priority Enhancements

Reduce the effort of managing APR through several easier to use features:

- Include company-related values such as Company Address, Company Phone, Company E-Mail in APR actions. For example, this simplifies adding Company address fields on generated APR output such as e-mail.
- Improve customer, employee, and supplier experience with HTML formatting for APR e-mails. Previously the only format option was text.
- Reduce keystrokes and mistakes when managing DocStar attachments. Now when users are in a DocStar action, the Document Type ID search limits results to only display DocStar Document Types.
- Criteria prompt now displays as Drop-Down list.
- Dynamic Report Criterial Prompts now contain default values.

NEW Tracker: Company Configuration Tracker

When users troubleshoot setup and license issues, businesses need a way to find information about the licensed product and Epicor ERP.

The Company Configuration Tracker offers day-to-day ERP users access to company-wide module setup settings, licensed modules, country-specific functionalities (CSFs), and active users by type. Is a default options setup correctly? How many users are in the system? Did we license the xxx module? Through this tracker, users can answer these common questions themselves.

Improvements to Existing CSFs

Several country-specific functionality (CSFs) packages are improved in 10.2.500:

▶ UK
▶ Argentina
▶ China
▶ India
▶ Finland
▶ France
▶ Mexico

▶ Malaysia
▶ Portugal
▶ Denmark
▶ Germany
▶ Norway
▶ Sweden

For a complete list of updates for these countries, review the Feature Summary.

Third-Party Applications and Integrations

Support continues for several third-party applications and integrations in the manufacturing, distribution, and services sectors. Most third-party applications support global enterprises. During implementation, the Epicor ERP team will work with you to determine which third-party solutions are appropriate for your business needs.

Epicor 10.2.500 supports the following products:

▶ Epicor AgileShip Manifest from Agile Network, LLC
▶ eVision® from TIE Kinetix
▶ Epicor Precise Point of Sale from Precise Business Solutions
▶ Epicor Advanced Requisition Management from Precise Business Solutions
▶ CADink™, ConfigLink, Nest and ECN Manager from QBuild Software Corporation
▶ Epicor Product Life Cycle Management and Product Data Management from PROCAD GmbH & Co. KG
▶ Epicor XL Connect from Biznet Software Inc.
▶ Epicor Cash Collect from e2b Teknologies, Inc.
▶ Epicor Financial Planner (EFP) from DSPanel AB
▶ Epicor EPM Performance Canvas from DSPanel AB
▶ Epicor Knowledge Mentor from SAP SE
▶ Epicor Data Analytics from Phocas Ltd
▶ Microsoft® SSRS from Microsoft Corporation
▶ Epicor Advanced Quality Management from IQS, Inc.
▶ AutoVue® from Oracle Corporation
▶ BarTender® from Seagull Scientific, Inc.
▶ SAP® Crystal Reports® from SAP SE
▶ Epicor Tax Connect from Avalara Inc.

- ► SmartForecasts® and Smart Inventory Planning and Optimization from Smart Software, Inc.
- ► ForecastPRO® for Epicor from Business Forecast Systems, Inc.
- ► XSOL InOrder from XSOL, Ltd.
- ► Workforce Now® from ADP, LLC
- ► Epicor Mobile Warehouse from Biscit, PTY LTD.
- ► Epicor Service Pro from MSI Data.

Compatibility

Epicor 10.2 has been tested on the latest releases from Microsoft—including Windows 10, Microsoft Internet Explorer® 11, Microsoft SQL Server® 2017, and Windows Server 2019. This version supports several browsers—including Mozilla Firefox®, Apple Safari®, and Google Chrome®. Product Development has also provided compatibility guidance for combinations of server and database versions. Epicor ERP 10.2.500 supports these combinations:

- ► Windows Server 2012 R2 with SQL Server 2014, 2016 or 2017
- ► Windows Server 2016 with SQL Server 2016 or 2017
- ► Windows Server 2019 with SQL Server 2016 or 2017

For more information about compatibility, see the Epicor ERP Hardware Sizing Guide on EpicWeb.
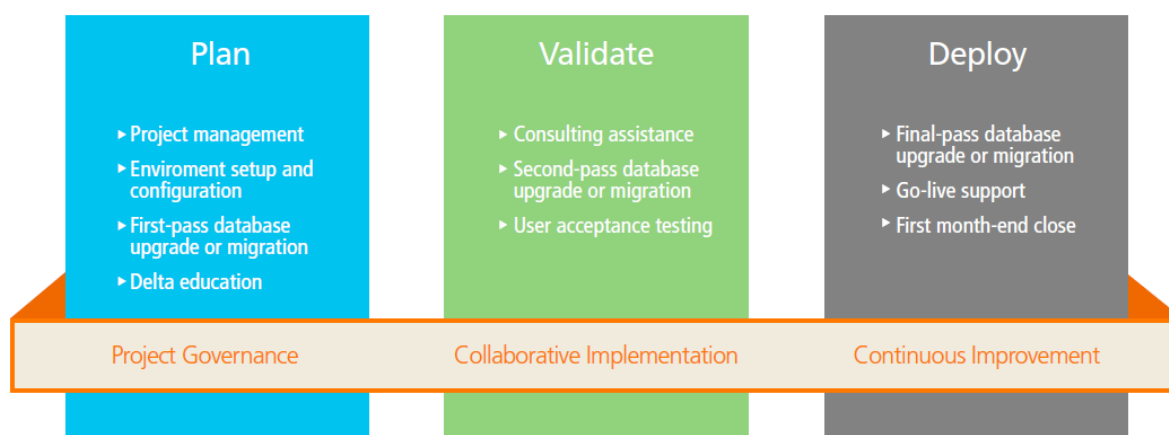
Upgrading to 10.2

At Epicor, we firmly believe all users gain significant benefit by upgrading to new versions of the Epicor ERP software. For users on the Epicor ERP 10 platform, the upgrade process is simplified so you can move between releases without stepping through each one. For example, users can move from 10.1.400 to 10.2 without taking steps to install intermediate releases.

To simplify the upgrade process from Epicor Vantage®, Epicor Vista®, and Epicor ERP 9 to Epicor ERP 10.2, we have invested heavily in new tooling and services dedicated to the upgrade process. Automation and guidance tools help you throughout the entire upgrade process.

Upgrade program

To implement and upgrade your ERP software, the Epicor Signature Methodology is leveraged in every Epicor Professional Services engagement. Decades of successful software implementations and upgrades have refined the program—resulting in minimized risk, cost, and business disruption.

Upgrade Signature Methodology

Plan	Validate	Deploy
‣ Project management ‣ Enviroment setup and configuration ‣ First-pass database upgrade or migration ‣ Delta education	‣ Consulting assistance ‣ Second-pass database upgrade or migration ‣ User acceptance testing	‣ Final-pass database upgrade or migration ‣ Go-live support ‣ First month-end close
Project Governance	Collaborative Implementation	Continuous Improvement

The upgrade process incorporates a methodology for moving to the latest Epicor ERP release. The upgrade program incorporates the elements from the upgrade Signature Methodology to provide the assistance your business may need—including technical consulting, modification services, reporting services, configurator services, EDI Services, Epicor University, and onsite business consulting.

Cloud upgrade tooling and services

To encourage our Vantage, Vista, and Epicor ERP 9 users to upgrade, we have invested in cloud tooling and services dedicated to easing the process. Taking advantage of cloud resources has helped our teams reach new levels of efficiency and collaboration. Below is a matrix of the availability of services.
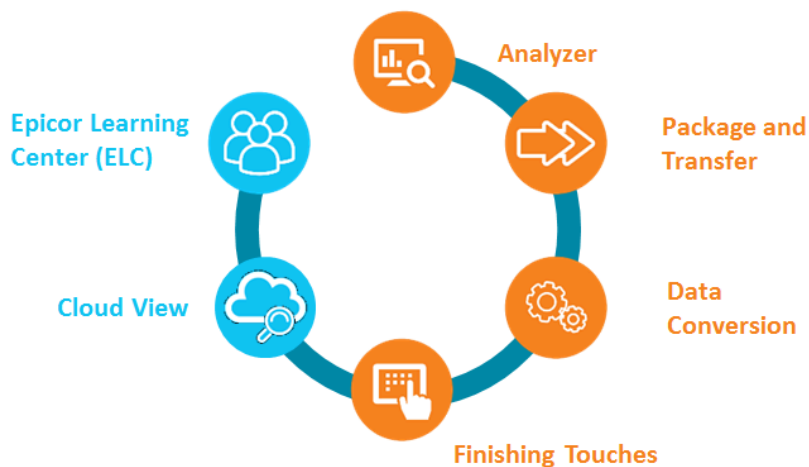
> "It's super simple and you can watch it while it converts. You can see what step it is on and any errors."
>
> Tim Ward, CIO
> Martin Automatic, Inc.

Analyzer

The first step is to assess the volume of your customizations, configurations, and data. To simplify this step, Epicor offers the Analyzer tool. The Analyzer is run against a business' production environment and provides analysis about the system environment, month-to-month data volumes to determine the best cutover time, and system modifications to determine plans for continued use and scope of the update.


Packager/Transfer

Packager/Transfer is a simple-to-use, high-performing solution for packing ERP data and transferring it safely to a secure cloud environment. Data migration runs on this environment.

Data upgrade

A single solution performs analysis and resolves the issues before running the data migration. In the past, separate processes were required that involved user intervention before data was migrated.

Epicor ERP 9 users no longer need to be at a specific release of 9.05. Instead, the data migration automatically upgrades data from any version. For Vantage and Vista users, the upgrade works for any database at version 8.03.305 and later. Earlier versions can upgrade to 8.03.305 regionally or with assistance, then leverage the upgrade tools. This process is fast, as Epicor leverages cloud resources. A portal shows the converting data at each step of the process. For optimal use, the standard conversion package offers three passes of the conversion.
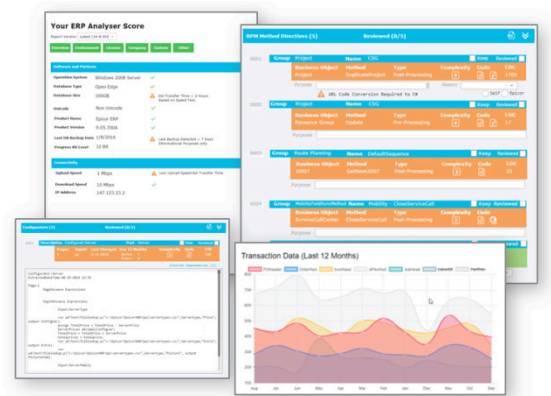
Reconciliation Reporting

After upgrading data, one challenge is to validate the converted data. In the past, users ran thirteen reports before updating their data, rerun them in the new environment, and compared results. This was both time-consuming and risky, as missing details caused much frustration. Epicor addressed this frustration by providing reconciliation analysis that does the work for you—even pointing out data causing the problem. These reports include:

- ▶ AP Aging
- ▶ General Ledger—Opening Balance
- ▶ AR Aging
- ▶ General Ledger—Debit
- ▶ Check Register
- ▶ AP Received Not Invoiced
- ▶ GL Trial Balance
- ▶ General Ledger—Credit
- ▶ Open Purchase Orders
- ▶ Material Transactions
- ▶ Quote Detail
- ▶ Sales Order Backlog
- ▶ Scheduled Shipments
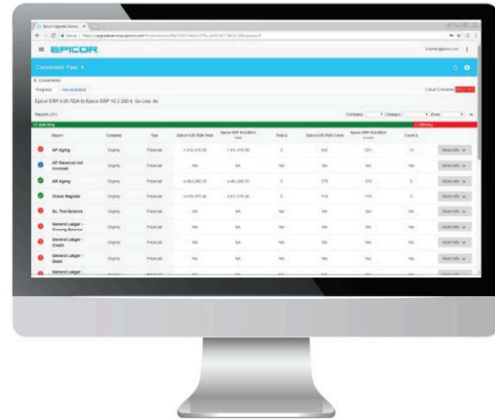
At this time, Reconciliation Reporting is only available for Epicor ERP 9.05 users upgrading to the latest release of Epicor ERP.

Cloud View

Once data converts, Epicor offers a secure cloud environment where users can view their data in an Epicor ERP 10.2 environment. This immediately follows data conversion and offers users the ability to test their data in the new environment, start user training and systems testing, and upgrade customizations and configurations. You can also use a tool Epicor ERP, the Solution Manager, to save entire solutions and export and import them between releases. This tool helps ensure a smooth upgrade process.

Epicor Learning Center Upgrade Essentials courses

Epicor University offers 75+ Upgrade Essentials courses designed to train users on the functionality in the new release. These courses are available to all users on maintenance and support—regardless of whether you have purchased Embedded Education.

Cloud upgrade tooling and services availability

Release	Analyzer	Packager/ Transfer	Data Conversion	Finishing Touches Services	Cloud View	Epicor Learning Center
Vantage/Vista 6.1	Available at 8.03.403C	Available at 8.03.403C	Extra help needed to get to 8.03.403C	Available	Available	Available
Vantage/Vista 8.03.403C	Available	Available	Available	Available	Available	Available
Epicor ERP 9	Available	Available	Available	Available	Available	Available
Epicor ERP 10.0	Available	Available	Available	Available	Available	Available
Epicor ERP 10.1	Available	Available	Available	Available	Available	Available
Epicor ERP 10.2	Available	N/A	Check with your CAM*	Available	N/A	Available

*Customer Account Manager

Epicor Support

Epicor stands behind all its products with an award-winning support organization capable of serving our global user base efficiently and effectively. With more than 45 years of experience supporting users, Epicor Support has a proven history in user satisfaction and increasing the value that they derive from our software. More than 600 support analysts with deep industry expertise have an average of six years of experience. These Epicor employees serve as customer advocates and are responsible for seeing cases from submission to resolution in 30 languages across our 12 global support centers through the EpicCare support portal.

Epicor Support provides comprehensive application and technical support, which includes Epicor and specified third-party software, databases, and technology.

Application Support (for certified Epicor applications):

▶ Resolve product and user issues, inconsistencies, or errors on certified and supported configurations
▶ Offer guidance on certified system workflow and processes
▶ Provide product documents and tools that help end-users on certified and supported configurations
▶ Build and share a knowledge library to allow customers to self-serve
▶ Liaison to Epicor Product Development on behalf of customers

Technical Support (for certified Epicor system, database and supporting technology and tools):

▶ Diagnose, isolate and report software issues on certified and supported configurations
▶ Assist IT staff in resolving application and technical system issues on certified and supported configurations
▶ Assist customers with optimizing the performance of their certified software and systems
▶ Assist with the supported upgrade and migration tools
▶ Build and share a knowledge library to allow customers to self-serve
▶ Liaison with Epicor Product Development and third-party vendors on behalf of customers

Hours of Availability

Epicor Support understands that your business and support needs are not always within business hours and our tenured support analysts are available to help with cases based on your support plan. Essential Support on-premises customers receive coverage during Epicor Support defined local business hours; Pro Support with on-premises deployments receive 24x7 coverage for priority 1 and 24x5 coverage for priority 2 cases (English outside of local business hours).

Epicor cloud customers have 24x7 coverage for priority 1 cases. Pro Support cloud customers receive additional around the clock coverage for priority 2 cases as well.

All other priority case levels are addressed during local business hours.

Advanced Support Tools

Epicor Support utilizes leading-edge technology and tools to enable you to easily connect with the right person and the right knowledge to quickly resolve issues. Our automatic call distribution system is designed to route calls to the appropriate support analyst. Via EpicCare—the Epicor holistic service platform—our analysts have instant access to your records and an extensive knowledge base of information. Using industry-leading tools, our analysts can often remotely access and diagnose issues in real-time.

Online Support Center

EpicCare allows you to get more from your Epicor ERP 10.2 solution. It gives you one place to get the help you need—providing you 24/7 access to information, resources and services, account information, incident tracking, our support Knowledge Base, videos, product documentation and downloads, online forums and communities, and other helpful information.

Product Updates

Customers on active releases have access to fixes, enhancements, and upgrades. The periodically released product updates typically contain recognized issues identified through customer feedback, requested new or enhanced features/functionalities, government regulatory requirements, or architectural/performance improvements.

New Support Offering: Essential and Pro Support

In our continuing global and cloud expansion efforts, Epicor has introduced new global support offerings for ERP. These offerings are designed to ensure we have a consistent, industry-leading approach to meeting our global customers' support needs, regardless of the deployment model. Building on the strength of our industry expertise, Epicor is focused on providing a transparent, empowered and highly responsive set of services that enable our customers to experience the optimum self-service/assisted service model. Existing Support and Maintenance customers will be grandfathered into the new plans and benefits.

All support customers receive Epicor Essential Support. For customers looking for increased responsiveness, Epicor Pro Support may be the right option.

With Epicor Essential Support all customers can access:

- Deep industry expertise supporting Epicor software and related technologies
- The award-winning EpicCare support portal
- Flexible support for cloud, on-premises, or hybrid solutions
- 100% Epicor employee support analysts
- Industry-leading response times for priority 1 cases

- Technology and feature advancements through upgrades or migrations to new Epicor platforms

In addition to the benefits listed above, Epicor Pro Support customers will receive:

- The comfort of availability through 24x7 support and global support center access
- Exceptional levels of case prioritization and resolution where third-party escalation is kept to a minimum
- Peace of mind with senior support experts to handle support cases and incidents
- Advocacy through scheduled support manager meetings
- Deeper insights with the Support Experience Dashboard

For more information about Epicor Essential and Pro Support, we courage you to look at the available resources:

- Watch a recording of the customer webcast for an overview of the different support options and how it impacts your ERP solution
- Statement of services in EpicCare
- Support Experience Dashboard video guide in EpicCare
- Support Experience Dashboard reference guide in EpicCare

New Support Offering: ECC 24X7 Support

For customers using Epicor Commerce Connect (ECC) in a cloud or hosted environment, Epicor Support now has a service that addresses the critical need for continued availability and operation of ECC online sales. For an additional fee, 24x7 Support for ECC enables customers to get support regardless of the time of day to ensure business continuity. To learn more about this service, please review the ECC 24x7 Support statement of services or complete a Service Plan Request Form.

New Support Offering: Extended Support

Extended Support is available, for an additional fee, for some Epicor ERP releases. Extended Support increases customer access to key support elements while completing upgrades to an Active Release. The service includes:

- One year of Extended Support – starting from the first day the product release (Extended Support Release) moves to Sustaining Support, continuing for a period of 12 months (currently there is no renewal available). The Extended Support plan expiration date is independent of the customer's Epicor support and maintenance plan)
- Severity 1 and Severity 2 bug fixes for the Extended Support Release
- Telephone support during standard support hours
- Ability to purchase addon functionality. Previously purchasing addon functionality was only available to customers on an active release. Now Extended Support customers are eligible to purchase add on functionality.

If you are interested in more information on Extended Support please review the statement of services or complete a Service Plan Request Form.

Software Support Lifecycle

Epicor is committed to being your longtime ERP technology partner and delivering innovative tools to your business on a regular basis. To promote a focus on new technologies, Epicor has developed a software support lifecycle policy to communicate our development and support plans so that businesses can establish an ongoing plan to stay current. See the Epicor ERP Software Support Lifecycle Policy on EpicWeb for more information.

Below is an update by the release on support stage along with transition details:

Product Release	Release Date	Support Stage	End/Transition Date
Epicor ERP 10.2.500	October 17, 2019	Active	Move to Sustaining October 17, 2021
Epicor ERP 10.2.400	May 16, 2019	Active	Move to Sustaining May 16, 2021
Epicor ERP 10.2.300	October 17, 2018	Active	Move to Sustaining October 17, 2020
Epicor ERP 10.2.200	April 19, 2018	Active	Move to Sustaining April 19, 2020
Epicor ERP 10.2.100	December 6, 2017	Active	Move to Sustaining December 6, 2019
Epicor ERP 10.1.600	May 15, 2017	Sustaining	Currently in Sustaining
Epicor ERP 10.1.500	November 8, 2016	Sustaining	Currently in Sustaining
Epicor ERP 10.1.400	December 17, 2015	Sustaining	Currently in Sustaining
Epicor ERP 10.0.700 and earlier	August 4, 2014	Sustaining	Currently in Sustaining
Epicor 9.05.702 and earlier	June 12, 2013	Sustaining	Currently in Sustaining
Vantage/Vista 8.03.400 and earlier	July 9, 2012	Sustaining	Currently in Sustaining

User Groups

Epicor has formal user groups with industry-focused regional and international subgroups who meet regularly. These groups provide an opportunity to network with peers and gain from their knowledge and experiences with Epicor software. User groups are a critical link between Epicor and our user community—providing a format for users to engage with Epicor in an open, collaborative environment. They help Epicor plan future product releases. Visit the Epicor Users Group at www.epicorusers.org.

Epicor University

Epicor University provides learning tools, content, and training opportunities that enable you to achieve your business goals. The suite of tools available offers comprehensive training options that align with the different learning styles and needs of your employees. The below graphic represents content that is new for our 10.2.500 release across our learning resources:

- ▶ Epicor Learning Center (ELC)
- ▶ Training on Demand video-based courses
- ▶ Knowledge on Demand quick answer videos
- ▶ Embedded Education self-paced courses
- ▶ Role-based training agendas
- ▶ Course tests
- ▶ Online help
- ▶ Release documentation
- ▶ Live training

What's New for Epicor ERP 10.2.500?

Cloud

- ▶ Getting Started with Epicor ERP in the Cloud •
- ▶ Epicor Support and Cloud Operational Excellence •
- ▶ Upgrading Custom Items in Cloud Environments •
- ▶ Cloud Guide (Update) •

Financial

- ▶ What's New in Epicor ERP 10.2.500 •
- ▶ Epicor Delta Financials 10.2.500 •
- ▶ Tracking Cash Receipts •
- ▶ Understanding GL Control Codes (Update) •
- ▶ Accounts Receivable (Update) •
- ▶ Cash Management (Update) •

Delta Manufacturing and Supply Chain Managment

- ▶ What's New in Epicor ERP 10.2.500 •
- ▶ Epicor Delta Manfacturing/SCM 10.2.500 •
- ▶ Getting Started with Payroll Employee Maintenance •
- ▶ Entering Deductions and Payroll Taxes in Payroll Employee Maintenance •
- ▶ Defining Bin Sizes and Bin Attributes •
- ▶ Using the Bin Setup Wizard to Generate Bins Automatically •
- ▶ Entering an Employee in Employee Maintenance •
- ▶ Printing Labels and Tags for Receipts (Update) •
- ▶ Adding Landed Costs in Receipt Entry (Update) •
- ▶ Using Serial Numbers in Epicor ERP •
- ▶ Adding Quotes, Jobs, and Other Records in Project Entry •
- ▶ Reviewing Costs in Project Entry •
- ▶ Entering a Make-To-Order Quote •
- ▶ Tips and Tricks for Quotes with Sammy Sellsalot •
- ▶ Creating a Marketing Campaign Using Customer Relationship Management •
- ▶ Entering an Engineer-to-Order Quote •
- ▶ Using Available to Promise •
- ▶ Using the Order Job Wizard •
- ▶ Processing a Counter Order •
- ▶ Creating a Sales Order •
- ▶ Processing a Customer Return •
- ▶ Setting Up Service Pro •
- ▶ Mattec Integration Guide (Update) •
- ▶ Service Pro Integration Guide •
- ▶ Advanced Configurator •
- ▶ Setting Up Projects •
- ▶ Project Costing •

Tools

- ▶ What's New in Epicor ERP 10.2.500 •
- ▶ Epicor Delta Tools 10.2.500 •
- ▶ Exporting, Importing, and Deleting Personalizations •
- ▶ Using Field Help and the Data Dictionary •
- ▶ Using Predictive Search to Return Targeted Results •
- ▶ Displaying Related Information through BAQ Zones •
- ▶ Using Routing Rules to Send Preview Email •
- ▶ Using Mobile Dashboards (Update) •
- ▶ Getting to Know Business Process Management •
- ▶ Extending Your Business Processes Through Epicor Functions •
- ▶ Migrating BPM Directives to Current Version and Code •
- ▶ Understanding the Business Process Management Workflow Designer (Update) •
- ▶ Creating Alerts Using Method Directives (Update) •
- ▶ Epicor Data Discovery (Update) •
- ▶ Advanced BPM (Update) •
- ▶ System Administration—On Premise (Update) •

• Training on Demand • Embedded Education
• Documents and Release Guides • Instructor Led

Epicor Learning Center	https://erpcustomer.epicor.com
Embedded Education	In Epicor ERP (License available from your customer account manager)
Knowledge on Demand	https://bcove.video/2KjvWfQ
Documentation	EpicWeb > Documentation

New education courses available

In addition to the courses developed and updated to support 10.2.500, Epicor University has introduced three new courses.

▶ **Setting Up Projects Course** - In this course, you will learn how to set up a project and define its details. You will split the project into goals and objectives (WBS Phases) and create milestones to monitor the project's time frame. You will also establish billing.

▶ **Project Costing Course** - This course provides a foundation for using project cost control in Epicor ERP. Using this course, you will oversee a specific project with multiple WBS phases and learn how to control and review project costs.

▶ **Advanced Configurator Course** - This course demonstrates how to integrate a configuration process to collect data and execute rules for configure-to-order items based on customer input or selections. It also focuses on how to set up the universal method and rules base and execute these rules to achieve unique product designs. The course uses a series of workshops centered on utilizing the configurator for a complete line of submarine sandwich options.

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.

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