Epicor ERP 10.2.300 Release Guide

User Briefing Paper

EPICOR.

EPICOR.

Table of Contents

Executive Overview

At Insights—our annual user conference—in May of 2018, Epicor announced a strategic partnership with Microsoft Azure to support Epicor cloud services and provide infrastructure for our cloud solutions. Market trends show that a partnership with a public cloud vendor makes sense, as a recent report by IDC shows that Discrete Manufacturing is predicted to lead all industries in public cloud spending with $19.7B.

We are seeing the results of the cloud. At the time of this release, there are 426 companies leveraging Epicor ERP 10.2.300 in the cloud. Even more who deferred are expected to go live shortly. This is compared to the 374 companies that deployed our last release—10.2.200—in the cloud.

> *"Standardizing cloud deployment of its world-class manufacturing and distribution solutions on Microsoft Azure is a natural step for Epicor with its history of leveraging forward-looking technology to deliver the utmost value to its customers. With Epicor solutions running in the cloud, customers will reap the benefits of greater agility, faster innovation, and favorable economics of Azure as they embrace digital transformation."*
>
> *—David Willis, Corporate Vice President | Microsoft*

Cloud first

Guided by our cloud-first strategy and with the release of 10.2.300, Epicor users are starting to see the benefits of this partnership with Microsoft Azure—regardless of their method of deployment.

▶ Epicor Cloud Upgrade Services is using cloud resources to move Vantage/Vista, Epicor ERP 9, and 10.0 customers to the latest release. It is fast and scales easily.

▶ In-app messaging is now available to cloud users—providing greater clarity regarding the use of Epicor ERP in the cloud.

▶ Online help and education is available to all users—simplifying the installation and ongoing management of Epicor ERP.

▶ Azure AD Authentication is used for single sign-on capabilities for both cloud users and Mobile CRM users.

Experience UX

Experience plays a key role in this release. As manufacturers look to attract innovative talent to drive growth, digital experience is critical. The expectation for today's worker in business technology has grown to "any device" access with a clean look and feel. Epicor ERP 10.2.300 delivers our first step in a modern UX and features the Kinetic Framework that was introduced at Insights 2018. Kinetic is a best-in-class UX design and framework that delivers a modern look and feel while improving system usability and performance. In 10.2.300, the Active Home Page has been upgraded to Kinetic.

Some of our customers' businesses use a dealer network to sell their products and services. For these businesses, providing a digital experience to dealers is as important as the experience they provide to their own customers. To attract new levels of loyalty from dealers, Epicor introduces the Dealer Network Portal—a component of Epicor Commerce Connect (ECC) that is targeted at the dealer experience to drive growth through this important channel.

Analytics

Analytics continue to be a major area of investment with Epicor ERP. Epicor Data Discovery (EDD) introduced a new EDD Dashboard feature that is more similar to the embedded dashboard in Epicor ERP. In Epicor Data Analytics (EDA), new views of data are introduced for both Sales and Material Management, as well as a new content pack for Financial Statements—making it easier to align financial data to operational data. To simplify SSRS reporting, a new SSRS Report Design application also offers design, preview, and publish capabilities.

Industry

There are many investments in industry capabilities, but the one that provides perhaps the greatest impact is package control identification (PCID) expansion. Manufacturers that require strong traceability of products—anyone needing to group products together and still manage their location and path through the business—will find a need for PCID. As this investment touches many workflows throughout the Epicor ERP system, it is our largest investment in traceability in recent years.

Global

Each release continues to see investment in global requirements. 20 countries—including the U.S.—saw investment to stay current with recent changes. In the U.S. and Canada, a major feature set was developed to support wider use of electronic payments through ACH. The release included an expansion of ACH capabilities to include direct deposits for payroll and automatic withdrawals from customer accounts. We've also introduced FIPS 140-2 compliance for U.S. customers who comply with ITAR.

Simplified upgrade

At Epicor, we firmly believe that all of our users will gain significant benefits from staying current on new versions of the Epicor ERP software. In order to simplify the upgrade process, we have invested heavily in new tooling and services dedicated to upgrading. The upgrade process has been reimagined with automation and guidance tools throughout. We look forward to speaking with you about your next step to start taking advantage of Epicor ERP 10.2.300.

General

Microsoft® Azure®

Microsoft® Azure® helps deliver industry-specific solutions to facilitate faster growth and innovation

Epicor announced an expanded strategic partnership with Microsoft to deliver Epicor ERP in the cloud globally on the Microsoft Azure platform—empowering customers to drive faster growth and innovation as they move to digitally transform their businesses.

> *"Microsoft's focus on the 'Intelligent Cloud' and 'Intelligent Edge' complement our customer-centric focus," said Steve Murphy, CEO of Epicor. "We looked at several public cloud options. Microsoft Azure offers the best foundation for building and deploying enterprise business applications that will enable our customers' businesses to adapt and grow. Today, we are seeing more than three-quarters of prospects ask about cloud ERP. As that deployment model becomes the norm, we are ready to enable our customers to move to the cloud with confidence—leveraging the reliability, security, and scalability of Microsoft Azure."*

Unleashing the power of Epicor on the most trusted public cloud platform

Microsoft technologies will optimize productivity and innovation for Epicor, its customers, and partners. Epicor will leverage a range of Azure technologies—including Internet of Things (IoT), artificial intelligence (AI), and machine learning (ML)—to deliver ready-to-use, right-sized solutions for midmarket manufacturers and distributors. Epicor also plans to explore Microsoft's technologies for advanced search, speech-to-text, and other use cases to deliver modern human/machine interfaces that improve productivity for its customers.

Epicor Cloud ERP runs on Microsoft Azure
world-leading cloud platform driving radical growth

Reliable   Fast   Innovative   Global   Secure

Epicor ERP in the cloud now runs on Microsoft Azure as its underlying infrastructure. From a business perspective, this is transparent, but the underlying benefits are quite significant—Microsoft Azure is a world-leading cloud platform, and it's proven to drive radical growth.

- ▶ **Reliable**—This is a high-performance and disaster-proof network
- ▶ **Fast**—It features great ability to scale up or down to accommodate changing business needs
- ▶ **Innovative**—Azure offers a library of emerging technology tools which Epicor will incorporate into our applications to deliver greater customer value

- ▶ **Global**—Azure is available in more than 50 regions to support global expansion
- ▶ **Secure**—Best practice technologies such as advanced analytics, threat intelligence, and comprehensive compliance coverage safeguard your data and can even detect and remediate vulnerabilities in the network before they are exploited

On premises and cloud users benefit from the Microsoft Azure partnership

As Epicor finds new opportunities to leverage the Azure platform to provide a better experience with our solutions, all deployment models—both on premises and cloud—will benefit from this strategic partnership. In the coming pages, we will demonstrate various applications where Azure-enabled technologies are already in use. Some include high-performing and scalable cloud upgrades for older releases and the adoption of secure Azure Active Directory for single sign-on capabilities in Mobile CRM. For our Epicor ERP users on premises, Online Help features advanced Azure search capabilities, and for our Epicor ERP customers in the cloud, in-app messaging is now included.

In-app messaging for Epicor ERP in the cloud users

In-app messaging is designed to streamline communications between users and the Epicor Cloud Operations team so you never miss an important system update. Notifications are displayed while you are active within the ERP application itself. For users of Epicor ERP in the cloud, these notifications can deliver information about upgrades, system maintenance, training, marketing events, and more. Messages are queued visually through a message balloon indicator and will be available until they expire. You can set your preferences to ensure that messages you receive are relevant to you.

Active Home Page offers the New Kinetic Look and Feel

The Active Home Page is now optimized to offer a new level of experience for users. Built in the Epicor Kinetic Framework, the look and feel of the application has been designed to simplify and standardize the use of ERP. Standardizations that you will notice in the application include:
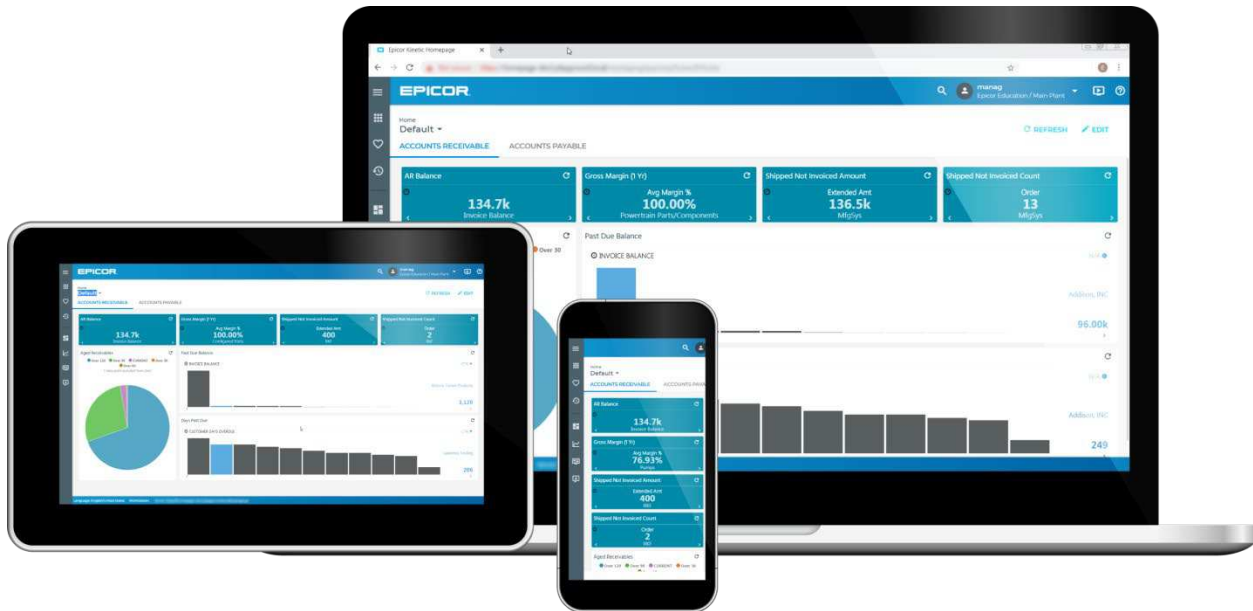
- ▶ A mobile browser base with responsive design to work on a standard desktop, tablet, or phone
- ▶ The ability to easily personalize experience(s) and have tabular views to choose from—expanding real estate in the home page
- ▶ Experiences or views can be role based such as executive, finance, supply chain or production
- ▶ Resizable, offering responsive design for tablets and phones
- ▶ Modify favorite properties to specify a company or site—useful for multicompany/site organizations—for the favorite
- ▶ Easily launch Epicor Data Discovery, a Business Activity Query (BAQ), an https website, or Enterprise Search—users can even build a simple ad-hoc query
- ▶ Expanded Help menu offers a library of resources available to users

Other improvements that you will see in the application include:

1. Easy access to primary navigation—providing effective use of clear labelling and straightforward, simple navigation
2. Tabs that are used to contextually alternate between views—helping users easily predict what they can find when selected
3. User account information still accessible but moved out of the way
4. Easily access the Knowledge on Demand video series from the Active Home Page and get started using this exciting feature today
5. Ability to add a new tab

Some additional improvements include:

Easy navigation with a breadcrumb trail to tell users where they are in the menu hierarchy and help them easily get back

Quick-click to add favorites with the ability to choose the folder

Ability to add/delete/resize widgets on the page

Online Help and Embedded Education Courses Available Through Azure

Epicor leverages the robust Microsoft Azure platform, and—as an added feature—Azure search uses natural language in addition to the exact match capabilities offered by the on premises version of help. Additionally, advanced search lets users define terms in exact match rather than all matches of either term. This will reduce the number of findings for faster searching. Find information faster, and never have to update yourself again, as it's done for you—this is a win for every Epicor ERP customer for both on premises and cloud models.

In-App Contextual Knowledge on Demand

Look for the play video icon throughout the Epicor ERP application for quick answers to question while working in ERP. Knowledge on Demand (KOD) is a new video-based, quick answer system available directly from the Epicor ERP solution. These short videos are one or two minutes long and act as a "cheat sheet" for any quick questions

you might have while working in your ERP system. In this release, the ERP forms that have an enabled Video Help menu are:

- ▶ AP Invoice Entry
- ▶ Job Entry
- ▶ Job Tracker
- ▶ Purchase Order Entry
- ▶ Customer Maintenance

Epicor Data Discovery Improvements

Experience and analytics continue to be an investment theme for Epicor ERP. In particular, the Epicor Data Discovery (EDD) capabilities are seeing increased customer adoption. Due to popular demand, EDD now offers simplified installation and update processes with a new command line tool for better data source organization and selection and the ability to redeploy system views after an installation or upgrade.

EDD BI Dashboard

Similar to Epicor ERP embedded dashboards, the EDD BI Dashboard is a single page that enables you to centralize and easily access the information that is important to you using visual representations. Dashboards can be customized by adding different visualization components. You can present data using Discovery Chart Views and Discovery KPI Views, and you can use cross filtering and shared dimensions between the views.

EDD Advanced

EDD Advanced allows customers to connect EDD to outside data sources—data sources other than Epicor ERP BAQs and External BAQs—most notably, multidimensional cubes created in Microsoft SQL Server Analysis Services. This allows the EDD BI Dashboard feature to be populated with both Epicor ERP and external data sources with shared dimensions and cross filters. EDD Advanced also allows EDD log-ins to be set up outside of the ERP system—via Azure Active Directory or local Active Directory—with data-level security set by role—an example of data-level security is a sales rep who will see only their sales territories. Epicor ERP users can still log in to EDD via Epicor ERP log-in. Administrators can limit users' capability to print and export data discovery views by using the Print claim and Export Data as CSV claim on the Edit Role page.
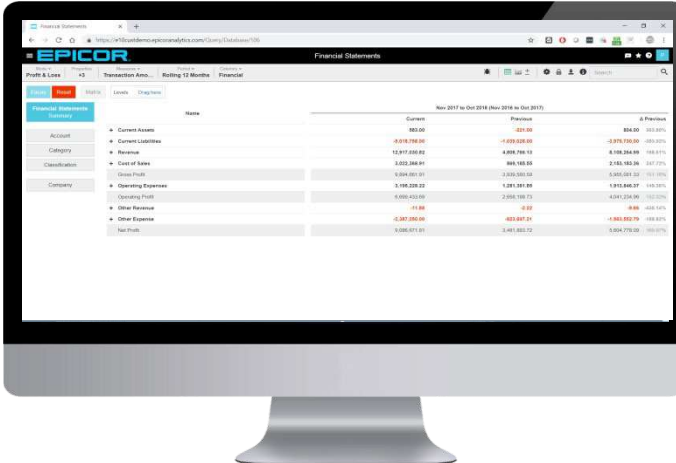
EDD Licenses

EDD Core functions are included in the Core packages of Epicor ERP Versions 10.2.100. EDD Basic—which allows customers who create their own BAQs to attach them to EDD and create visualizations—was also included in the Core packages of Epicor ERP as a separate license that needed to be installed. With 10.2.300, EDD Basic is not a separate license, and it no longer requires installation. EDD Advanced is a separate subscription or license available for an additional charge.

Epicor Data Analytics Improvements

Epicor Data Analytics (EDA) is an easy-to-use solution that takes a unique, intuitive approach to lead you on a journey of discovery through large data sets contained in your data warehouse. Significant improvements have been made to the existing capabilities of EDA—including a new view for Finance. All EDA content packs are included with the EDA subscription. Content Pack enhancements include:

- ▶ Epicor Mattec®—or Epicor Advanced MES—Content Pack gives you the powerful metrics you need to improve production performance—including overall equipment effectiveness (OEE), run rates, scrap, yield, energy consumption, material consumption, and much more. Accurate, machine-related data helps you pinpoint critical issues, reduce waste, and improve quality and customer service.

- ▶ Sales Management Content Pack now includes the CRM Quote Pipeline database—allowing you to analyze the success of quote-to-order conversions, wins, losses, and quote status. It helps you better understand your company's sales and enables you to make informed decisions that will improve your sales process and grow your business.

- ▶ Materials Management Content Pack now offers enhanced Inventory databases to include a monthly snapshot of inventory information and Sales data. Also, users can create a monthly "snapshot" of inventory information. The following data was added to the inventory data—Extended Price, Total Cost, Net Sales, and Gross Margin.

- ▶ The new Financial Statements Content Pack contains a Financial Statements database with templates to get you started. The intent of the content is to allow stakeholders to better align financial metrics with operational metrics in an accounting format and integrate account-based streams with the usual EDA analysis tools. Example statements include a P&L Statement, Balance Sheet, Cash Flow, and Trial Balance.

Sales and Marketing Management

Epicor Commerce Connect—Dealer Network Portal

The new Dealer Network Portal is designed to transform your dealer experience and accelerate business growth. As our omnichannel commerce offerings continue to evolve beyond B2C and B2B to include the dealer experience, the Epicor Dealer Network Portal is an innovative enterprise solution designed for manufacturers who sell or service products through dealers. Powered by the industry-leading Epicor Commerce Connect (ECC) solution and tightly integrated with your Epicor ERP system, the Epicor Dealer Network Portal creates a modern, online experience for your dealers to rapidly configure, price, and quote orders, as well as manage service and warranty needs for your products.
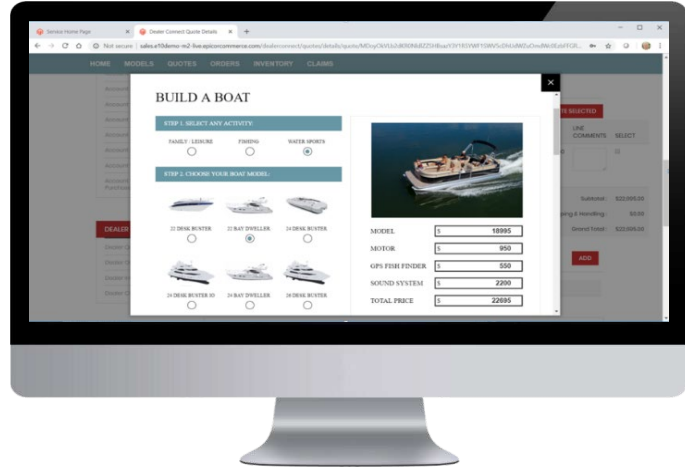
By capturing all dealer activity through a single, easy-to-use portal, you establish a single thread of data that connects all transactions at the dealer with your back-end ERP. You gain full visibility into the business, make it enjoyable for dealers to work with you, and drive business growth as the preferred, innovative brand.

Improve dealer recruitment, onboarding, retention, and satisfaction

Most dealers represent multiple products from different manufacturers, so you must differentiate your brand to win. The Epicor Dealer Network Portal helps your sales and service dealers deliver the modern experience they need to compete in the digital age. The solution helps you leverage automation for operational efficiency, integrate systems for access to real-time data, and deploy the latest eCommerce innovations for a best-practice, customer-centric approach. It fits a variety of dealer channel models—selling, supporting warranty and repair, tracking products after shipping, and even incorporating distributors into the channel.

By making it easy to do business with your organization, you compel dealers to position your brand over others. Ultimately, the Epicor Dealer Network Portal helps you improve dealer recruitment, onboarding, retention, and overall satisfaction to create a powerful competitive advantage that drives business growth.

Streamline orders

Provide your dealers with the ability to streamline the ordering process through a stunning, branded website that is fast and easy to use. With the Dealer Network Portal, sales professionals at your dealers can:

▶ Configure an order—from adding simple options, to highly configured products—depending on your manufacturing business model
▶ View predetermined, dealer-specific prices

- ▶ Add margins according to their unique business practices
- ▶ Create quotes for end customers
- ▶ Register sales and add customer buyer details for accurate purchase history

Simplify dealer service and warranty management

Offer service professionals at your dealers the ability to oversee quotes and orders to help close the sale, as well as manage warranties, spare parts, and service requests after the sale. The Epicor Dealer Network Portal allows service professionals at your dealers to:

- ▶ Review quotes and orders for account history and visibility
- ▶ Manage costs to the business
- ▶ Register your customers' buyer warranty information
- ▶ Place service requests and track status
- ▶ Search inventory and order spare parts based on the specific model of the product

Empower a branded experience

Showcase your brand to drive dealer and customer advocacy and loyalty. The Epicor Dealer Network Portal allows you to design the look and feel of your dealer portal however you prefer and according to your own brand standards.

Structure your dealer portal as a modern eCommerce website focused on convenience, ease of use, and performance. Leverage templates and tools to build and deliver a rich dealer experience throughout the life cycle—from the first customer visit, to service, and repeat purchases.

For Epicor ERP customers who leverage the Epicor Product Configurator, the Dealer Network Portal is tightly integrated for extended value. You will gain an enhanced user experience that elevates the configured order experience for greater accuracy and excellence.

The Epicor Dealer Network Portal allows you to design the look and feel data entry—reducing errors and overall operational costs. The Dealer Network Portal provides even greater value with cost-effective, cloud-based hosting and rapid implementation.

Get started today

It is now more achievable than ever to transform your dealer experience and accelerate business growth. The Epicor Dealer Network Portal is a powerful tool that increases order accuracy, reduces operational cost, offers new insights into your business, grows your dealer channel, and promotes customer loyalty.

The Epicor Commerce Connect Dealer Network Portal requires an additional license.

Epicor Mobile CRM Improvements

Epicor Mobile CRM empowers your sales team 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 order—anytime, anywhere. Now with Azure AD Authentication, it offers an even more seamless user experience.

Epicor Mobile CRM improvements expand the capabilities of sales to incorporate light sales order and shipment functionality. Not only will users be able to convert quotes to orders in the Epicor Mobile CRM solution, they will also be able to add new orders and edit existing orders—even enter the order comments. Additionally, to support onsite sales of value-added services, product, or even samples, the application also offers light shipping capabilities for those onsite sales opportunities. Other capabilities introduced include the ability to confirm stocking levels before taking an order.

To improve utilization of the sales team in your organization, we have expanded the capabilities of the GPS and map functionality to offer a view of the customers, prospects, or suspects within a given number of miles—or kilometers—of the user's current location. System settings are user definable and can be set based on your needs.

Some features that users missed from the CRM client include the ability to specify the sales category and tax category within a quote line and to setup default handling for taxes on the customer—including the Tax Liability and Tax Exempt status. Users can now specify a discount percentage at the quote level and can put a customer on credit hold.
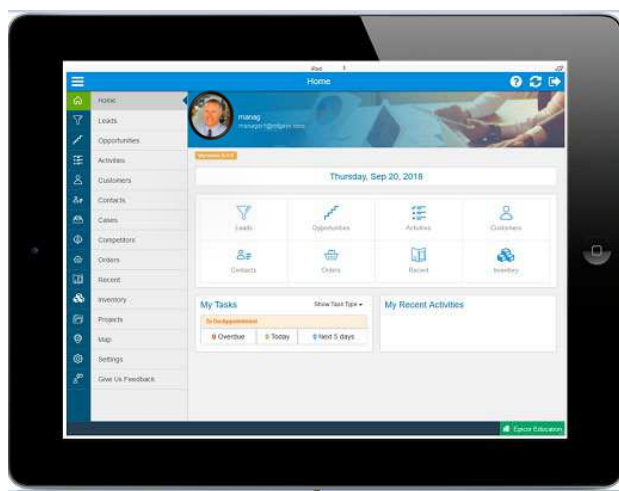
Note: With the release of sales order and shipment capabilities, please note that "office" licenses are consumed for these functions. The CRM license will not activate these capabilities, and if users will be processing or managing orders, an "office" license should be allocated.

Mobile CRM is available in the UK, New Zealand, and Australia—in addition to the Americas.

Customer Tracker Transaction History Range

Getting to the point faster with relevant data is achieved more easily with the latest feature in the customer tracker—Transaction History Range. A default setting in Company Configuration identifies the normal amount of data to pull in the tracker, and if users need to look further, they can modify the history range through this new setting in the Actions Menu.

Credit Card Processing Improvements

New features in Credit Card processing make it even easier to take the method of payment your customers want to use. The features are highlighted below.

- For businesses selling goods and services in multiple countries, the ability to take a credit card in the customer currency without penalty is an expectation. In addition to being able to take cards from multiple countries in the same Epicor ERP company, users can use a different merchant account per currency to eliminate the fees generated from processing credit cards in foreign currency. This capability is enabled through the Epicor Payment Gateway with connection to PayFlow Pro. Epicor Payment Exchange (EPX) and SDM are available for USD only.
- The ability to take a partial payment with a credit card is now available.
- More flexibility in use of credit cards by making it easier to remove the credit card flag on orders. This will enable shipments to still go out while the credit card transaction is confirmed.
- Test mode with the CRE gateway is now available to validate transactions prior to going live. This capability also includes logs.

Order Entry—Multi-Level Capable to Promise (CTP) for Kits

Multi-level Capable to Promise (CTP) has been expanded to accommodate multiple levels in a kit when calculating CTP dates. This feature is designed for Order Entry personnel who need the ability to perform multi-level CTP activities on kits in Order Entry. Also, users can use this capability to automatically generate jobs to fulfill kit components—making it even easier to manage kit ordering.

Product Configurator—Picture Box Input Rules

This new feature reduces the need for custom code in product configurations. Based on the option selected in a Combo Box input, the configurator will automatically change an image included on a Configurator Page without defining an Input On Field Validating event. Designed to make configuration more flexible and visible to the end user, this capability reduces the complexity in building and upgrading your configurations. Users can control multiple picture boxes in a single combo box or the picture box/combo box can be one-to-one.

Product Configurator—Allow Recycling of MRP Jobs

A new feature allows users to recycle MRP jobs for product configurations. It works well for configurations that don't include method or directive rules and that use input variables instead of outside tables. Much like with standard MRP parts, this should reduce the overall lead time for MRP.

Product Configurator—Image Layering

Image layers offer greater visualization during the configuration process. Users can define image layers (transparent images) which are used by the Configurator to build the image of the product being built as it is being configured by the end user. Simplifying the configuration process and providing greater clarity to end users is delivered via this visualization of the configured product.

Epicor Web Configurator (EWC)

Epicor now offers a native web configuration tool—the Epicor Web Configurator (EWC)—that utilizes the Kinectic design and framework. This solution is made available today to allow a Product Configurator customer to display their product configurator on the web with modern technologies—including HTML5, Typescript, and Angular. This is the first release with more to come in the furture of EWC and part of our ongoing strategy of transforming our

UX based on Kinetic design and framework. Please note that in order to do the customization, experienced programming skills will be required, and Epicor offers these services through our Professional Services team.

Configurator TypeScript Expressions

A leading language for web applications, TypeScript is now available when building product configurations in the EWC, which is used by the Epicor Dealer Network Portal capabilities of Epicor Commerce Connect—the eCommerce solution available for Epicor ERP.

Epicor Commerce Connect—Upload Part Image

For products that are Web Saleable, users can upload images to the part attributes tab where they will automatically be synchronized to the ECC image catalog. This greatly simplifies the implementation and ongoing updating needed to keep images current for your online presence.

Material Management

Dynamic Attribute(s) and Class

Users are now able to identify classifications of products with additional attributes. These attributes can be leveraged in building the structures of products and to define selections for the user. For example, color is an attribute, and based on the product selected, different values for color are available. Epicor Commerce Connect (ECC) customers can leverage this to display their products with additional attributes on the web storefront.

Package Control Identification (License Plating)—Full Expansion

We are excited to introduce the full capabilities of Package Control Identification (PCID) tracking to users for greater supply chain visibility, warehouse efficiency, and product traceability. In earlier releases, we offered the ability to create a PCID and ship it. With 10.2.300, users can do and see so much more.

Package Control functionality provides you with the ability to track, manage, or transact a group of items via a unique ID. This is useful for the medical device and aerospace industries, because it allows you to track any item throughout its journey to the customer. This higher level of traceability ensures both higher quality and tighter process control.
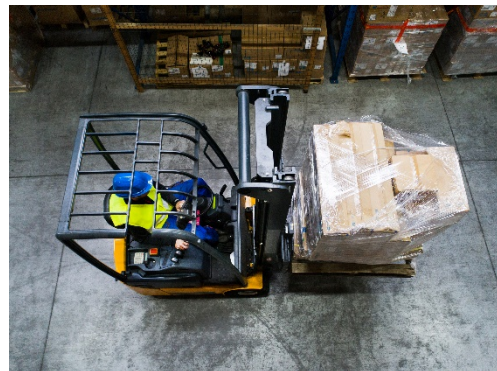
This ID also builds new levels of efficiency and accuracy in the warehouse as multiple items can be moved with a single scan rather than a scan for each item. The ID holds the product, lot, serial number, quantity, and location for everything associated with it. At the company level, it is called a Control ID. At the site level, this ID is called a Package Control ID or PCID. The Control ID is the unique identifier against which you place these transaction types. You can perform pick transactions, shipping transactions, and job receipt to inventory transactions—among

others—against a PCID. You have the ability to pick a sales order into PCID and ship a PCID. PCIDs can be single or multilevel with up to five levels of parent/child relationships. These PCIDs have an associated set of predetermined or user-defined physical characteristics. A PCID also has an associated set of predetermined or user-defined controlling characteristics.

The entity refers to the properties and contents—the package itself and its contents. Each entity can have its own identity and process life cycle. It has process flow, and status. Also, the entity can be either static—where the physical package can be reused once the contents have been shipped or disassembled—or dynamic—where the entity expires when the contents are discharged.

PCID functionality is throughout many different inventory processes. The PCID functionality in this release includes the following features:

Package Control ID Search

To easily search for and locate PCIDs, use the Package Control ID Search to search for and select PCIDs that match defined criteria. You can use advanced selection criteria to filter and sort search results for PCIDs.

Package Control ID Maintenance

View a PCID and its content, activities, packaging, labels, and customer container information. View the current status, prior status, and labeling specifications for a PCID. If a label is associated with a PCID, you can view the label's current status and attributes and reprint labels.

PCID Transaction Inclusion

- ▶ Receipt of PCID on a Purchase Order
- ▶ Issue Job Material
- ▶ Inventory Transfers
- ▶ Job Output by PCID
- ▶ Job Receipt to Inventory
- ▶ Material Request Queue
- ▶ Allow Allocations from Fulfillment Workbench
- ▶ Inventory Count
- ▶ Quantity Adjustments

Handheld PCID Programs

- ▶ Build PCID—Add parts and PCIDs from stock to a PCID
- ▶ Merge PCIDs—Move the full contents of one PCID to another PCID
- ▶ Split PCID to PCID—Remove a part or a child PCID from one PCID and move it to another PCID
- ▶ Split PCID to Stock—Remove a part or a child PCID from one PCID and move it to stock
- ▶ Package Return Adjust—Adjust returnable package container on-hand quantities—for a selected internal part, customer container part, or package code—in designated warehouse bins
- ▶ WIP PCID Receipt to Inventory—Assign WIP PCIDs generated from supply job output to an inventory warehouse and bin

Package Control ID Parent Child Tracker

View high-level information about selected PCIDs—including information about parent and child relationships, as well as current location and quantity.

PCID Contents Report

Display all parts and child PCIDs contained in PCIDs. You can choose to include both inventory and staged PCIDs in the report or just display only one or the other. You can also select to reprint PCID labels for the included PCIDs.

PCID functionality requires the AMM license.

Move Inventory Request—Need By Date

Move Inventory Request includes the Need By Date where you can specify a supply material date. The entered date is taken into consideration when processing a material request. For example, as a service technician, you need to know the material supply date.

Purchasing Unapproved PO and Unconfirmed PO Settings

Shipping and Receiving clerks need the ability to be warned or stopped when receiving a purchase order that is not approved or is not confirmed to ensure appropriate actions are taken internally to address the status of the purchase order. A new setting in Company Configuration allows the business to set the warnings and even stop shipment for these unapproved purchase orders.

Supplier Price List—Part and Subcontract Operation Attachments

Employees need the ability to add attachments directly to a part or subcontract operation in Supplier Price List so that users can view related information about the part or subcontract operation where needed.

Supplier Tracker Transaction History Range

Similar to Customer Tracker, Supplier Tracker offers a new Transaction History Range. A default setting in Company Configuration identifies the normal amount of data to pull into the tracker, and if users need to look further, they can modify the history range through the new setting in the Actions Menu.

Material Requirements Planning (MRP) and Generate Purchasing Suggestions New Log Types

In addition to the append option for managing logs, the latest release of Epicor ERP offers additional log types:

- ▶ The Overwrite type overwrites the log files during each run. This is the new default option.
- ▶ The Split type adds a date and time in the file name to create separate log files for each run.

Change Logs for Supply Chain Programs and Trackers

Change logs are now available for the following Supply Chain functions. To access the change log in any of the below programs, select the actions menu.

- ▶ Bill of Lading Entry
- ▶ Container Landed Cost Entry
- ▶ Container Landed Cost Tracker
- ▶ Container Receipt Entry
- ▶ Customer Shipment Entry
- ▶ Customer Shipment Tracker
- ▶ Demand Contract Entry
- ▶ Demand Entry
- ▶ Drop Shipment Entry
- ▶ Forecast Entry

- ▶ Master Pack Shipment Entry
- ▶ Miscellaneous Shipment Entry
- ▶ Miscellaneous Shipment Tracker
- ▶ Price List Maintenance
- ▶ Receipt Entry
- ▶ Tracker
- ▶ Receive Transfer Order
- ▶ Requisition Entry
- ▶ Tracker

- ▶ Receive Transfer Order
- ▶ Requisition Entry
- ▶ Requisition Tracker
- ▶ RFQ Entry
- ▶ Service Call Center
- ▶ Subcontractor Shipment Entry
- ▶ Subcontractor Shipment Tracker
- ▶ Transfer Order Entry
- ▶ Transfer Order Shipment Entry
- ▶ Transfer Order Shipment Tracker

Production Management

Handheld/MES Menu Security

This new application delivers greater granularity in setting up security for the plant floor and warehouse. When administrators define access for security roles in the new Handheld/MES Menu Security Maintenance app, those settings impact what programs an employee can access in the Handheld/MES Menu. You can use the MES Menu Security Report to display the menu items and/or employees associated with employee roles and PCID options.

Quality—Return Goods Repair and Return to Customer

Improving the workflow for returned goods reduces the complexity for these events and offers greater traceability through the quality system. Job Entry now includes a Return Goods Repair feature that is used to specify that a job needs to be shipped directly from WIP through Miscellaneous Shipment Entry when you close the job. The Return Goods Repair pane is located on the Job Entry Detail sheet and includes the RMA Line, RMA Number, DMR Number, and DMR Action Number fields used to review if a job is tied to an RMA or DMR records via the RMA Disposition Entry and DMR Processing programs.

The pane also includes the Misc Shipment from WIP check box. Checking the box allows you to synchronize a job with an RMA Disposition or DMR Number. Also, the Epicor ERP application automatically creates a Miscellaneous Shipment Pack ID with RMA Disposition information upon job closing or DMR information upon using the Return To Customer functionality.

DMR Processing lets you return items to customers. When you execute the Return To Customer for the failed material quantity on a DMR record, the application automatically creates a Miscellaneous Shipment Pack ID and DMR-SHP transaction type. This capability works on its own or with Epicor Field Service Automation (FSA)—if you have that module.

Service Management

Epicor Field Service Automation Integration Improvements

The integration between Epicor ERP and Epicor FSA 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. Integration Requesting Material—You can request more quantity for an item that is not in a vehicle, or you can increase the existing vehicle quantities. If you request additional items in Epicor FSA, Epicor ERP automatically creates a move inventory request that displays in the Material Request Queue. Note that you must install the Advanced Material Management license to process material move requests.

▶ Part Transaction History—The Part Transaction History Tracker references the Service Order Number and Service Order Resource Number that are tied to the inventory transfer executed in Epicor ERP. When you move inventory in Epicor FSA, you process it via the Material Request Queue in Epicor ERP. Once processed, the Service Order Number and Service Order

▶ Resource Number fields reference a service order and its resource tied to the inventory transfer in Epicor FSA.

▶ Service Contracts—Service contracts integration is now bidirectional. The current Service Contracts integration only flows from ERP to FSA when the contract is invoiced. The enhancement includes the ability to perform updates on existing contracts or for new contracts to be created by FSA users—Office or Mobile.

▶ Expenses—Field Technicians enter expenses in FSA Mobile and utilize all the standard functionality in ERP expense management. Expenses tied to a service call that should be billed to the customer, creates Purchasing Miscellaneous Charge post to the corresponding invoice line when the service call invoice is created. Since the Epicor FSA integration does not support multiple currencies, the Claim Amount is the same as the Expense Amount.

▶ Return Material Authorization/Disposition—This allows for equipment retrieval work orders to be processed in FSA and—with the completion of these work orders—creates an RMA record entered into ERP. Once in ERP, the RMA and DMR process will be followed. We've also added the ability to ship a returned item that has been fixed in a job in ERP directly from the job back to the customer based on the RMA through the Miscellaneous Shipment process.

▶ Company Setup—You can set up default Epicor FSA integration company settings that relate to Accounts Receivable, Expenses, Incoming Labor/Material, and RMA.
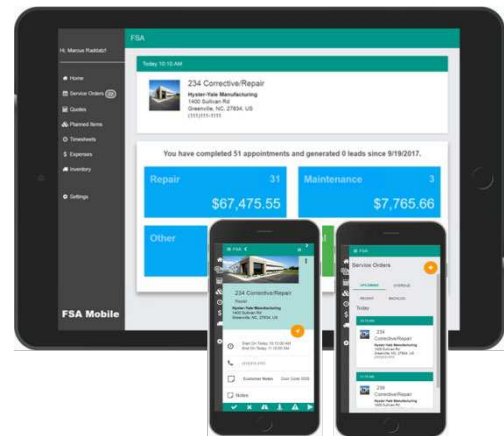
Financial Management

ACH Electronic Payments for Automated Payments and Collections

Automating the flow of cash between your bank and the banks of your key suppliers, employees, and customers has many benefits. It improves customer and supplier loyalty and keeps your employees happy—all while reducing wasted processes in collections and check writing. Eliminating the possibility of check fraud is another reason businesses prefer to perform electronic funds transfers (EFT) through ACH. ACH is available in the U.S. and Canada. Other countries support other formats and are not yet available through this capability.

ACH is not new to Epicor ERP, as it was known as an industry extension through the Epicor Custom Solutions Group (CSG) in previous versions. The new functionality described in this feature set—including the standard and Wells Fargo formats—is not licensed separately and is available to all users. Not only does this expand the scope of transactions to include customer receipts, but it also offers enhanced capabilities and makes it easier to stay current with Epicor. These capabilities include:

Standard ACH formats—domestic and international

The system includes standard ACH formats for both domestic and international transactions. This allows users to manage domestic customers and supplier transactions as well as customers and suppliers who are international.

Flexible customization of standard formats

Users can modify standard formats to meet the needs of individual banks without costly customization services.

Wells Fargo format supplied

The Wells Fargo bank format is also included alongside the standard format. Other banks are not supplied but are traditionally a version of the standard format.

Embedded financial transactions

This is available with Payroll Direct Deposit, AP Check Processing, and AR Cash Receipts for automated.

Multi-bank support for reduced currency costs

This capability is built into the Bank Management functionality and supports multiple banks for distribution to reduce translation costs. Users can have one bank for domestic transactions and another bank(s) for international transactions to reduce the cost of translating currency.

Simple transfer of funds

Once the system is setup, the user simply generates the file and uploads it to their bank—where the request or disbursement is done. The expense and time consuming project of printing checks, postmarking, and sending is eliminated.

Positive Pay

ACH Electronics Payments functionality works with the Positive Pay capabilities of Epicor ERP if that capability is licensed. Bank Positive Pay is an anti-fraud service offered by most U.S. banks. It protects companies against altered checks and counterfeit check fraud. Epicor Positive Pay provides the functionality needed to create a formatted file of accounts payable checks presented for payment against a list of checks previously authorized and issued by your company to the bank. This functionality supports Bank of Boston, Chase, Fleet, Union Bank, and Wells Fargo.

Automatic draft capabilities for customers

Electronically collect payments from your customers for either single-entry or recurring payments by directly debiting your customer's checking or saving accounts.

Employee direct deposits

More easily provide direct deposit via ACH for your employees. This capability includes the deposit of funds for payroll, employee expense reimbursement, government benefits, tax and other refunds, and annuities and interest payments. The Epicor ERP Payroll module allows you to export payroll data in files and send them to a bank to transfer payroll payments to employees. An output file can be in a standard simple text format or ACH format. The Standard simple text output file does not represent an interface directly used by banks—usually additional reformatting outside the ERP system is required to transform it to a file acceptable by a particular bank.

Supplier payments

Using the same process, reduce the effort and complexity in paying supplier bills with ACH for supplier payments. In the latest release of Epicor ERP, you will find easier setup of supplier ACH payments and added support to manage both domestic and international formats needed to communicate with international banks.

AR Remittance Slips

Improving communication with customers around their payments and allocations is mandatory in some geographies and a good business practice for others—especially for those doing ACH Automatic Cash Receipts from customers. Use the Print Remittance Slips command to print out remittance slips for all current payments— excluding deposit slips. The remittance includes their payment information and the details on how the payment was applied.

Partial AP Deductible Tax Processing

Greater control over deductibles for tax payments ensures tax payments match requirements without overpaying or paying too soon. When you set up a tax type in Tax Type Maintenance, the Default Tax Timing and Collection Method controls define when and how taxes are accounted for and are posted as committed tax transactions. You can also specify the deductible part of the tax when setting up the tax rate to use for the type. The AP Deductible percentage value may be defined when the Collection Method used is Invoicing and for all Default Tax Timing options such as on Invoice, on Partial Payment, and when the invoice is Fully Paid.

Automatic Matching of AP Payments and AR Payments for Select Countries

You can perform automatic matching of AR and AP payments based on reminder letter number and banking reference number. Matching based on banking reference number is applicable for the following countries—Belgium, Denmark, Estonia, Finland, Norway, Sweden, and Switzerland.

Auto creation of invoice cash receipts for select countries

You can automatically generate a cash receipt with allocated invoice based on reminder letter number and banking reference number. Auto creation of invoice cash receipts based on banking reference number is applicable for the following countries—Belgium, Denmark, Estonia, Finland, Norway, Sweden, and Switzerland.

General Ledger Report for Single Account

You can now use the General Ledger Report to display financial information for a single account. This may be useful for reviewing and reconciling journal details for control accounts that typically receive a lot of movement.

External Payroll Integration Improvements

New capabilities have been introduced to reduce the complexity of managing external payroll integrations. The following are included.

Column Title in export file—layout configuration

Use the Column Title of the Payroll Export Configuration Fields grid to specify the source field header to display in the export file.

Overtime Per Day threshold calculation for all employees

Use the Apply Per Day thresholds to All Frequencies check box in External Payroll Class Maintenance to determine if Overtime Per Day and Double Time Per Day thresholds will be applied to all employees in the payroll process.

Epicor HCM 2018

Epicor HCM has an exciting new release available that is designed to improve talent assessment, offer tighter control over absences, and now leverages the same powerful analytics tool—Epicor Data Analytics—used by Epicor ERP. Managing your most impactful resources—your employees—is easier with Epicor HCM 2018. Some of the features included in this release are:

- ▶ Employee Talent Assessment Tools
  - Employee 9-Box History
  - 9-Box Talent Matrix

- ▶ Epicor Data Analytics (EDA) for HCM Link Load Template Wizard
- ▶ Account Activation Security
- ▶ Employee Document Search
- ▶ Convert Row Security
- ▶ Absence Point System

- Absence Point Occurrence
- Absence Point System Configuration
- Absence Point Incident
- Absence Point Corrective Action

▶ User Driven Features
▶ SQL 2016 and 2017 Supported

ICE Framework and Tools

Stronger Security—SQL Security Error Reporting

Improving the security of the system is critical to ensuring systems aren't vulnerable to potential hacks. 10.2.300 has been modified so that error details returned from SQL Server are not transmitted back to the Client in error messages. This helps ensure that server internals and database definitions are not displayed to an end user—or potential hacker—when a malformed query is executed. The user is informed of any error, but no details from SQL are included. To troubleshoot any errors internally, the error details can be extracted from the application server log files.

System Monitor Reports

Additional sheets have been added to the System Monitor to allow display of more detailed information on reports and report actions—particularly for individual reports and emails managed via the Advanced Print Routing (APR) functions. The following information has been reorganized/added under the History sheet:

- ▶ Task Detail—Use this sheet to view task details for forms, processes, and reports
- ▶ Report Detail—Use this sheet to review the details of the report or the report partition split out via APR—this data is related to the task currently selected in the Task Detail sheet
- ▶ Report/Task Logs—Use this sheet to review further information—including specific APR actions—on the status of a task and any error messages that occur

Administration Console Offers Installations on Multiple Physical Servers

The Epicor Administration Console provides the ability to manage multiple Epicor server installations on multiple physical servers from a single interface. Previously, this was on a single server.

Enterprise Search Command Line Tool—Create Search Index

With the release of 10.2.300, Epicor is introducing a Command Line Tool for Enterprise Search. This is useful in creating a new search index. In particular, users can build scripts to automate this process. Search indexes are the catalogs of application data on which Enterprise Search performs its searches.

Advanced Print Routing Improvements

The latest release also provides enhancements to Advanced Print Routing (APR) for improved functionality and tracking of APR actions. Specifically, these capabilities include a new confirmation message to ensure routing is not accidental and more flexibility to email documents to multiple recipients—for example, all customer contacts. For easier confirmation of APR actions, the System Monitor History tab now includes sub-tabs that track reports generated by each Task and the APR actions for each report. Functionality has been added to allow values from parent tables of the APR Break table to be used for certain APR routing actions. APR actions can now be configured such that errors—i.e., a badly formed email address—do not result in failure of the entire routing. The metadata passed to DocStar can now be configured to include all values from a child table—for example, all Part numbers for the lines in a single Sales Order attachment.

Electronic Compliance Maintenance—Support XML Elements With Attribute and Value

Electronic Compliance file structure fully supports XML elements with both a value—bound data source value or constant value—and one or more XML attributes—with bound data source values or constant values.

Edit SSRS Reports—SSRS Report Design

The SSRS Report Design feature makes it easier to edit, preview, and deploy SSRS reports with the Epicor ERP solution. In particular, the preview capabilities from this solution will reduce design time considerably and simplify upgrades for users. Users editing reports will not have to execute the report each time in order to be able to view the output and the changes made. This feature set includes the following capabilities:

- ▶ New security role of SSRS Report Designer to ensure security of reporting
- ▶ "Design Mode" generation of reports and data
- ▶ Seamlessly download, edit, preview, and upload the report when customizing SSRS reports
- ▶ Edit and preview against "static data" until ready to "publish"
- ▶ Tightly integrated and optimized for Epicor ERP
- ▶ Preview in any of the supported formats when visualizing reports
- ▶ "Expressions" in the report definition now displays the field's name so it can be more easily positioned on the report
- ▶ Generate for design is also available for BAQ reports and Electronic Compliance Reports
- ▶ Compatibility with both on-premises and cloud deployments of Epicor ERP

Edit SSRS Reports—Enhanced Management for Report Labels

In the past, when adding a new table to a Report Data Definition, the default was to add all the fields and the field labels to the report by default—users would have to eliminate the fields they don't need to speed performance or reduce the number of labels in a report. This enhancement changes that methodology and reduces the work effort by having the user select the fields and labels from that table to use in the report.

To prevent reports from exceeding the column limit, validation rules limit the RDD Label Table to 1,020 columns when saving a modified report, and legacy reports will also have the number of Label Table columns limited to 1,020 when run.

Edit SSRS Reports—Replaceable Report Logos

Many businesses only update the standard Epicor ERP printed forms to put their business logo on them. Managing these forms from release to release can be difficult—if the base layout changes, you may have to modify your custom report definition. The good news is that with this new capability, you can specify your image for use on the standard forms, and you will not need to manage a custom report definition from release to release.

The standard image size is 2.409" wide and 0.533" tall.

This feature has been implemented on the following standard reports:

- ▶ Packing Slip

- ▶ Purchase Order
- ▶ Sales Order Acknowledgment
- ▶ AR Invoice
- ▶ Customer Statements
- ▶ Supplier Statements
- ▶ Reminder Letter
- ▶ Debit Memo

Security—Epicor Web Access HTTPS Support

Starting with Epicor ERP 10.2.300, Epicor Web Access only supports secure connections using the HTTPS scheme.

Security—Data Masking

Managing sensitive data is complex and costly for businesses. Whether masking data to support business and industry requirements or meeting compliance requirements such as the General Data Protection Regulation (GDPR), data masking allows you to restrict visibility to certain pieces of data while offering visibility to others within the Epicor ERP environment. This makes it easier to align sensitive data with ERP data. For fields that are text based, Security Managers can define a template that controls how the value will display for users who see the masked version—for example, a credit card number field could be configured to display as 1234*********678 for some users but display as completely unmasked for other users. Update capability can be allowed even for users who cannot view the data unmasked except during initial entry.

Data masking settings for the chosen fields are applied not only to the application forms, but also when the sensitive fields are displayed by BAQs. BPMs, however, use non-masked data, and users should take this into account when using Show Message, Raise Exception, and Send Email actions.

FIPS 140-2 Compliance for U.S. Customers Who Comply With ITAR

FIPS 140-2 is a government certification for encryption processing. To achieve certification, the authors of an encryption library must submit the library to NIST for an exhaustive testing exercise. Once certified, strict change controls are put in place to guarantee ongoing integrity of the library. Not all vendors send every encryption implementation to NIST for testing because of the overall expense and the subsequent change restrictions. As a result, most vendor platforms have multiple implementations of the same cryptographic function—some of which are FIPS certified and some of which are not certified but may be faster or easier to use.

Some Epicor customers—usually defense contractors or subcontractors—operate under the International Traffic in Arms Regulation (ITAR), which mandates certain operational controls. For example, all employees with access to technical data about the company's products or manufacturing methods must be U.S. citizens. ITAR also covers data processing requirements. A recent rule change now mandates that ITAR companies must process and store data using FIPS-compliant encryption. In other words, ITAR requires FIPS-compliant encryption of Epicor ERP data.

To accommodate FIPS-compliant encryption, a new runtime flag has been introduced that—when enabled in the web.config—forces all cryptographic operations in Epicor ERP and companion applications to use FIPS 140-2 certified libraries. FIPS compliance is only supported in the server and not in the client. For our cloud customers, with our standardization on Azure, we now offer "Epicor Government Cloud Option" for ITAR compliance.

Note: This rule may impact businesses differently in part as they might not be reviewing compliance until the next contract cycle with their trading partners or the government.

Improvements to Existing CSFs

Improvements have been made to the below CSFs in 10.2.300. See the feature summary for a complete list of features added to support these countries:

- Belgium
- India
- Denmark—including DanskeBank and Nordea used in Denmark, Finland, Norway, and Sweden
- China
- Colombia
- Estonia
- Finland
- Germany
- Malaysia

- Mexico
- Netherlands
- Norway
- Portugal
- Sweden
- Switzerland
- Taiwan
- Thailand
- Peru
- Singapore
- U.S. (1099)

Third-Party Applications and Integrations

As part of the Epicor ERP 10.2.300 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 10.2.300 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™, ConfigLink, 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 Phocus 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

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® 2017. 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 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 process of upgrading. The upgrade has been reimagined with automation and guidance tools for the entire process.

Upgrade program

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.
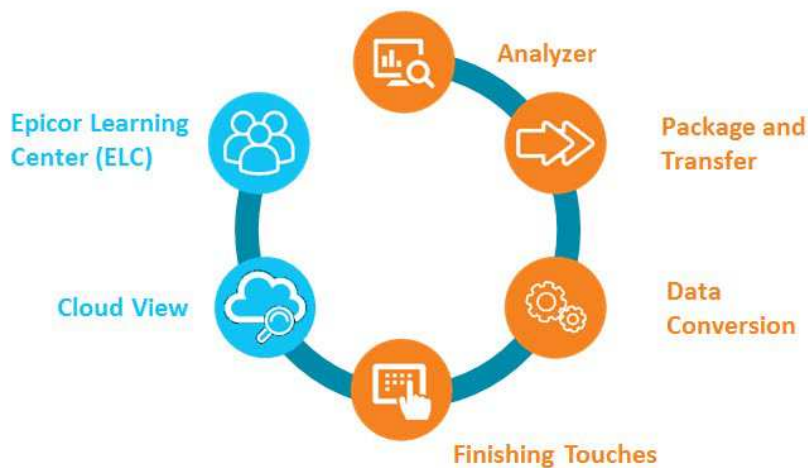
Upgrade Signature Methodology

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 process of upgrading has driven the need for a specific upgrade methodology to move 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, 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 to our current version, we have invested in cloud 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. Below is a matrix of availability of services as of the release of 10.2.300.

Analyzer

Package and Transfer

Data Conversion

Finishing Touches

Cloud View

Epicor Learning Center (ELC)

"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 in the upgrade process is to assess the volume of customizations, configurations, and data for your business. To simplify this step, 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.
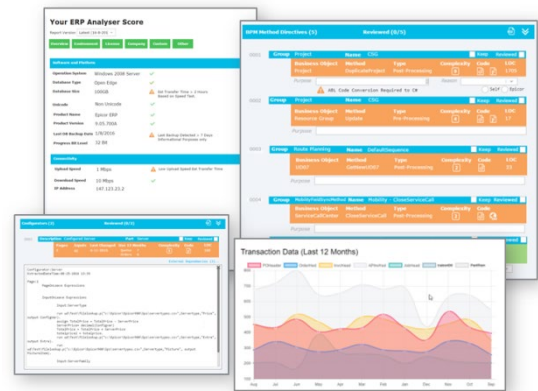
Packager/Transfer

Packager/Transfer is a simple-to-use, high-performing solution for packing up ERP data and transferring it safely 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 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 tooling for the rest of the upgrade. This process is very fast, as Epicor is able to leverage cloud resources. 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 said data. In the past, users would run 13 reports before updating their data, rerun them in the new environment, and compare the results. 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
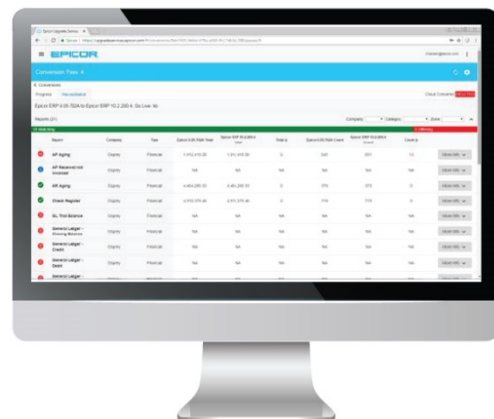
- ▶ Quote Detail
- ▶ Sales Order Backlog
- ▶ Scheduled Shipments

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 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, and 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 Upgrade Essentials Courses

Epicor University offers 75+ 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 or not 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	**Now Available**	Available	Available	**Now Available**	Available
Epicor ERP 10.2	Available		Check with your CAM*	Available		Available

*Customer Account Manager (CAM)

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 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.

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

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 an 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 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, 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 features/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.

Software Support Life Cycle

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 software support life cycle 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 Life Cycle Policy for more information.

We officially launched this policy with 10.2.100 and plan to transition services for users on releases in sustaining support with a phased approach. Below is an update by release on support stage along with transition details:

Product Release	Release Date	Support Stage	End/Transition Date	Notes
Epicor ERP 10.2.300	October 18, 2018	Active	Move to Sustaining October 18, 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	Active	Move to Sustaining May 15, 2019	
Epicor ERP 10.1.500	November 8, 2016	Active	Active Support extended through December 31, 2018	
Epicor ERP 10.1.400	December 17, 2015	Enhanced Sustaining	Limited development support* through December 31, 2018	Telephone support transition December 31, 2018—Additional module sales end December 31, 2018

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	

*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 December 2018. Customization and Implementation Services end when additional module sales end.

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 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 to the different learning styles and needs of your employees. The below graphic represents content that is new for our 10.2.300 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

Epicor ERP 10.2.300 Offerings

Knowledge on Demand

For quick answers to in-app questions, check out our Knowledge on Demand (KoD) videos—now built directly into your ERP solution. These short videos are between one to two minutes long and help you solve problems quickly. You can access KoD videos throughout the product, simply look for the Video Help icon directly on the program toolbar in various forms such as Job Entry and Job Tracker. We're adding new content all the time, so check back often. In this version, as well as prior versions, you may also access all KoD content directly via the KoD portal (see portal web address below).

Supply Chain and Manufacturing

- 10.2.300 Delta Education—Manufacturing and Supply Chain Management •
- What's New in Epicor ERP 10.2.300 •
- Understanding Package Code Functionality in Epicor ERP •
- Defining Control IDs for Package Codes •
- Creating PCID Labeling •
- Setting Up Dealer Portal in Epicor ERP •
- Defining Dealer Portal Options in Epicor ERP •
- Linking Dealer Portal with Epicor ERP •
- Creating Identification Numbers for Dealer Portal Parts •
- Designing Configurations for Dealer Portal Parts •
- Deploying Parts for Display in Dealer Portal •
- FSA Technical Reference Guide •
- FSA User Guide •
- FSA Integration Guide •
- Advanced Material Management •
- Handheld •
- Understanding the Supply Chain System Layout •
- Understanding the Manufacturing System Layout •

Tools

- 10.2.300 Delta Education—Tools Management •
- What's New in Epicor ERP 10.2.300 •
- Getting Started With the Active Home Page •
- Setting Up Security on the Active Home Page •
- Personalizing the Active Home Page •
- Using the Self-Paced Training Options for Epicor ERP •
- Exploring Help and Documentation Options in Epicor ERP •
- Epicor Data Discovery •
- Creating Runtime Views Using Epicor Data Discovery •
- Exploring Runtime Activity on the Home Page Through Epicor •
- Data Discovery •
- Refine Runtime Activity Views Through Epicor Data Discovery •
- Creating Dashboards with Epicor Data Discovery •
- Exploring the Advanced Edition of Epicor Data Discovery •
- Mobile CRM •
- Understanding the Executive System Layout •

- Training on Demand
- Embedded Education
- Documents and Release Guides

Finance

- 10.2.300 Delta Education—Financial Management •
- What's New in Epicor ERP 10.2.300 •
- Understanding the Financials System Layout •

Learning asset	Getting there
Epicor Learning Center	https://erpcustomer.epicor.com
Embedded Education	In Epicor ERP (license available from your customer account manager)
Knowledge on Demand	http://erpvideo.epicor.com/
Documentation	EpicWeb > Documentation

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.

EPICOR.