Epicor ERP 10.2.100 Release Guide

User Briefing Paper

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Introduction

According to IDC, a leading analyst firm, by 2018 only 30 percent of manufacturers investing in digital transformation will be able to maximize the outcome. The rest are held back by outdated business models and technology. IDC also estimates that less than 10 percent of data is used effectively, partly because manufacturers often have limited access to data when they need it. (IDC, "Moving Forward with Digital Transformation in the Manufacturing Industry," May 2017)

In contrast to these facts, a 2016 CEO survey by Gartner, another leading analyst organization, suggests that 50 percent of CEOs say their businesses will be digitally transformed by the year 2020. (Gartner Research, "Technology Providers Need to Reshape Their Business to Capitalize on Digital Business Opportunities," by Julian Poulter, July 21, 2016)

Epicor enables manufacturers to grow, innovate, and compete in today's ever-changing global landscape. Businesses that adopt the latest technologies in cloud, analytics, and employee experience will be fit to enable their organizations to grow and support the new digital challenges of tomorrow and provide a competitive advantage for years to come.

Epicor ERP 10.2 offers a critical advantage to users to meet these challenges with ease and is based on six key themes.

1. **Cloud-first strategy**: Extending our use of cloud-based applications for both cloud and on-premises users continues with 10.2. In particular, new modules like Epicor Field Service Automation, Epicor Payment Gateway, and Smart Inventory Planning and Optimization are built as cloud-first applications. For Epicor Cloud ERP operations, new tooling enhancements are being introduced that are designed to improve updateability to improve upgrade processes.

2. **Globalization and localization**: Epicor continues to focus on the changing global landscape and is ready to support global opportunities for your business. Compliance with new regulatory requirements and enhanced features focus on maintaining our geographic footprint in the USA, Mexico, Peru, China, Malaysia, Taiwan, Thailand, Vietnam, and India. Key major features include completion of legal numbering and non-recoverable taxes. Epicor ERP also introduced new tooling to make it easier and simpler to add country-specific functionality (CSF). Finally, the addition of Company Time Zone reduces complexity for distributed environments.

3. **Experiences**: Epicor Active Home page offers a new experience for users.. The home page becomes a dashboard providing key analytics and quick access to functionality. Also, 10.2 expands access for users while out of the office with Mobile CRM and Field Service Automation (FSA) field users.

4. **Analytics**: We're introducing Epicor Data Discovery (EDD), which provides a newer class of business intelligence (BI) applications centered around rich on-demand data exploration rather than rigid data warehousing and reporting with core capabilities embedded in new home page.

5. **Ecosystem**: Epicor continues to develop Epicor ERP to enable our rich ecosystem of partners to build industry-leading technology in support of our customers' business needs. As these technologies evolve, development continues to make it easier to not only build and deploy these robust features but also to upgrade them. Solution Manager has been enhanced with some new features for all users as a result of these efforts.

> *"By 2020, 70% of organizations will cite customer satisfaction as a primary benefit derived from implementing field service management, up from approximately 50% today."*
>
> *Gartner Magic Quadrant for Field Service Management, September27, 2017*

6. **Deep industry focus**: New and enhanced capabilities will be introduced, including Epicor FSA, Epicor Payment Gateway, CRM/SFDC integration Phase II, Package Control 2D barcodes and Menu and Handheld enhancements, and improvements to the Mattec MES-ERP Integration. There will also be a new release of Mattec MES that supports CNC processes.

Epicor ERP 10.2 is primed to help business solve the complex challenges of your industry and position your business to grow profitably now and in the future. It contains proven solutions and processes that fit your unique business requirements. Committed to providing positive experiences for our customers, Epicor provides ease of everything—deployment, education, support, upgrades and maintenance—that results in greater profitability, productivity, and growth.

General

Active Home page

Epicor ERP 10.2 offers a new visual experience for users with the option to opt-in to a new Active Home page at login.
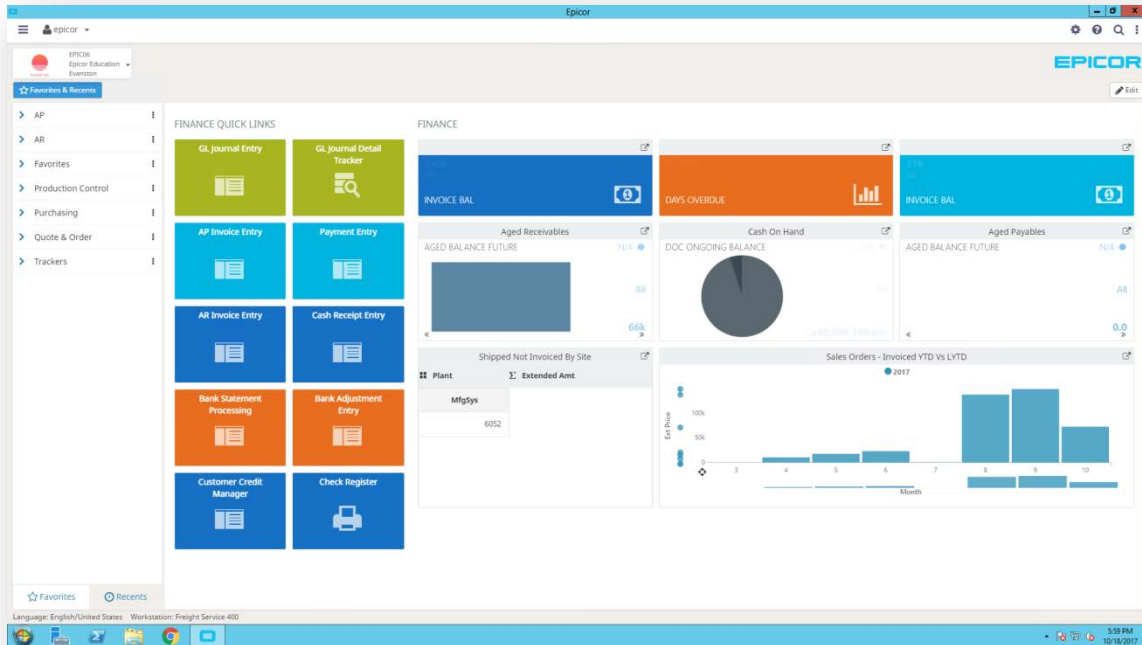
The home page in Epicor ERP now offers an overview of key aspects of your business' performance. Here are a few highlights:

▶ Users can add customizable and interactive widgets to display charts, graphs, and KPIs populated via Business Activity Queries (BAQ). When users attach a BAQ to the home page, they can select to periodically refresh the BAQ results to make sure they're working with the latest database output.

▶ Users can attach an Epicor Data Discovery (EDD) view as a a tile to display animated real-time data with simple and streamlined controls.

▶ If you want to dig deeper into business data, just hover on any data point for more details or drill into the relevant metric with the provided link on each card.

▶ The home page layout offers new role-based layouts that can be adopted easily by users , based on role in the company. There are three predefined role-based layouts—financial, manufacturing, and supply chain. Each has suitable Favorites and EDD tiles.

- ▶ You can select a company and site logo image.
- ▶ Users can add, remove, and modify tiles to create a home page layout that streamlines use of the Epicor ERP application. They can also save home page layouts for use as the default home page for specific companies and users. Leverage these features to create a home page that works best for you.

Epicor Data Discovery (EDD)

Built to extend the existing Epicor dashboard capabilities, Epicor Data Discovery is part of the Epicor data platform that enables Epicor ERP users to access greater visualization and self-discovery tools for their existing and growing library of dashboards and BAQs. EDD is an analytics solution intended to provide an easy-to-use data exploration and data visualization experience. EDD is a major component of the overall Epicor data platform, which encompasses a broad set of capabilities for managing, accessing, sharing, cleansing, visualizing, and extracting insights from data created by or related to Epicor-created data.

Business focus

Fully embedded within the new Epicor Active home page, EDD offers the enterprise-wide visualization needed to drive new levels of focus in business roles—customer, product, production, finance, and other areas. Whatever the business wants stakeholders to focus on when they log in to the ERP system will be front and center. To get started right away, Epicor ERP comes with a set of standard metrics for finance, manufacturing, and supply chain users.

Anywhere access and responsive design

EDD is accessible via SmartClient, web browsers, tablets, and modern smartphones. The application is designed to work as well on low-powered touch devices as it does on a powerful desktop with large screen real estate. The application supports responsive design concepts and automatically adjusts its layout and behavior to the browser and device accessing it. Views are resizable and embeddable on the home page as animated tiles.

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Self-serving data that's easy to use

With little or no training required, you can monitor the status of complex business processes by graphically displaying performance in a Data Discovery View. Simply drag and drop new pieces of data on Views to analyze them further by drilling into details. Data Discovery Views can use the huge amount of business data providing valuable insights into your business, and it's easily accessible with little to no IT involvement thanks to the data extraction process used by EDD. It allows you to use predefined sets of data that are organized and summarized by a set of dimensions and measures.

Data visualization types

The following data visualization types are available in Epicor Data Discovery: grouped, stacked, and % stacked bar, line, bubble, scatter, dotplot, pie, and pivot table.

Legal numbering standardization

Legal numbers provide a new alternative way to uniquely identify a transaction. These identifiers are required by some countries and have controls to prevent gaps in sequence and provide an additional tracking method. Legal numbering is available in Finance, Order Management, Inventory Management, Shipping Management, Production Management, and Handheld.

The latest release of Epicor ERP provides a standard set of functionality surrounding legal number capabilities that includes Legal Number Report and History Reporting, Voided Legal Number Reporting, Legal Numbering Change Logs, Legal Number Formatting and pre-numbered formats. Legal Numbers also support user specific prefixes and numbering sequences.

It is likely that the US will eventually adopt global system audit standards, including SAF, for audit reporting and thus use of legal numbers will become necessary for audit traceability. US may use a different SAF structure/format/technology. The good news is that with Legal Numbers we have the framework in place today for future transaction auditing.

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Sales and Marketing Management

Epicor Mobile CRM

Keeping your customers at the focus of your business today means that you need to be able to respond to their requests in a fast and efficient way. It is crucial to take advantage of the latest technologies by providing your salesforce with easy-to-use tools that increase productivity and improve employee engagement.

Epicor Mobile CRM empowers your salesforce by providing mobile access to the entire CRM suite of capabilities on any iOS™ or Android™ device. You can manage the sales cycle from lead to quote—anytime, anywhere.

Through our next-generation mobile application, you can manage leads, customers, and contacts, as well as quotes from opportunity to order. Create activity-based workflows like call and email logging, notes, "to do" lists and appointments, and implement your back-office task workflow. Access data related to competitors, cases, projects, and order history. In addition, you can access back-office dashboards and forms as needed to complete more complex tasks.

Epicor Mobile CRM is an integral part of your Epicor ERP solution, and can be utilized at no additional cost beyond your back-office user license or CRM user license. It supports different language and international formats, including English and Spanish.

Salesforce integration improvements

To expand integration points between the two applications and provide greater flexibility when synchronizing CRM data, we implemented the following features:

- ▶ Bi-directional quote synchronization between Epicor ERP and Salesforce.com including options for net change and regenerative
- ▶ When you synchronize part data between Epicor ERP and Salesforce.com, the ERP on-hand quantity for each synchronized part is sent to Salesforce.com
- ▶ Support for sales kits when importing quotes from Salesforce.com
- ▶ A synchronization process that can include all customer/contact, part, and quote records set to synchronize
- ▶ Review tasks and task logs for Salesforce synchronization processes initiated through Salesforce Synchronization

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Epicor® Payment Exchange™

Epicor can also be your business partner in payment processing. There are many payment processers to choose from, but with Epicor Payment Exchange, you can work with one that understands the challenges of your business and is one of the fastest-growing payment processors in the U.S. (2016).

Other processors may:

- ▶ Provide confusing monthly statements that seem to change in format every month
- ▶ Give you security and compliance concerns
- ▶ Surprise you with new fees that arrive all too frequently
- ▶ Not treat you as an important customer unless you're a sprawling big box retailer

We understand the strain of running your business and dealing with cash flow, employees, scheduling, selling, and marketing. 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.

Simplify and save with Epicor Payment Exchange

The Epicor Payment Exchange service handles all the key steps in accepting card payments—real-time authorization, next-day settlement, and comprehensive reporting. Because it's fully integrated with Epicor ERP, just about every step can be quicker and easier. Some tedious steps, such as double entry of payment information and daily batch reconciliation, simply disappear. Leveraging technology and relationships that serve thousands of merchants, Epicor Payment Direct brings you volume discounts that many processors simply don't offer, leaving more of every sale where it should be—in your bottom line.

Savings are only part of the story. The Epicor Payment Exchange service also brings superior technology that is designed for higher security, easier compliance, better service to customers, and streamlined processes in your back office.

Imagine viewing a recent transaction in your own web-based dashboard without waiting for a monthly statement. You can accept a credit card payment remotely on your own virtual terminal from any Internet-connected browser. Those are standard with the Epicor Payment Exchange service. Beyond that convenience, your monthly costs will be lower and you can count on support from a trusted partner. Epicor in-house experts have the knowledge and tools to solve problems quickly should they occur.

Lower costs and fewer surprises

- ▶ Receive low rates regardless of size, industry, or number of card-based transactions
- ▶ Get straightforward, predictable pricing with statements and reports free of surprising new fees and surcharges
- ▶ Access transactions at any time to verify volumes and predict monthly charges

Simplified processes and more convenience

- ▶ Get complete authorization, settlement, and reporting tools—all from the technology provider you already know and trust

- ▶ Avoid redundant data entry and end-of-day batch reconciliation—everything happens automatically, right within the ERP 10.2 system
- ▶ Process credit card transactions from any computer with an Internet connection via Virtual Terminal

Highly secured data and enhanced compliance

- ▶ Protect your business and your customers with cardholder data encryption
- ▶ Ensure the highest possible level of security through fully integrated technologies
- ▶ Remain compliant with card industry security requirements, including PCI DSS

Comprehensive web-based reporting plus anywhere, anytime access

- ▶ Online access to view up to 13 months of daily batch details and ability to drill down to transaction-level detail
- ▶ Back office processes are smoother by reconciling transactions against daily deposits whenever and wherever it's convenient

The Epicor Payment Exchange subscription requires the Epicor Credit Card Processing license. This subscription replaces your existing PayPal subscription.

Configurator Input value purge

To reduce database size, users can periodically purge Configurator Input values older than 3 or 18 months, depending on purge options selected. A new process, Database Purge and Summarize, enables this capability.

Production Management

Mattec MES 8.2.3

The Epicor Mattec® Manufacturing Execution System (MES) extends your Epicor ERP system to provide automatic production monitoring and process monitoring. Mattec MES empowers manufacturers with production data and the ability to eliminate inaccurate and time-consuming manual data collection so operators can stop measuring and monitoring and instead focus on making quality products.

If you're ready to become more competitive with lean manufacturing and Six Sigma initiatives, advanced MES delivers the data, analysis, and root-cause information automatically. You can achieve informed lights-out manufacturing, and get the powerful metrics you need to improve performance—overall equipment effectiveness (OEE), run rates, scrap, yield, energy consumption, material consumption, and much more. Accurate machine-related data, along with operator depth and dimension, helps you pinpoint critical issues, reduce waste, and improve quality and customer service.

New release Mattec MES 8.2.3 now available with Epicor ERP 10.2 and earlier includes support for long cycle time support through OPC, which is of particular interest to anyone with machinery like CNC machines that have a long amount of time between cycles. Mattec MES is a separate license.

Enhanced Mattec MES integration

In addition to supporting the new release, Epicor ERP 10.2 offers new integration points designed to improve the efficiency and ease-of-use for Mattec MES with Epicor ERP software. The new integration points include:

- ▶ The Epicor ERP user interface has been updated to include the Pieces per Cycle operation standards used in Mattec MES.
- ▶ Epicor ERP now offers support for machine parameters that can be used by production planners to keep track of machine parameters in both Epicor ERP and Mattec. This offers a single point of engineering definition that resides in Epicor ERP. Some examples include:
  - o Injection pressures
  - o Opening/closing speeds
  - o Barrel/mold temperatures
  - o Multiple locations/zones
- ▶ Users can now export net changes only to Mattec.
- ▶ Users can now clear the Mattec schedule from Epicor ERP.
- ▶ Support for Resource Groups in the process sheet simplifies part engineering for users.
- ▶ To better control information going to Mattec, users can now limit the number of operations exported to Mattec.

![Epicor logo]

MES License Changes

Some options in MES have had their license requirements modified depending on whether AMM is a licensed module in the installation.

Requires AMM License

▶ Production: Get Request

Does not require AMM License

- ▶ UOM Split/Merge
- ▶ Mfg Receipts
- ▶ Serial Tracker
- ▶ Issue Material
- ▶ Issue Assembly
- ▶ Issue Misc
- ▶ Mass Issue
- ▶ Return Material
- ▶ Return Assembly
- ▶ Return Misc
- ▶ Tran Log
- ▶ Where Used
- ▶ Move Inventory
- ▶ Adjust Inventory

Epicor PLM integration improvement

You want the PLM server process to send back the last revision information so the data is the same in ProCad and Epicor ERP, regardless of the Effective Date and the Approved revision status. New functionality causes the PLM server process to search for the last modified revision regardless of whether it is approved or not.

Material Management

Warranty adjustments at shipment

Greater flexibility in shipment entry enables users to adjust the warranty information such as warranty code, effective date, warranty coverage, and warranty type on line items at the time of shipment. In particular, users who leverage "part on the fly" capabilities (where the product being shipped isn't held within the part master) are able to manage warranty date. Setting effective date is a particular ask by users.

Drop shipment invoicing when complete

Many businesses want to preserve invoicing drop shipments until all order lines have been shipped complete. The check box "Invoice When Complete" located on the order now works with drop shipments.

Epicor Smart Inventory Planning and Optimization platform

Streamline your supply chain operation

While improving forecasting is a key process for your company, it is just the beginning. Doing business today requires a holistic approach to inventory management. The real value relies on using the forecast to drive inventory strategies.

Epicor Smart Inventory Planning and Optimization platform is an integrated set of cloud-based applications for demand planning, inventory optimization, and supply-chain analytics that drives sales and inventory operations planning (SIOP).

It offers a convergence of robust forecasting methodologies, optimization techniques, and consensus demand and inventory planning delivered via an easy-to-use interface accessible through any web browser.

Flexible and scalable

With the Epicor Smart Inventory Planning and Optimization platform, you can address a discrete set of supply-chain issues including demand planning, forecasting, inventory optimization, or inventory reporting initially with the opportunity to expand as your requirements grow.

Epicor Smart Inventory Planning and Optimization integrates with Epicor ERP using an "out of the box" connector that simplifies module implementation and support. Each platform module operates under the same common data model, meaning that when you implement one module, you are implementing for all. No new data acquisition effort is required enabling you to seamlessly add new planning technology as your requirements grow.

Smart Demand Planner

Epicor Smart Demand Planner provides cloud-based statistical forecasting that automatically selects the right forecast model for each item accounting for trend, seasonality, and promotion/event-driven demand. Once the baseline forecast is produced, it is available for collaborative review and consensus planning by authorized stakeholders. Forecast accuracy can be measured to ensure the best possible forecast is delivered to the business at both the aggregate and item-mix levels.
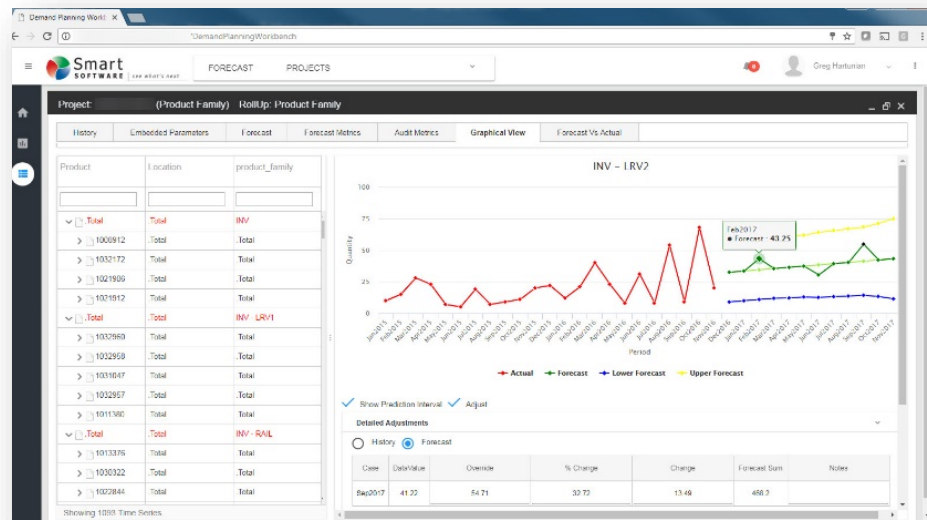
Smart Inventory Optimization

Epicor Smart Inventory Optimization delivers cloud-based inventory policy decision support and the means to share, collaborate, and track the impact of your inventory planning policy. Epicor Smart Inventory Optimization reconciles holding costs, ordering costs, and stock-out costs in order to prescribe the inventory policy and service levels that yields the total lowest cost. You can optionally assign service-level constraints and targets and propose multiple policies for consideration. Then share proposed policies and agree on a consensus plan that best meets the company's objectives.
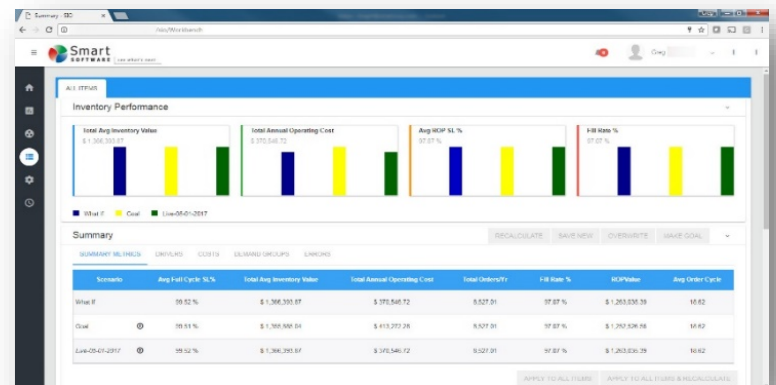
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Smart Operational Analytics

Epicor Smart Operational Analytics is a cloud-based reporting platform that provides a fast, easily understood, current perspective on the state of your inventory. It performs against critical metrics, actual supplier lead times, and opportunities to rebalance stocks across facilities to help uncover root causes of operational inefficiencies. Get a 360-degree view of your inventory—identify value, stocking trends, overstocks, understocks, and potential order cancellations. You can also identify root causes of stock-outs, excess inventory, and late deliveries. User-defined filters enable staff to drill into and report on any subset of the inventory.

Smart Software products require a subscription.
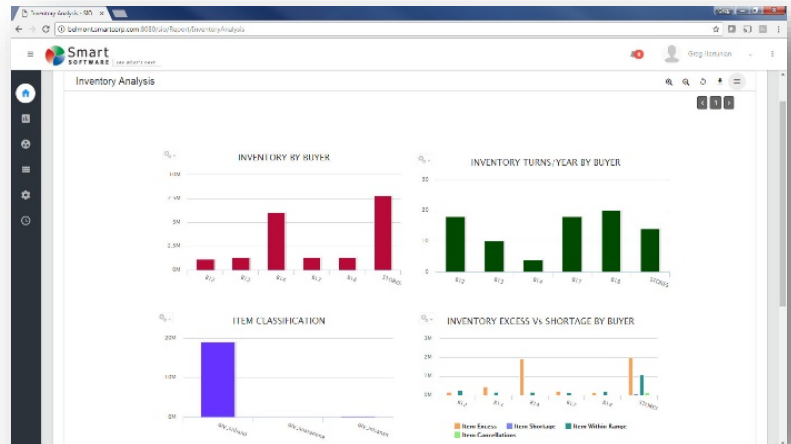
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Service Management

Epicor Field Service Automation (FSA)

Enhance productivity and service operations with scheduling automation and integrated field mobility. Connect your office and field staff with the information and processes they need to serve customers more efficiently. Epicor FSA drives field productivity for individuals and crews, shrinks response times, lower costs, improves first-time completion ratios, and increases customer satisfaction to build a competitive advantage.

Built on modern and proven technologies, this solution is easy to use and compatible with your existing infrastructure. You can take advantage of existing IT investments, deploy with minimal training, offer your people familiar time-saving tools, and achieve a rapid return on investment (ROI) at a low total cost of ownership (TCO).
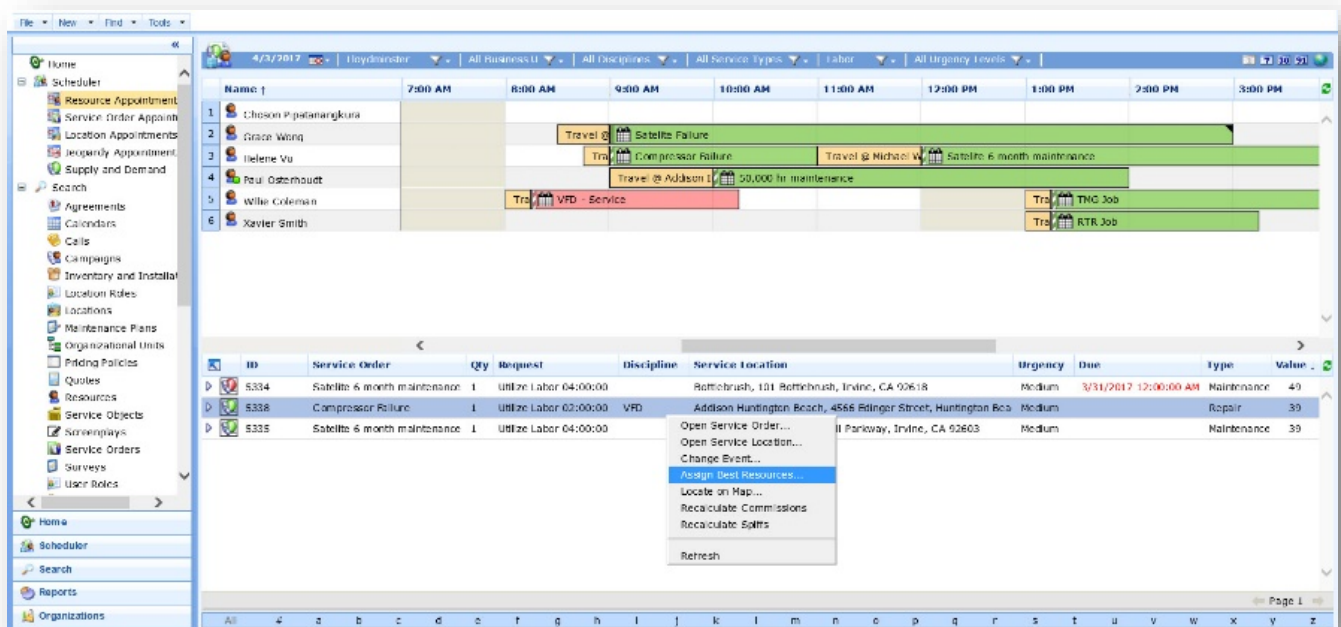
Easy-to-read scheduling board

Integrate people and information to empower your workforce

Enhance the flow of business and technical information while connecting dispersed employees through convenient mobile devices. Automate manual processes, share best practices and procedural checklists, and track service inventory in real time.

Speed-up and optimize scheduling and dispatch

Quickly understand service urgency and resource status, and easily match the best resources for each task using best-fit assignment.

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Seamless integration with Epicor ERP

The integration between Epicor ERP and Epicor Field Service Automation delivers a comprehensive solution across the full process life cycle. Epicor ERP serves as the main data repository covering key areas like customer, sales, and financial management while Epicor FSA manages the customer and field service operations—providing a first-class service scheduling and mobility experience.

Streamline the work order life cycle

Enable rapid-response call taking and speed work order creation, assignment, dispatch, closure, and billing. Integrated information and automated processes eliminate manual tasks and redundant data entry.

Manage contracts, warranties, and assets more efficiently

Track asset histories and automate work order generation and billing. Manage terms, rates, and timeframes.

Gain real-time insight for improvement

Access operational and resource information at a glance. Track trends and understand costs so you can manage performance and make better decisions for enhanced profitability.

Call center, scheduling, and dispatch management

Quickly capture service needs and access customer, site, and equipment information to shorten the time between call receipt and job assignment. Track resource commitments to match tasks to the best available resources then generate work orders. Create daily or weekly schedules automatically or by using drag-and-drop tools.

Work order life-cycle management

View and manage work orders by customer, location, schedule, or assigned resources with color-coding and visual icons providing at-a-glance insight into urgency and status.

Contract and service-level agreement (SLA) management

Manage terms, apply different billing rates for various types of work and materials, manage SLAs, maintain hierarchical relationships among customers and locations, and automate escalations and invoicing.

Asset and warranty management

Classify assets with bar codes or serial numbers, then track the asset's location plus maintenance and repair information. Capture costs, revenues, and time spent on each asset. Track warranties against assets and provide field staff with visibility into terms and expiration dates. Ensure service and billing conform to warranty stipulations.

Resource tracking and performance management

Integrate information about personnel qualifications, certifications, and experience into work assignments. Automate crew calendars and timekeeping, and generate individual performance scorecards.

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Vendor and customer portal

Provide customers and vendors with self-service capabilities—including work order status, new work requests, and the ability to capture work performed—through integration with standard web services.

Sales and marketing

Provide robust quoting capabilities in the office and field, including financing options, sales tax, customer price books, rebates, and bundling of goods and services for side-by-side comparison. Set up and track marketing campaigns, sales metrics, and goals with associated commission and spiff plans.

Workflow

Manage your unique call center and field-based processes through our dynamic screenplay workflow engine. Screenplay enables you to configure the user experience to match your unique business processes, driving standardization, data capture, and usability.

Inventory management

Track service stock accurately at mobile and fixed locations to reduce write-offs. Adjust inventory records automatically based on field use or in-route purchasing. Effectively forecast materials requirements and take advantage of bulk and just-in-time ordering. Check inventory locations and order materials directly from the field.

Maps® integration

Take advantage of Maps integration to provide office and field staff with street-level mapping, route visibility, and turn-by-turn directions. Use any GPS tracking system in the field to quickly locate resources geographically from the office and optimize work assignment.

Mobile Experience

Complete work tickets, review service history, manage inventory, access customer pricing, and obtain electronic signatures—all with automated real-time capture. Our intuitive, user friendly, multi-platform HTML5 mobility solution runs on a variety of devices. Use smartphones, tablets, and laptops for both online and offline communications with the back office.

Epicor FSA requires a separate license.
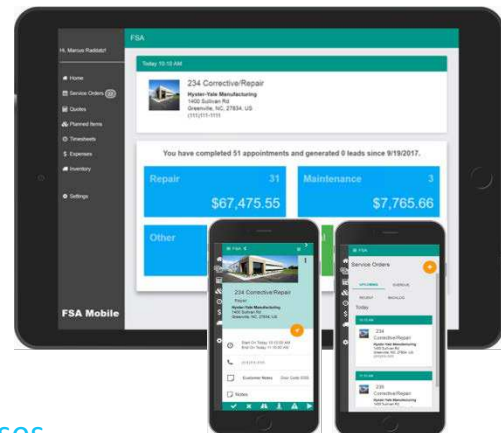
Revenue Recognition—Non-Reimbursable Expenses

On a project, you want to recognize a non-reimbursable expense as other direct cost (ODC) without the need to create and post an AP invoice for a Job Miscellaneous charge(s) linked to the expense. The Build Project Analyses process now recognizes the non-reimbursable expense on approval.

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Financial Management

Non-Recoverable Taxes

New capability in 10.2 acknowledges that not all tax paid on materials in the manufacturing process are recoverable. The cost of these taxes needs to be allocated to the material for accurate costing purposes. For example, tariffs and other cross-country taxes are oftentimes non-recoverable and allocated to the material cost of the product being produced.

Inventory managers would like to be able to store the amount of non-recoverable taxes in part transactions so that it can be accounted on a different GL account. An AP clerk wants a non-recoverable tax amount to be considered in the cost of the items you purchase from your suppliers so the application reflects the real material unit cost. Additionally, users can now book these taxes directly to the appropriate expense account.

Accounts Payable—U.S. 1099 Updates, TIN Validation, and New 1096 Form

A new 1099 conversion process has been developed for the U.S. The conversion process creates boxes and codes for the 1099-MISC (Miscellaneous Income) form, 1099-DIV (Dividends) form, and 1099-INT (Interest Income) form and sets the System flag for the boxes and codes it creates. User-definable forms offer greater flexibility. The form types you created are linked to 1099 Box Number Maintenance where you can view and create boxes that belong to the selected form.

Epicor ERP simplifies TIN validation for users. Forms identify the payee and payment recipient through their federal identification number that can be an EIN, TIN, or SSN. The TIN validation program exports TINs into a flat file for bulk validation (batches up to 100,000) through a TIN validation service provided by IRS TIN and name combinations through submission of a text file.

A new Print 1096 Form report program allows users to print a 1096 form in a pre-printed format. A separate 1096 form is required with the submission of each type of 1099 form (1099-MISC, 1099-DIV, 1099-INT, or others required by the IRS, if they are defined).

Value-Added Tax (VAT) Reporting Date Selections

To simplify VAT reporting and analysis, new date selection criteria allows users to specify the date basis and whether backdated items are displayed.

Asset Annual Schedule Report Enhancements

To enable reconciliation of Asset Management transactions with corresponding GL entries, several enhancements have been introduced to the Asset Annual Schedule Report. Posting status of posted, unposted, or both offer greater visibility of transactions. Also, regardless of fiscal period, a date range of transactions is available. Cutoff date is still available.

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Asset Depreciation Updates

Asset depreciation methods in Epicor ERP now are not based on the rule of the first year. Previously, any change in asset cost that was introduced with asset addition or asset impairment in the first year of depreciation always impacted depreciation base as if the change had happened at the very first day of depreciation. Now the behavior is defined by a Retrospective Adjustment option on Asset Maintenance in both the first and subsequent years of asset life.

Below are the new formulas used to calculate depreciation:

- ▶ Life straight line: annual charge = (book value - residual value) / remaining years
- ▶ Sum of the years digits: annual charge = (asset cost - residual value) * remaining years as of beginning of the year / sum of year digits
- ▶ Declining balance: annual charge = book value as of beginning of the year * annual depreciation rate / 100 / estimated life years as of beginning of the year

Predefined calculation methods such as Declining Balance to Straight Line or MACRS (USA) do not exist anymore. If you want to use them, you can use the Switch to Alternative Method functionality in Depreciation Method Maintenance with predefined formulas Declining Balance and Life Straight Line.

General Ledger—Easier Upgradability of Posting Rule Changes

A new Customization sheet is now available in the Booking Rules > Operations area to enable users to customize their posting rules in a layer that is easily brought over in upgrades. Previously, users would update the base rules and manage changes overwritten by rules changes in the upgrade.

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ICE 3.1 Framework and Tools

Security—Control on Blank Passwords

New functionality limits the use of blank passwords with a new control for security managers that allows a reset password to blank function. Up to three uses of the blank password by a user are then available. Additional features expire all blank passwords and optionally disable accounts with blank passwords.

Security—Reset Passwords

In addition to reset to blank, the Reset Password function can offer a temporary password to be generated and emailed to either the email address on the user record or an email address entered immediately by the security manager.

Security—Business Activity Queries (BAQ)

A new Security ID designation for the BAQ allows individual BAQs to be limited to user groups, specific users, and/or both.

Company-Specific Time Zone Support

The time zone for the company can be configured outside the application server time zone. Users no longer need to set up separate application servers for each time zone and override the transaction date. This is particularly useful for a multicompany environment with companies in different time zone locations. By using the new time zone functionality, dates in screens and reports be consistent with the current date and time of that time zone region. Additionally, results from BAQs for the value of "today" and other dependent constants is calculated based on the company time zone of a user's current company. It is not recalculated for each company from which the data is retrieved by Cross-Company BAQ.

Business Process Management (BPM) Workflow Designer Toolbar

The BPM Workflow Designer now includes a toolbar that gives you quick access to commonly used actions and features while designing your workflow. The list of available toolbar options includes:

- ▶ Save—enabled after changes to a directive are made—security validation is applied on each Save.
- ▶ Validate—always enabled, controls if all element parameters are set up in the way BPM expects.
- ▶ Copy/Paste—use these buttons to copy and paste workflow items within the currently opened directive or to another directive. You can perform the same actions using the Ctrl+C and Ctrl+V keyboard shortcuts.
- ▶ Undo/Redo—use these buttons to revert or restore your previous design actions with the BPM workflow.
- ▶ Usings and References—provides access to directive Usings and References window. Available to BPM Advanced Users only.

Solution Manager Enhancements

Solution Manager simplifies the management of custom solutions and reduces the effort and time needed to upgrade. Several new features offer greater control of custom solutions and deliver greater ease in upgrading. These new features include the following:

▶ Solution Reference—When building a new solution, users can supply a Solution Reference such as "10.2.100 Final." This allows the creator to use their own scheme to track what instance of a solution package was installed or is being installed. The Solution Reference is stored in the manifest data within the generated CAB file. Solutions history is written when installing a solution. It also displays on the grid used to delete solutions.

▶ Solution Build Number—Each solution is now provided with a Solution Build Number. This value automatically displays in the Solution Workbench in a read-only field named Build Iteration. When the solution is installed, the system checks this value. If you attempt to install an older version of the current solution, a warning message displays, indicating you are attempting to overwrite a newer build.

▶ Database SQL Scripts—You can add Database SQL Scripts (.sql) into a solution. When the solution is built and installed on a system, database scripts become available for execution to perform further manipulation of data. Only scripts provided by Epicor directly are supported for manipulation of Epicor ERP data. Epicor recommends making database changes through secure web services with either the Database Management Tool (DMT) or Service Connect.

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Customization—Developer Hot Keys

Use new hot keys to quickly access developer mode and make changes in Epicor ERP.

To activate Developer Mode:

- ▶ When you run the application using the Classic Style (Epicor 9.xx style), on the Main menu, from the Options menu, select Developer Mode.
- ▶ When you run the application using the Modern Shell (Epicor 10.xx style), click the bottom arrow to display the toolbar, then select the Developer Mode (wrench) button.
- ▶ Alternately in the Modern Shell menu, click the Settings tile, then from the General Options list, select the Developer Mode option.
- ▶ Now you can also press Ctrl+Shift+D to activate Developer Mode both in Classic Style and in the Modern Shell menu.

Electronic Compliance Enhancements

The Electronic Compliance engine is used to handle electronic documentation requirements and is an incredibly flexible tool for business. A new simplification to the interface for managing elements provides drag-and-drop technology. Also, users can easily document elements with new description capabilities.

Quick Search Enhancements

For starters, users can now copy Quick Search, then adjust the search to their needs. You can also create a named search for Quick Search using the Named Search button on the Quick Search form.

Improvements to Existing CSFs

Improvements have been made to the following CSFs in 10.2.100. See the feature summary for a complete list of features added to support these countries:

- ▶ Australia
- ▶ China
- ▶ India
- ▶ Malaysia
- ▶ Mexico
- ▶ Netherlands

- ▶ New Zealand
- ▶ Peru
- ▶ SEPA
- ▶ Thailand
- ▶ United States
- ▶ Vietnam

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Third-Party Applications and Integrations

As part of the Epicor ERP 10.2.100 release, we continue to support a range of related applications for the manufacturing, distribution, and services sectors. While a number of these third-party applications do support global enterprises, some do not at this time. As part of the implementation of the software, the Epicor team will work with our customers to determine the most appropriate solutions for your business needs with respect to the third-party applications and integrations we offer.

Epicor 10.2.100 includes support for the following products at release:

- ▶ 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™ from QBuild Software Corporation
- ▶ Epicor® Product Lifecycle Management from PROCAD GmbH & Co. KG
- ▶ Epicor® Advanced Print Management (DocLink™ 3.1) from Altec, Inc.
- ▶ 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
- ▶ 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® from Smart Software, Inc.
- ▶ ForecastPRO® for Epicor from Business Forecast Systems, Inc.
- ▶ XSOL InOrder from XSOL, Ltd.
- ▶ Workforce Now® from ADP, LLC

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Retired Products

With the release of 10.2.100, Epicor will not be bringing forward several extension solutions because of obsolescence, next-generation replacement product availability, or low product market acceptance. In some cases, there may be business terms tied to these changes. In these cases, your customer account manager will have the latest information. Below is a list of these products for the 10.2.100 release. We will continue to support these products on earlier releases of Epicor ERP.

- ▶ Mobile Field Service
- ▶ Mobile FS Schedule & Dispatch
- ▶ Mobile Sales Assist
- ▶ Mobile Time
- ▶ Mobile Expense
- ▶ Mobile Form Builder Tool Kit
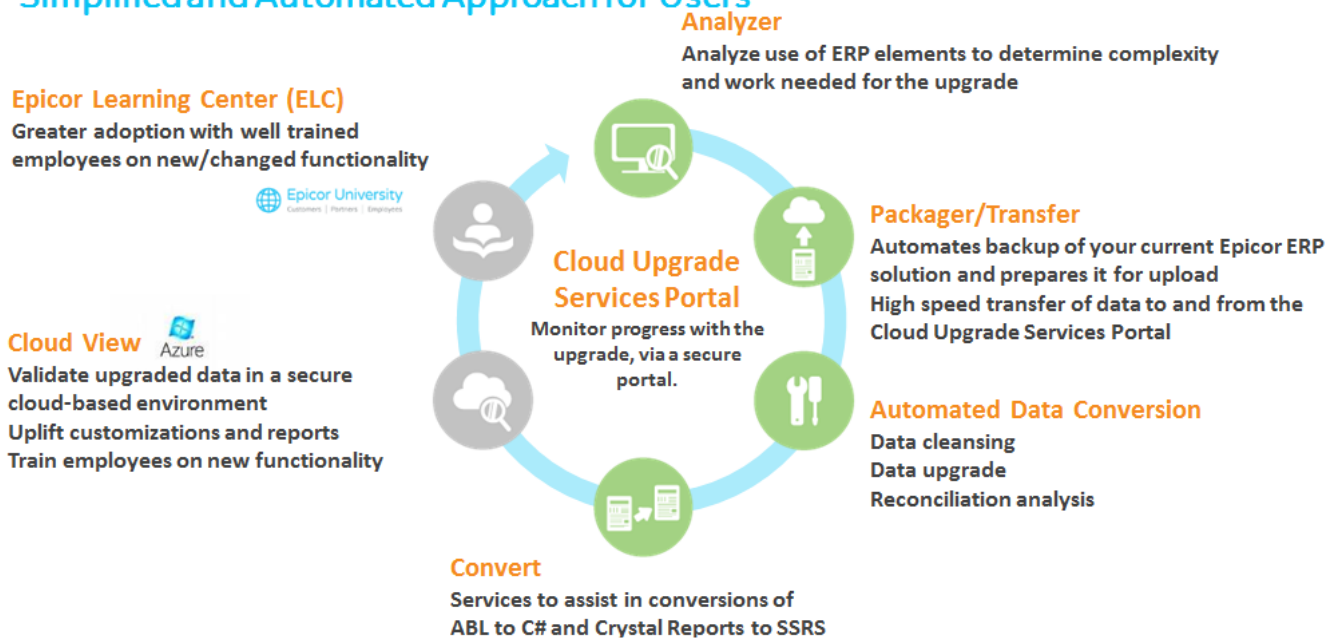
Compatibility

The technical foundation of Epicor 10.2 has been tested on the latest releases from Microsoft, including Windows 10, Microsoft Internet Explorer 11, and Microsoft SQL Server® 2016. It also supports several browsers, including Mozilla Firefox®, Apple Safari®, and Google Chrome®. For more information about compatibility see the Epicor ERP Hardware Sizing Guide on EpicWeb.

Upgrading to 10.2

At Epicor, we firmly believe that all of our users will gain significant benefit from staying current on new versions of the Epicor ERP software. For users on the Epicor ERP 10 platform, the upgrade process is greatly simplified and allows for movement between releases without stepping through each release. For example, users can move from 10.1.400 to 10.2 without taking intermediate steps for the releases between.

In order to simplify the upgrade process from Vantage, Vista, and Epicor 9 to ERP 10.2, we have invested heavily in new tooling and services dedicated to the process of upgrading.

Epicor Cloud Upgrade Services
Simplified and Automated Approach for Users

Analyzer
Analyze use of ERP elements to determine complexity and work needed for the upgrade

Epicor Learning Center (ELC)
Greater adoption with well trained employees on new/changed functionality
Epicor University
Customers | Partners | Employees

Cloud View Azure
Validate upgraded data in a secure cloud-based environment
Uplift customizations and reports
Train employees on new functionality

Cloud Upgrade Services Portal
Monitor progress with the upgrade, via a secure portal.

Packager/Transfer
Automates backup of your current Epicor ERP solution and prepares it for upload
High speed transfer of data to and from the Cloud Upgrade Services Portal

Automated Data Conversion
Data cleansing
Data upgrade
Reconciliation analysis

Convert
Services to assist in conversions of ABL to C# and Crystal Reports to SSRS

Cloud Upgrade Services Available Vantage, Vista, and Epicor ERP 9 Users

To encourage our Vantage, Vista, and Epicor ERP 9 users to upgrade to our current version, we have invested in tooling and services dedicated to ease the process of upgrading. Taking advantage of cloud resources has helped our teams reach new levels of efficiency and collaboration in the upgrade process. On-premises review is available as well. Contact your customer account manager to start the upgrade process today.

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Analyzer

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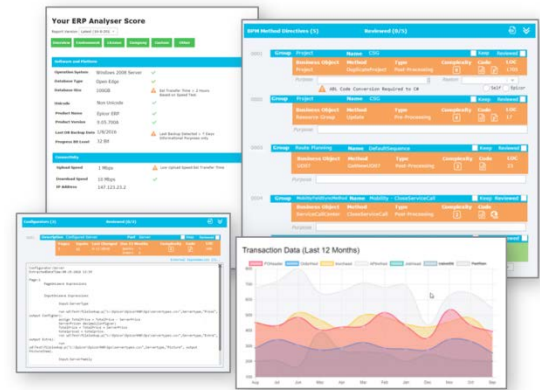
Packager/Transfer

Packager/Transfer is a simple-to-use, high-performing solution for packing up ERP data and transferring it securely to a secure cloud environment where data migration occurs.

Data Upgrade

Upgrading data is greatly simplified with a single solution that performs the data analysis and resolves the data issues before doing the data migration steps. In the past, these were separate processes that involved user intervention prior to the data migration process. In addition, Epicor ERP 9 users no longer need to be at a specific release of 9.05—rather the data migration automatically upgrades the data from any version. For Vantage and Vista uses, the upgrade works for any database at version 8.03.305 and above. Earlier versions can upgrade to 8.03.305 regionally or with assistance, then leverage the tooling for the rest of the upgrade. As Epicor is able to leverage cloud resources, the process is fast. A portal offers visualization of the converting data with status at each step of the process. The standard conversion package offers three passes of the conversion for optimal use.

Reconciliation Reporting

After upgrading data, one of the challenges for businesses is to validate the data. In the past, users would run 13 reports before updating their data, then rerun them in the new environment and compare. This is both a time-consuming and risky part of the upgrade, as missed details can create frustration and pain down the road. Epicor has addressed this pain by providing reconciliation analysis that does the work for you, even pointing out the data causing the problem. The reports included are:

- ▶ AP Aging
- ▶ General Ledger—Opening Balance
- ▶ AR Aging
- ▶ General Ledger—Debit
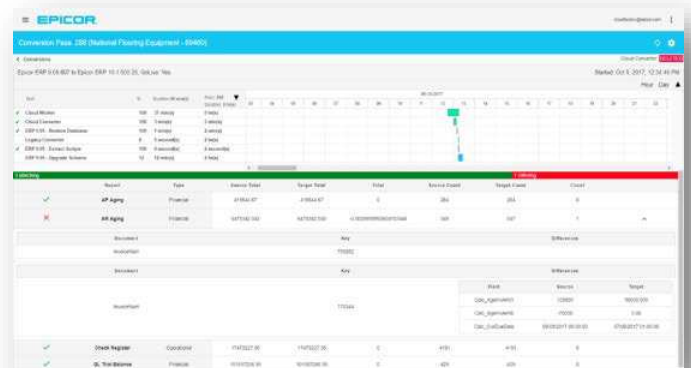
- ▶ Check Register
- ▶ AP Received Not Invoiced
- ▶ GL Trial Balance
- ▶ General Ledger—Credit
- ▶ Open Purchase Orders
- ▶ Material Transactions
- ▶ Quote Detail
- ▶ Sales Order Backlog
- ▶ Scheduled Shipments

Cloud View

Once data has been converted, Epicor offers a secure cloud environment where users can log into their data in an Epicor ERP 10.2 environment. This is immediately following data conversion, and offers users the ability to test out their data in the new environment, start user training and systems testing, even upgrade customizations and configurations. Epicor offers a tool in Epicor ERP called Solution Manager that enables users to save entire solutions at a time and export and import them between releases. This is very powerful during the upgrade.

Epicor Learning Center (ELC) Upgrade Essentials Courses

Epicor University offers 65+ Upgrade Essentials courses designed to train users on the new functionality they will experience in the new release. These courses are available to all users on maintenance and support, regardless of whether you have purchased Embedded Education.

Epicor Support

Epicor stands behind all of its products with an award-winning support organization capable of serving our global user base efficiently and effectively. With more than 40 years of experience supporting users, Epicor Support has a proven history in user satisfaction and increasing the value that they derive from our software.

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

Application Support Can:

- ▶ Assist users with day-to-day use of the applications
- ▶ Resolve inconsistencies or product deficiencies
- ▶ Offer guidance on system workflow and processes
- ▶ Provide product work-aids and tools that help end-users

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Technical Support Can:

- ▶ Assist IT staff in resolving technical system issues
- ▶ Perform system diagnostics
- ▶ Provide database support and performance tuning
- ▶ Offer guidance and support on reporting tools

Extended Support Hours and Coverage

Epicor Support understands that your business and support needs are not always within business hours. With the purchase of Epicor Premier Support and Maintenance Plan, we provide extended support hours. Extended support includes 24-hour support Monday through Friday. Users can also have access to extended weekend coverage. By appointment, users that require additional support coverage for planned events, like upgrades that require support over a weekend, are provided a personal support contact.

Proactive Services

Additional services from Epicor Support including system audits and optimization, health checks, and utilization analysis can help you manage your risk and maximize your uptime. These services are available at an additional cost.

Advanced Support Tools

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

Online Support Center

EpicCare allows you to get more from your Epicor ERP 10.2 solution. EpicCare gives you one place to get the help you need, providing you 24x7 access to information, resources, and services, account information, incident tracking, our support Knowledge Base, product documentation and downloads, online forums and communities, and other helpful information.

Product Updates

As part of your maintenance and support agreement, you have access to product patches, service packs, and new versions—including this release of Epicor ERP. The periodically released product updates contain recognized issues identified through user feedback, requested new or enhanced feature/functionality, government regulatory requirements, and/or architectural/performance improvements. Access to the latest Epicor software allows users to stay current with technology and both protect and extend their business and IT investment.

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Software Support Lifeycle

Epicor is committed to being your longtime ERP technology partner and delivering innovative tools to your business on a regular basis. To promote focus on new technologies, Epicor has developed a 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 for more information.

As of the release of this guide, the following releases are on active support. Earlier releases are on sustaining support.

The level of support available for the different releases of Epicor ERP

Product Release	Release Date	Support Stage	End / Transition Date	Notes
Epicor ERP 10.2.100	12/06/2017	Active	Move to Sustaining 12/06/2019	
Epicor ERP 10.1.600	05/15/2017	Active	Move to Sustaining 05/15/2019	
Epicor ERP 10.1.500	11/08/2016	Active	Active Support extended thru 12/31/2018	
Epicor ERP 10.1.400	12/17/2015	Enhanced Sustaining	Active Support thru 12/17/2017. Limited development support* thru 12/31/2018	Telephone support transition 12/31/2018 Additional module sales end 12/31/2018
Epicor ERP 10.0.700 (earlier is in Sustaining)	08/04/2014	Enhanced Sustaining	Limited development support* thru 6/30/2018	Telephone support transition 6/30/2018 Additional module sales end 6/30/2018
Epicor 9.05.702 (and earlier)	06/12/2013	Sustaining	Currently in Sustaining	Telephone support transition 6/30/2018 Additional module sales end 3/30/2018
Vantage / Vista 8.03.400 (and earlier)	07/09/2012	Sustaining	Currently in Sustaining	Telephone support transition 6/30/2018 Additional module sales end 3/30/2018

Epicor is providing an "Enhanced" Sustaining support experience for some of our older releases to allow our customers additional time to plan and complete their move to the latest Epicor ERP release. Additionally – we will not transition to Online Support only for Sustaining Releases until June 2018. Customization and Implementation Services end when Additional Module sales end.

*includes critical patches and security fixes, and limited compliance and regulatory updates only

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 benefit from their knowledge and experiences with Epicor software. User groups also provide a critical link between Epicor and our user community, providing a format for users to engage with Epicor in an open, collaborative environment as we work with them when planning future product releases.

Epicor University

Epicor University delivers a suite of tools that align to the different learning styles and needs of your employees.

- ▶ Training On Demand video-based courses
- ▶ Embedded Education self-paced courses
- ▶ Role-based training agendas
- ▶ Course tests
- ▶ Online help

- ▶ Release documentation
- ▶ Live training

These tools are accessible from your Epicor product, the EpicWeb website, and via the Epicor Learning Center—a comprehensive learning management system. Regardless of learning style preferences, Epicor University has an extensive portfolio of training resources for all experience levels and job roles. We offer a full suite of learning opportunities to meet your training needs. From implementation to training new employees, Epicor University closes your training gaps. Epicor University can help you achieve your business goals.

Epicor Learning Center (ELC) allows you to deliver, manage, and track your company's training needs from one central location. Here you can access course materials, set and manage employee assignments, register for classes, and track training progress and test scores.

The ELC contains a broad catalog of on-demand courses and tests. Role-based agendas help you align courses and exams to each employee's training needs, so they can learn a new topic, prepare for an upgrade, launch a new application, or dive more deeply into current applications.

Administrators may view individual test results or aggregate scores across the entire organization to track knowledge levels. Best of all, tests are not limited to Epicor content. You can add proprietary questions and tests to the ELC, then assign and track them as desired.

Instructor-Led Training

Epicor offers over 100+ training courses for Epicor ERP 10. Each course is led by a professional instructor and outlines concepts, provides detailed explanations, and incorporates hands-on activities for a blended learning experience. Epicor courses are suitable for employees at all levels of an organization—from top management to "super-users."

Epicor Learning Center (ELC)

Access the Epicor Learning Center (ELC) from EpicWeb to find the ongoing calendar of scheduled courses. For convenience, courses can be delivered virtually, over the web, or hosted at Epicor training facilities throughout the world.

On-site training

With onsite training, Epicor instructors can host the course at the user's facility. This option is ideal for users who want dedicated classes for their employees' training, and/or want to tailor the training to meet their specific or unique requirements. This option can be a cost-effective solution for users that have large groups to train.

Virtual Training

Virtual classes provide an online equivalent to our classroom courses and the same instructor-led experience at an attendee's desktop. Virtual classes provide a flexible and cost-saving alternative to the traditional classroom

setting. Attendees simply require a phone and Internet connection to participate in the real-time, hands-on interactive training.

Self-Paced Education

Epicor self-paced education options provide excellent opportunities for learning within Epicor ERP 10 or via the Epicor Learning Center web portal. Embedded Education and the Epicor Learning Center work together via links and agendas and complement each other. Users with Embedded Education also have access to additional learning tools in Epicor Learning Center such as Training on Demand courses, tests, and role-based training agendas.

Embedded Education is a self-paced training tool accessed directly within your training installation of Epicor ERP. Users can access more than 100 courses, each with detailed explanations and hands-on exercises. Learners are able to easily navigate between courses and the related application using real-life business data through an Epicor education database. The courses provide a structured and repeatable learning experience for initial and ongoing training.

New in Epicor ERP 10.2

- ▶ New (or revised) are the following embedded education courses:
  - o Epicor Data Discovery (EDD)—New
  - o Epicor Field Service Automation (delivered live only)—New
  - o Epicor SSRS—Direct Access to SQL Server—Updated
  - o Posting Rules—Updated
  - o MES and Handheld—Updated
- ▶ Training On Demand courses on the following topics are available:
  - o Field Service Automation
  - o EDD
  - o Legal Numbering
  - o Non-Recoverable Taxes
  - o Externalization of Posting Rules
  - o Mattec Integration
  - o Epicor ERP Home Page
  - o Warranty Effective Dates
  - o Company-Specific Time Zone
  - o Mobile CRM
  - o Installation
  - o Salesforce Integration
  - o 1099 Updates

Learning Resources

Learning resources supplement a company's educational program and are developed for a wide audience—management, technical, and end-users. They provide detailed information on installing, configuring, and using Epicor applications. The following resources are all accessible from within Epicor ERP 10 (except installation guides, which are found on EpicWeb):

- ► User gides: Illustrated, detailed instructions that walk users through major application functions
- ► Feature summaries: Concise overviews of the new functionality within a new product release
- ► Online help/field help: Document application feature/functionality, field definitions, tips, and examples
- ► Technical reference guides: In-depth information on the most complex functionality and business logic
- ► Installation guides: Comprehensive instructions on installing applications

Epicor University offerings for the 10.2.100 Release

Supply Chain Management (SCM) and Manufacturing

Supply Chain Management (SCM) and Manufacturing Overview ●

10.2 Delta Education Manufacturing ●

Mobile CRM
- Introducing Mobile CRM ●
- From Opportunity to Order On Mobile CRM ●
- Managing Leads and Contacts on Mobile CRM ●
- Setting Up Mobile CRM on Your Device ●

Salesforce.com Integration
- See the On-Hand Quantity for Parts in Salesforce.com ●
- Running the Salesforce Synchronization Process ●
- Sales Kits in Salesforce.com ●
- Bi-Directional Quote Synchronization with Salesforce.com ●

Field Service Automation
- Introduction to Epicor Field Service Automation ●
- Live Field Service Automation Course ●

Customer Shipment Entry
- Warranty Effective Dates ●

Service Management
- Warranty Effective Dates ●

Mattec Integration
- Export to Mattec Process ●

Finance

Finance Overview ●

10.2 Delta Education Financials ●

Posting Engine
- Customize Posting Rules for Accurate Financial Accounting ●
- Posting Rules (Updated) ●
- Live Posting Rules Course ●

Taxes
- Epicor Payment Gateway ●
- Company Specific Time Zones ●
- Using Non-Recoverable Taxes ●
- Using both Recoverable and Non-Recoverable Taxes ●
- Setting Up and Using 1099 Forms ●
- Validating Tax Identification Numbers for 1099 Processing ●

Legal Numbers
- Formatting Legal Numbers ●
- Change History for Legal Numbers ●
- Legal Number History Report ●

Credit Card Processing
- Epicor Payment Gateway ●

Company Settings
- Company Specific Time Zones ●

Tools

Tools Overview ●

10.2 Delta Education Tools ●

Epicor Data Discovery (EDD)
- Creating Runtime Views with EDD ●
- Exploring Runtime Views with EDD ●
- Epicor Data Discovery ●
- Live Epicor Data Discovery Course ●

Additional Content
- Epicor SSRS–Direct Access to SQL Server (Updated) ●
- MES and Handheld (Updated) ●
- Live Epicor SSRS Courses ●

Documentation
- Online Help ●
- Feature Summaries ●
- User Guides ●
- Technical Reference Guides ●
- Release Documentation ●

Learning asset	Getting there
Training on Demand	EpicWeb > Education > Epicor Learning Center
Embedded Education	In Epicor ERP (License available from your customer account manager)
Documentation	EpicWeb > Documentation
Instructor led classes	Email—education@epicor.com

● Training on Demand   ● Embedded Education   ● Instructor-Led Class   ● Documents and Release guides

Epicor Learning Center

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Epicor Upgrade Services

The Epicor Upgrade Program uses combined services and cloud-enabled tooling to assist with your upgrade. Epicor recommends focusing upgrade efforts on adoption of the newest release and the critical path training and customizations needed for your business. This will shorten the upgrade timeline, deliver a faster ROI, and offer immediate business benefits through transformation. We also offer post-release resources and value-added packages designed to optimize your use of the new release once you are on the new foundation.

Epicor Professional Services provides a variety of services and programs including:

- ▶ Project management services—reducing the risk that your project for upgrading is on time and on budget
- ▶ Technical consulting services—the infrastructure providing the foundation of your Epicor ERP is sound and optimized for use
- ▶ Application consulting services—assist with data validation and subject-matter expertise
- ▶ Data upgrade services—automate upgrading your data and offer high-integrity and performance of your business-critical data
- ▶ Cloud services—facilitate rapid capture, conversion, and delivery of elements such as data upgrades, customizations, custom reports, and configurations

Upgrade Signature Methodology

The Epicor Signature Methodology is leveraged in every Epicor Professional Services engagement to implement and upgrade your ERP software. Decades of successful software implementations and upgrades have refined the program, resulting in minimized risk, cost, and business disruption. The process of upgrading has driven the need for a specific upgrade methodology to move your ERP to the latest Epicor ERP release. The upgrade program incorporates the elements needed from the Upgrade Signature Methodology with the additional assistance your business may need—including technical consulting, customization services, reporting services, configurator services, EDI services, and onsite business consulting.

Visit the Upgrade and Migration Center on EpicWeb for more information and resources.

About Epicor

Epicor Software Corporation drives business growth. We provide flexible, industry-specific software that is designed around the needs of our manufacturing, distribution, retail, and service industry customers. More than 40 years of experience with our customers' unique business processes and operational requirements is built into every solution—in the cloud or on premises. With a deep understanding of your industry, Epicor solutions spur growth while managing complexity. The result is powerful solutions that free your resources so you can grow your business. For more information, connect with Epicor or visit www.epicor.com.

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