Epicor ERP 10.2.700

Release Guide

Forward-Looking Statements

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

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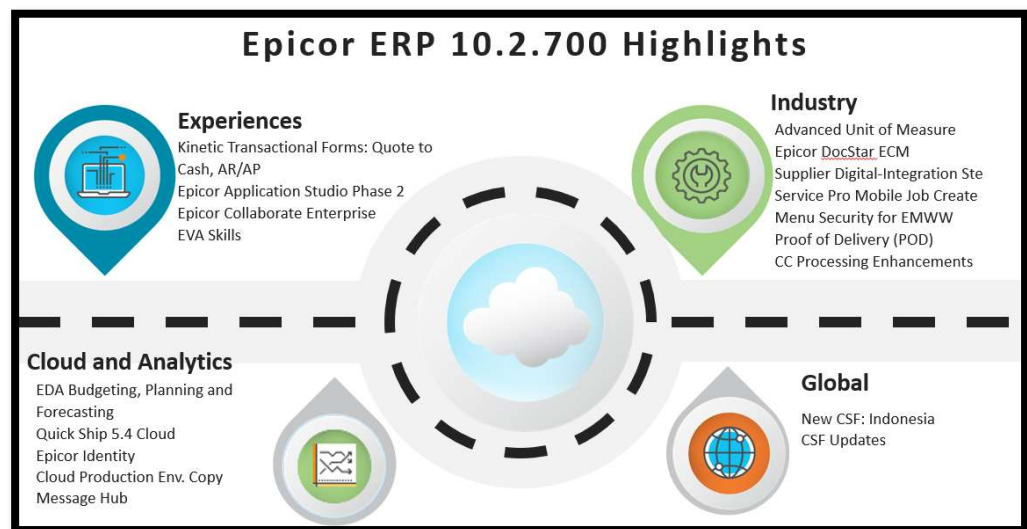
Executive Overview

High impact experiences create personal interactions, drive greater worker efficiency, and deliver on anywhere access to ERP. Modern User Experience is one of the core aspects of Epicor ERP 10.2.700 and it's delivered through the Kinetic UI. It is enterprise software delivered how you need it, resulting in a more productive and delightful experience for users.

Collaborate offers Enterprise-Wide collaboration, keeping your entire enterprise on the same page. Also, the design environment, Application Studio, continues to evolve to serve your needs in this release. Creating your own design experiences for Kinetic is easier in Application Studio.

In addition to evolving ERP with new experiences, Epicor ERP 10.2.700 delivers on easing the transition to the cloud with a Cloud Production Environment Copy that delivers the ability to have reporting access to your data in your chosen method. The Epicor Quick Ship solution becomes available in the Azure Cloud alongside your ERP solution and Epicor introduces for our cloud customers, Epicor Identity, which delivers a new level of cloud security and a single login to your entire Epicor experience including ERP, LMS, and DocStar ECM with more to come in the future.

Financial analytics continue to expand with EDA Budgeting, Planning, and Forecasting. For global businesses, many CSFs have been updated along with the introduction of a new country specific functionality, Indonesia.

Lastly, in Industry, a new module, Advanced Unit of Measure (UOM) offers greater simplicity for managing inventories in dual units of measure and segmenting by inventory attribute to find and account for inventory more easily. Epicor Mobile Wireless Warehouse introduced a new Proof of Delivery module, and the 1 Source EDI team from Epicor delivers an online Supplier Hub capability called Supplier Digital Integration Suite. More offerings include significant customer driven

Epicor ERP 10.2.700 Highlights

Experiences
Kinetic Transactional Forms: Quote to Cash, AR/AP
Epicor Application Studio Phase 2
Epicor Collaborate Enterprise
EVA Skills

Industry
Advanced Unit of Measure
Epicor DocStar ECM
Supplier Digital-Integration Ste
Service Pro Mobile Job Create
Menu Security for EMWW
Proof of Delivery (POD)
CC Processing Enhancements

Cloud and Analytics
EDA Budgeting, Planning and Forecasting
Quick Ship 5.4 Cloud
Epicor Identity
Cloud Production Env. Copy
Message Hub

Global
New CSF: Indonesia
CSF Updates

updates to enhance your satisfaction including Epicor DocStar, Service Pro, and Credit Card.

Upgrading to the latest release of Epicor ERP 10.2.700 gets your business an early start on the transition to Kinetic and delivers the technology needed to compete and thrive in the current business climate. Please know that you do not have to get to this exciting release, Epicor ERP 10.2.700, without help. The Epicor Services and Support organization is ready to assist your upgrade. Start the process by contacting your customer account manager. We look forward to hearing from you.

Availability Matrix

This briefing may contain features that are not released yet. Be advised that the delivery date for general availability for some features may change and projected functionality may not be included in the release. ERP deployment availability refers to whether the solution will be available for Epicor ERP users in the cloud or on premises. This is regardless of how the solution itself is deployed. Planned availability refers to the projected plan and is subject to change. See the Forward-Looking Statements section in the disclaimer. Each feature in the table below shows the projected date of planned availability.
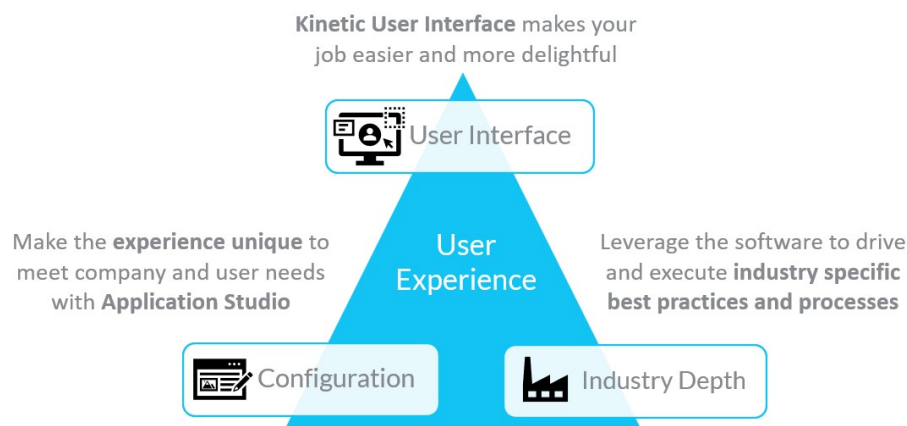
Feature	ERP deployment availability	Planned availability	Generally available
Kinetic Applications	Cloud, On premises	October 22, 2020	October 22, 2020
Epicor Application Studio	Cloud, On premises	October 22, 2020	October 22, 2020
Kinetic Preview Program	Cloud, On premises	Continued	
Epicor Collaborate Enterprise	Cloud, On premises	October 22, 2020	October 22, 2020
Epicor Collaborate Microsoft Teams (available in preview)	Cloud, On premises	TBD	
Epicor Virtual Agent (EVA) Enhancements	Cloud, On premises	October 22, 2020	October 22, 2020
Epicor ECM (DocStar) 10.2	Cloud, On Premises	October 22, 2020	October 22, 2020
Epicor Identify for Cloud	Cloud Only	October 22, 2020	October 22, 2020
Cloud Production Environment Copy	Cloud Only	October 22, 2020	October 22, 2020
Epicor Data Analytics (EDA) Enhancements	Cloud, On Premises	November 29, 2020	
Epicor Virtual Agent (EVA) Enhancements	Cloud, On premises	October 22, 2020	October 22, 2020
Epicor DocStar® ECM 20.2	Cloud, On premises	October 22, 2020	October 22, 2020
Epicor Commerce Connect (ECC) Enhancements	Cloud, On premises	October 29, 2020	
Epicor Advanced Unit of Measure	Cloud, On premises	October 29, 2020	
Proof of Delivery (POD)	Cloud, On premises	October 30, 2020	
Epicor Quick Ship 5.4	Cloud, On premises	October 30, 2020	
Supplier Digital-Integration Suite	Cloud, On premises	October 22 2020	October 22, 2020
Menu Security for Epicor Mfg Wireless Warehouse	Cloud, On premises	October 30 2020	
Advanced MES 8.3.1	Cloud, On premises	October 22 2020	October 22, 2020
Epicor Data Analytics (EDA) Budgeting and Forecasting	Cloud, On premises	October 22 2020	October 22, 2020
Financial Reports by EFP	Cloud, On premises	July 2020	July 2020
Epicor Cash Collect Cloud Updates	Cloud, On premises	Released in Cloud	Released
Epicor ERP Credit Card Processing Enhancements	Cloud, On premises	October 22 2020	October 22, 2020
Multicompany High Volume Transactions	Cloud, On premises	December 2020	
Use Bill To Customer Tax ID	Cloud, On premises	October 22 2020	October 22, 2020
Validate Customer and Supplier Tax IDs via VIES	Cloud, On premises	October 22 2020	October 22, 2020
Service Pro for Manufacturing (formerly Epicor Service Pro)	Cloud, On premises	October 22 2020	October 22, 2020
REST API Help Enhancements	Cloud, On premises	October 22 2020	October 22, 2020
HTTP Get Method Support	Cloud, On premises	October 22 2020	October 22, 2020
BPM Customization of Process, Report, and Simple Services	Cloud, On premises	October 22 2020	October 22, 2020
Cloud Storage for Documents – Map to Google Drive Folder	Cloud, On premises	October 22 2020	October 22, 2020
CSF Updates and New Indonesia CSF	Cloud, On premises	October 22 2020	October 22, 2020

General

Modern User Experience

The way we work is changing. The digital transformation has deeply impacted the workplace and user experience has become the main differentiator for enterprise solutions. Younger generations entering the workforce demand modern and intuitive applications at work that provide the consumer-grade experience they are used to. This past year has proven even more that mobility is also key for your employees, being able to work from anywhere, on the device of their choice.

Therefore, user experience is at the center of our solutions. We take a holistic approach at UX based on 3 pillars that together provide a modern and delightful user experience that goes beyond looks, streamlining critical business processes.

Kinetic User Interface makes your job easier and more delightful

User Interface

Make the **experience unique** to meet company and user needs with **Application Studio**

User Experience

Leverage the software to drive and execute **industry specific best practices and processes**

Configuration

Industry Depth

Kinetic delivers a modern user experience by extending technology to more users—beyond power users—through platforms, services, and applications. Through a user interface that it's easy to use and requires minimal training, with browser-based access that allows access so you can take your business everywhere, and a technology platform that facilitates industry innovation like IoT and AI, Epicor ERP is the future-ready solution that can allow your business to thrive today, and tomorrow.

Kinetic Applications

With 10.2.700 we are introducing Kinetic Transactional Forms, with a **Persona-based approach** that enables a smooth deployment for users. The first Personas are **Accounts Payable** and **Accounts Receivable Personas**, as well as primary **Quote to Cash** transaction and entry forms. We'll continue rolling out more at a fast apace with following release updates.

We are also continue releasing Reports and Processes, and Trackers for different areas including Financial, Material, Production, Sales and System Management.

Epicor Application Studio

Epicor Application Studio allows you to tailor the experience to meet your business needs. It offers a best practice approach at system configuration that is cloud friendly, upgrade resilient, and it's done in a low/no code environment.

With Epicor Application Studio you can tailor Kinetic applications without the complexity of changing code. You can create layers, add/change components, rules, and events through a visual designer with drag and drop functionality, and the ability to preview and validate changes before making them.

This release brings exciting new features that include:

- Application Studio Homepage so you can manage your tailored Kinetic Applications

- Ability to embed Data Discovery BI views and external Websites

- Reusable Component Design

- User Experience Improvements

Customer-Centric User Experience

We Listen to You

The valuable feedback that our customers provide through the different channels like the Kinetic Preview Program and the new In-app Feedback Button drives the prioritization of our work. We are actively listening and acting on many of the enhancements requested. With this release we are including:

- New Kinetic design color and theme
- Context Menu/Right Click
- Hot Keys and Keyboard Controls
- Full screen Panel Cards
- Grid Features: Export to Excel, paste insert grid data, freeze columns in grid, show summaries

Customer Resources

We continue running the Kinetic Preview Program as the main initiative to provide you with early access to new Kinetic applications and gather your input.

You will have the opportunity to test drive the next Personas we'll be targeting before they are generally available to all customers. If you would like to experience the benefits of our new user interface and get familiar with it, you can request access from your Customer Account Manager. For more information about the program, see the Epicor ERP Kinetic Customer FAQ on EpicWeb.

For existing customers we have created the [Kinetic Resources Site on EpicWeb](#) so you can get access to all related Kinetic materials in one place. Don't miss the [Getting Started With Epicor Kinetic User Guide](#), which includes recommendations on how to start the transition to ensure a smooth and easy adoption.

Epicor Collaborate Enterprise

In 10.2.500 Epicor introduced Epicor Collaborate, a modern workplace productivity tool built on a cloud platform. In the latest release of Epicor ERP, this solution expands to offer a rich toolset to offer enterprise-wide collaboration, greater support for MES with access from the Classic form and adds 22 new standard notifications.

Enterprise-wide Collaboration

Multisite, multi-company organizations need to communicate across boundaries to solve problems and remain responsive to customers. As a cloud-based solution, Epicor Collaborate delivers messaging capabilities for intercompany and inter-site conversations. Featured in this capability is the ability to create Enterprise groups that can span locations for greater business efficiency.

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

Epicor Social, an Epicor module with similar functionality for on-premises deployments, was retired at 10.2.600 and no longer available for use. Epicor Social moved to sustaining support at 10.2.500. Customers using this solution should plan their transition to Epicor Collaborate. When you transition, you can apply any unused maintenance for Epicor Social Advanced to your Epicor Collaborate SaaS subscription.
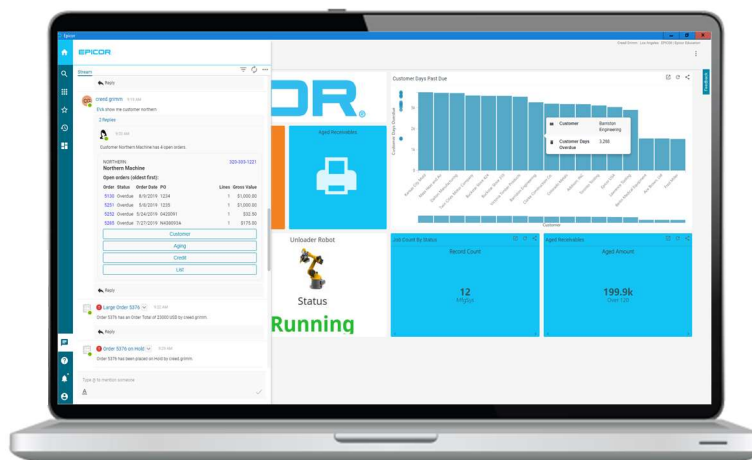
Epicor Virtual Agent (EVA) Enhancements

The EVA mobile application is a powerful, intelligent agent that uses context-aware natural language processing to help you achieve your tasks faster in Epicor ERP using voice or text commands on your mobile devices. EVA is available for iOS and Android–just search for "Epicor Virtual Agent" in the App Store or Google Play. Once the EVA app is activated for your company, you can also type in requests to @EVA in Epicor Collaborate. And in case you missed it, the EVA app remains **no charge** for you to use.

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

EVA benefits:

▶ Most users know how to use a conversational UI works on their devices, ensuring high acceptance and use
▶ EVA is context-aware so commands can be brief; EVA will understand what you mean based on what you said before
▶ Modern technology will help you attract and retain new talent
▶ Users can execute ERP actions anytime, anywhere with text or speech on their mobile devices; you can send your reps into the field with just their phones
▶ New employees quickly onboard, requiring little training in ERP
▶ EVA displays information cards in response to many requests, giving users the option to click buttons or keep talking or texting

EVA skills:

EVA has skills (voice or text commands) that can access parts, inventory, pricing, quotes, orders, purchase orders, and other customer and supplier information. Just launch the EVA app on your device, complete the secure ERP login, and start texting or talking. You can also ask EVA to take action based on information returned to you, such as creating a simple quote, converting a quote to an order, creating an RMA, or creating a PO.

The **10.2.700** release of EVA adds these new features

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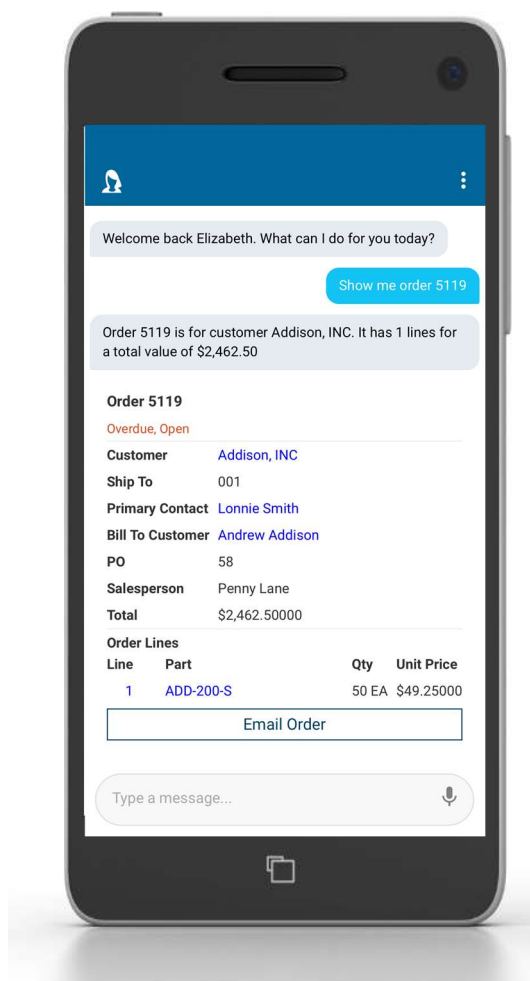
[1] "State of AI in the Enterprise, 2nd Edition" by Jeff Loucks, Tom Davenport, and David Schatsky, Deloitte Insights, 22 October 2018. https://www2.deloitte.com/insights/us/en/focus/cognitive-technologies/state-of-ai-and-intelligent-automation-in-business-survey.html

- ▶ **Email button** – After you have asked EVA to create a single-line quote, an RMA, or a single-line purchase order, an email button is available for you to send the form to your contact right then and there. You can also use information card functions to select a sales order or AR invoice and email those too.
- ▶ **Tasks skills** – As business processes become more complex and dynamic, any enterprise application needs to help keep the ball moving forward systematically, whether it is a sales opportunity or an engineering project. Task Management available within Epicor enables you to manage and automate even the most complex business processes—not to mention paving the way to ISO certification. New EVA skills let your users easily view and create tasks anywhere—at their desk or in the field—using voice or text commands, such as:

    - o "Display my schedule for today"
    - o "What are my current tasks"
    - o "Display upcoming tasks" (current week)
    - o "Display my outstanding tasks"
    - o **"**Create a new task"
    - o "Create a new task for [user ID]"
    - o "Create a task of [Task] for [user ID]"
    - o "Add a task of [Task] for [user ID]"
    - o "Add a task of [Task] with type [Type] for [user ID]"

- ▶ **Sales order skills** – Before, users could view a listing of sales orders in an information card for a customer. Now, they can go straight to a specific sales order and release line with a voice or text command. A new information card allows drill-down into a specific release line or you can do the same with a release line skill as shown in these examples:

    - o "Show me order y" (displays new information card with release line drill-down)
    - o "Display line x from order y"
    - o "Show me line x from order y"
    - o "List line x from order y"
    - o "Show line x" (when a sales order is in context of conversation)
    - o "Display line x" when a sales order is in context of conversation)
    - o "List line x" (In context of conversation of order)

EVA 2.0 Update on June 30, 2020:

EVA Natural Language Processing or NLP for short allows users to say their own words and EVA will understand them. For the EVA 2.0, release, Epicor developers generated over 4,000 test utterances to test EVA. As a result, the language understanding has improved 23% for Entities (from 62% to an 82% success rate) and 22% for Intents, (from a 68% to now a 90% success rate). If you already had the EVA app installed before June 30, be sure to update your app in the App Store or Google Play. And remember, if EVA is not understanding what you want to do, you can always refer to the Talk to EVA script card, or just say "EVA Help". Follow the EVA Install Guide (located on EpicWeb) so that your company can get started using EVA today.

Epicor ECM (DocStar) 20.2

Epicor ECM—also known as DocStar ECM—is an enterprise content management system that transforms your paper-based system into a fully digitized repository, with workflows to eliminate the waste and double-handling associated with paper and poorly maintained online folders, and help achieve ISO 9001 compliance. Named a leader in the Nucleus Research Content Management Technology Value Matrix 2020, the "Leader" placement reflects what the survey itself says so well:

This year, users reported similar priorities but with a greater focus on straightforward integrations with core business applications and scalability as value drivers…Users reported that their selection of a CM vendor is now based on the following:

- *Content integration into core business processes[1]*
- *Comprehensive security and records management[2]*
- *Flexible and hybrid deployments[3]*
- *Automated taxonomy[4]*

Epicor Notes on the Nucleus Research survey:

[1]Epicor ECM is the only enterprise content management suite with packaged workflows deeply integrated to Epicor ERP that capture, validate, route, and automate document processing for both accounts payable and sales order entry. Furthermore, the base product includes a workflow for file attachments that are drag-and-dropped into Epicor ERP to be automatically classified into the Epicor ECM repository.

[2]Epicor ECM granular permission settings in documents, inboxes, folders, workflows, and retention policies meet or exceed compliance requirements. An additional security feature unique in in the marketplace, Epicor ECM ValiDate™, examines a "digital fingerprint" each time a document is accessed to ensure it has not been tampered with. Also, see the "Epicor Identity Provider Integration" section below.

[3]Epicor ECM is available as an on-premises or cloud-deployed product

[4]Automated taxonomy is a concept, or compilation of best practices in how documents or other content is classified, indexed, and used by the business. The entire set of features in Epicor ECM comprises the tools to provide a level of automatic taxonomy.
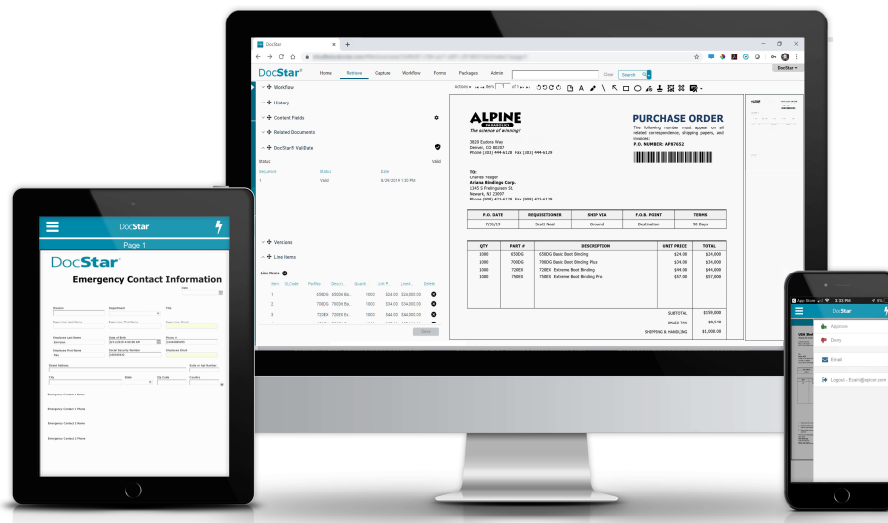
Epicor ECM 20.2 Customer Enhancement Requests

In planning Epicor ECM 20.2, we turned to our customers for their "betterizer" enhancement requests. ECM 20.2 includes 10+ major requests. Here are the highlights:

- ▶ **Tab and arrow support** for navigating line items – we have a lot of customers using AP Automation now and they requested this feature for their "keyboard warriors" who use shortcuts for everything
- ▶ Updates to **Accusoft ImageGear Toolkit** to extend support to **newer file-type versions**.
- ▶ **Image Stamps preview & resize** in the workflow designer

- ▶ **User Verify Field Group task** now supports **navigation** in document viewer – When you're looking for mismatches between lines vs. lines from an external system, instead of scrolling through hundreds of lines to find a mismatched line, a navigation button jumps directly there
- ▶ **PDF 2.0 Documents** can now be rendered – before, they could render with some success and now Epicor ECM provides full support
- ▶ Email Batch import now has **OAuth support for Google and Microsoft** – enables you to login to Google and Microsoft mail servers without storing credentials within Epicor ECM.
- ▶ Email Batch import now **supports Exchange Web Services (EWS)** – this new feature alleviates customer concerns about the deprecation of IMAP and POP3 support for Microsoft Exchange.
- ▶ Email Batch import now includes **attachment name metadata** – sometimes an attachment filename is the metadata, for example, an invoice attachment has the invoice number in the filename. Now when the attachment comes in, Epicor ECM will quickly capture the filename and do a lookup on it to populate data.
- ▶ **File Uploads** can now be **filtered** with inclusion or exclusion extension list – this can be determined on a company-by-company basis what types of files can be uploaded into Epicor ECM.
- ▶ **Workflow** Recording **Debugging Tool** – this will be really useful for Epicor Professional Services and Technical Support personnel, as well as advanced users who want to get insights on what a workflow is doing, for troubleshooting and performance improvement.
- ▶ **Solr** updated to 8.5.2 and **now uses OpenJDK** – Solr is the indexing engine used to make data quickly searchable. The update deprecates Java in favor of OpenJDK, thus resolving customer concerns about Java license restrictions.

Epicor Identity Provider (IdP) Integration

Multi-factor authentication has evolved as the single most effective control to prevent intruders from easily gaining an initial foothold into your organization, even if a user's password becomes compromised. When a user logs into Epicor ECM, two-factor authentication enabled by Epicor IdP sends a numeric code to the user's phone which they then enter in the login screen to gain access. *NOTE: Multi-factor authentication was released in ECM 20.1 last May in anticipation of the release of IdP. Please see the Epicor Identity section in this Release Guide for more information.*
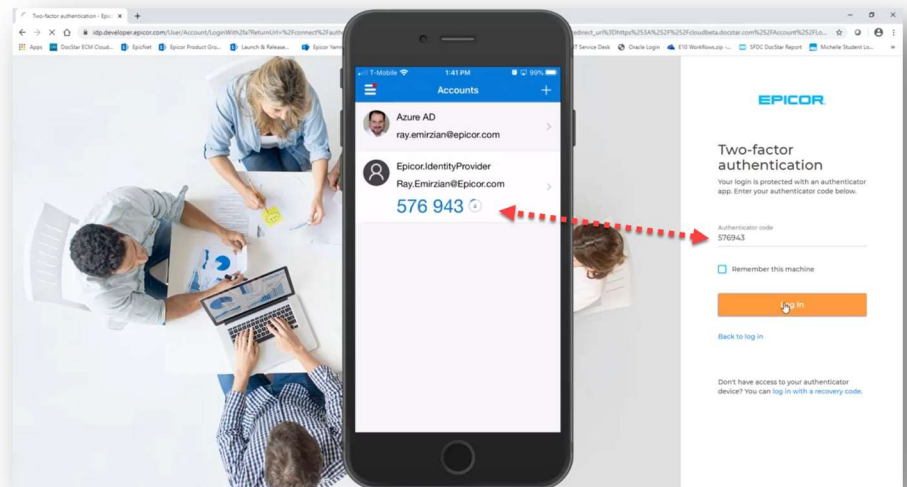
Cloud

Epicor Identity for Cloud

Epicor Identity is a new, included, modern security service that provides customers with centralized identity management and multi-factor authentication for all users accessing Epicor ERP, Epicor Learning Center, and Epicor DocStar ECM.

Although it is available with your Epicor ERP Cloud service, your system administrator must request-or opt in-to Epicor Identity as part of your upgrade to Epicor ERP 10.2.700. This gives you ample time to communicate to your daily users about the upcoming change to their login process.

Please submit an EpicCare ticket when you are ready to use Epicor Identity.

Cloud Production Environment Copy

Accessing data within Epicor ERP has long been considered a key business benefit. Technology leaders and system administrators drive significant value by expertly leveraging ERP data to better understand the business, drive efficiencies, and identify growth opportunities.

The Epicor ERP Cloud Production Environment Copy provides customers with read-only access to the database via ODBC or by using Azure Data Studio - a downloadable service available from Microsoft. This allows access data from your Epicor solution for further analysis with common business intelligence solutions like Microsoft Excel, Microsoft Power BI, or Tableau.

In order to protect system integrity in the cloud environment, there are safeguards in place that restrict certain confidential information and changes to the database such as creating views, modifying the structure, running updates against the database, or directly integrating to other applications. This offering is available only for the live Production environment. It is not supported for Pilot, Test, Embedded Education, or any other additional environments. For greater security, it is accessible only from a registered IP address via the provided user account.

Importantly, your Production environment already fully supports powerful configuration capabilities, including Epicor Functions, C# code, REST APIs, OData REST services, BAQ exports, and Epicor Data Migration Tool exports. Adding the Epicor ERP Cloud Production Environment Copy to your cloud services enables even more flexibility for leveraging your Epicor ERP data to drive business growth.

Additional subscription is required for this solution. For these details contact your customer account manager.

Sales and Marketing Management

Epicor Commerce Connect Enhancements

With the introduction of the new ECC Base offering, Epicor Commerce Connect (ECC) now has three offerings that offer choice and flexibility in selecting an eCommerce solution to match a manufacturer's digital online strategy. ECC Base has a standardized set of features such as primary/secondary site colors, banners, social media, headers, and footers to achieve predictable pricing and implementation lead times.

- **ECC Express** is a quick to implement and affordable B2B online customer portal with all the essential elements that allow businesses to immediately improve productivity, provide quality online experiences, and stay connected with their customers and suppliers.
- **ECC Base** is a complete package of B2B and B2C eCommerce functionality with a standardized set of site themes, features, and implementation hours for faster time to market and a favorable return on eCommerce investment.

▶ **ECC Advanced** is a highly customizable offering with a full feature set that allows your business to express your brand online and maximize your omnichannel eCommerce presence.

ECC Base Look and Feel Sample Screens

An additional subscription is required for this solution. For these details contact your customer account manager.

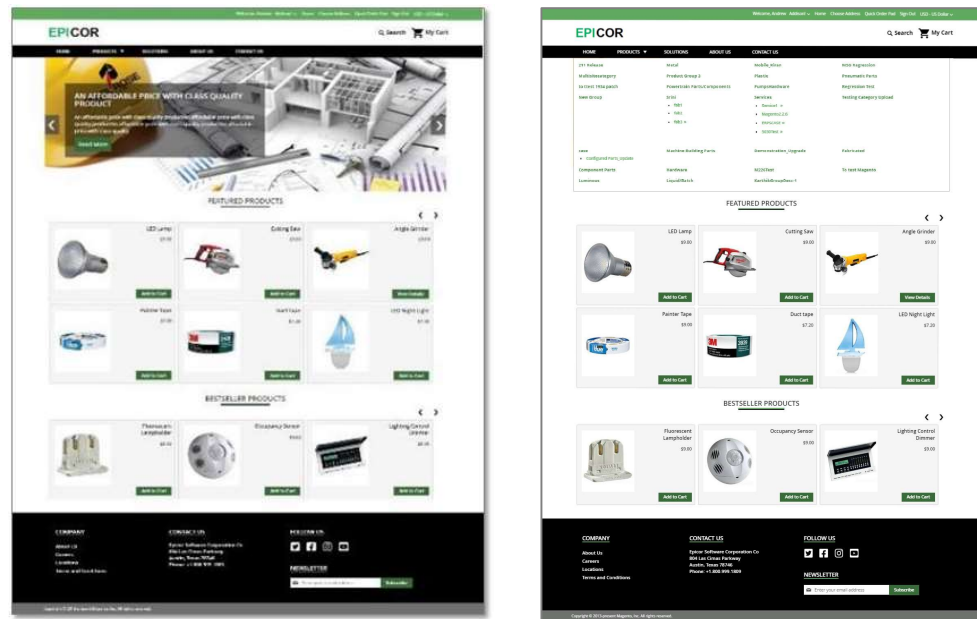ECC also has feature enhancements in this release to improve the end customer experience:

▶ Additional ERP Stock Status – additional product stock status information for eCommerce customers:
  o Discontinued products – items that are going to be cleared from stock or are / will no longer be available.
  o Non-Stock products – items that are not available in the store, but can be provided on-demand
  o Substitute products – items with the same or very similar properties as the original product.

▶ Elastic Search Enhancements – auto-suggest, autocorrection, recent searches, the ranking of search results, and popular searches.

Material Management

New Module: Advanced Unit of Measure

Global pressures to keep costs low and serve customers' needs on tight margins have challenged manufactures and distributers to further reduce the cost of carrying inventory without compromising on delivery. A key factor to success is the ability to most accurately cost and forecast inventory while easing the pain of quickly locating the right inventory to meet the needs of the customer or production. Not only does the Advanced Unit of Measure (UOM) module offer a transactional dual unit of measure, it supports the complex needs of managing inventories dimensionally.

Dual Unit of Measure (UOM)

Qty		
1	4x8 Sheet Stainless	161.28 weight
5	4x8 Sheet Stainless	806.40 weight

Attribute Tracking Stainless

Qty		
1	3x8 Sheet	12 gauge
3	4x8 Sheet	12 gauge
2	5x8 Sheet	14 gauge
5	6x8 Sheet	14 gauge
7	6x8 Sheet	16 gauge

Find	Sell	Plan	Purchase	Produce	Count	Ship

Many systems today can deliver this with complex implementations and ongoing time-consuming management of ERP. The benefit of Epicor Advanced UOM functionality is that it delivers a simplified approach to finding the right inventory by segmenting inventory with inventory attributes such as hardness, strength, modulus of elasticity, or density. Because the inventory is segmented, it is easily located, physical counts are more meaningful, and the business can plan inventory needs at the attribute level, ensuring accurate supply and demand are met.

Furthermore, Advanced UOM offers dynamic attributes to help businesses manage conversion between units of measure. For example, pounds or grams to feet, meters, or each. Both the theoretical size (4 meters length) and optional actual size (4.1 meters) can be converted to the accurate weight measures. This is powerful and useful in purchasing and selling in one unit of measure while managing inventory and production in another. Advanced UOM delivers these transactions in dual units of measure, giving greater visibility and accurate cost throughout with the simplicity of transacting in a number of pieces rather than counting out the weight or meters.

Cross-Industry Use

The functionality deployed in Advanced UOM can be used across many industries, not just metals but especially in metals where high-value inventory needs to be tracked more closely. Additional use cases include textiles, fabricated metals, landscaping (soil or gravel), packaging, furniture and fixtures, footwear, eyewear, sporting goods, and more.

Deeply Embedded in ERP

Advanced UOM offers deep capabilities across the entire ERP system including Quoting, Quantity Adjustments, Cycle Counting, MRP, Purchasing, Receiving, Material Queue, Part Tracker, Inventory Transfer, Material Issue, Job Receipt to Inventory, Salvage Receipt to Inventory, Available to Promise, Engineering, PCID, Order Fulfillment, Epicor Mobile Wireless Warehouse, and Customer Shipment Entry.

Attribute Sets

Easily set up and maintain sets of attributes across types of inventory to ease implementation and ongoing management of inventory dimensions. Attribute sets can be automatically or manually assigned to products in Quote Entry, Sales Order Entry, Purchase Order Entry, and Receipt Entry.

Replenishment by Attribute

Specify at the bin level replenishment goals for each attribute to ensure the on-hand availability of inventory. MRP then builds purchase suggestions to ensure the procurement of needed inventory.

MRP Planning with Attributes

Engineered products can be assigned specific attributes for semi-finished or finished goods. This is useful when applying value-added services. A bill of material for engineered products likewise can leverage materials with attributes. MRP accurately automates production based on demand and forecasts, ensuring material requirements with attributes are procured to meet the need.

Dual Units of Measure

Transact throughout ERP in two units of measure at the same time. Inventory Stock Status will demonstrate inventory availability by attribute in both units of measure. An example would be feet and pounds.

Cycle Count

More easily perform cycle counts by counting in whole units by attribute.

Additional license or subscription is required for this solution. For these details contact your customer account manager.

New Module: Proof of Delivery (POD)

Epicor Mfg Proof of Delivery (POD) is a mobile application that can be purchased separately as a stand-alone component of the Epicor Mfg Wireless Warehouse (formerly known as the Epicor Mobile Warehouse) application. It provides the capabilities for the delivery workforce to perform fast, accurate, and paperless deliveries. In addition to the existing paperless on-glass signature and photo capture capability, big changes for this release include delivery route optimization and delivery navigation to further improve driver productivity. Availability is for Android devices and is coming soon to iOS devices. Key Benefits include:

- ▶ Paperless capture of signatures and photographic proof of delivery
- ▶ Delivery Route Optimization
- ▶ Delivery Navigation with Google Maps Integration
- ▶ Real-time integration with the Epicor ERP platform
- ▶ Modern interface built on the Kinetic Design System
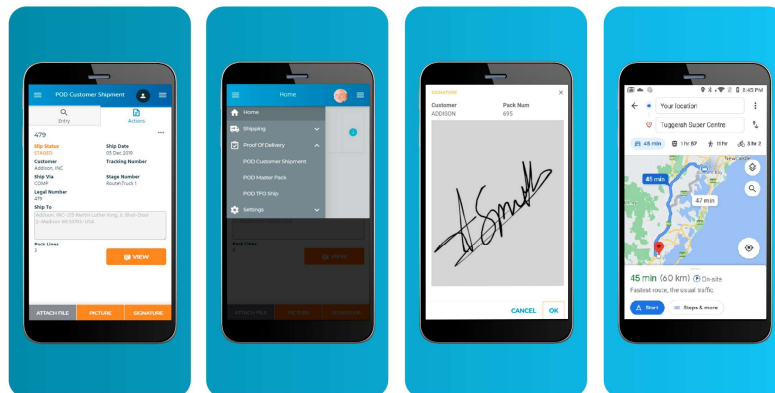
An additional subscription or license is required for this solution. For these details and to inquire about deployment for users, contact your customer account manager.

Epicor Quickship 5.4 Cloud

Epicor Quick Ship integrates seamlessly with your Epicor ERP platform to help you process shipping transactions quickly and efficiently. With this release, Epicor Quick Ship completes the transition to Azure Cloud.
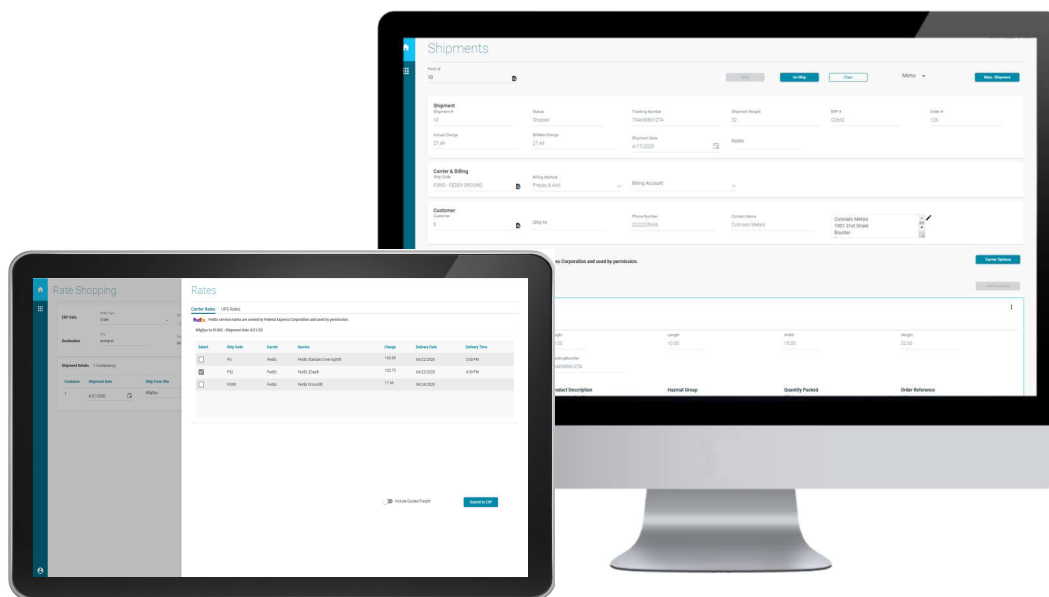
Some new features that are available with this release include:

- ▶ Bulk Shipping offers the capability to ship multiple pick tickets in one shipment
- ▶ Mass Shipping offers the capability to ship the same item to multiple addresses at one time
- ▶ Rate Shopping now includes the ability to select services available (e.g., accessorials) for a carrier and destination

Improvements for this release include:

- ▶ Carrier updates and services added to FedEx Cert, DHL, and Endicia
- ▶ Removal of LTL dependencies so that LTL modules no longer required for UPS and FedEx Freight
- ▶ Epicor Identity (IdP)
- ▶ New carrier integration for this release is Toll Parcel for Australia and New Zealand domestic shipments (these are two separate modules).

An additional subscription or license is required for this solution. For these details and to inquire about deployment for users, contact your customer account manager.

New Epicor 1 EDI Source Offering: Supplier Digital-Integration Suite

Cloud EDI and B2B Solution Places You at the Top of Your Digitized Supply Hub

On October 1, 2019, Epicor announced a new acquisition, 1 EDI Source, an industry-leading provider, and a 30-year veteran of EDI and B2B solutions. Some months later, 1 EDI Source rolled out an integration to the Epicor ERP EDI/Demand Management module, announced with the release of Epicor ERP 10.2.600. With the 10.2.700 release, we are announcing the Supplier Digital-Integration Suite (SDIS). This solution consolidates all your suppliers into a single, online hub. With their choice of web portal or direct integration to your system, no supplier is left out. The

result is integration with all your suppliers for alerts and real-time visibility into orders, carriers, and warehouses, giving your team the ability to respond to supply chain disruptions immediately.

Customer Benefits

▶ You can make real-time, data-driven supply decisions to respond to your customer more quickly and accurately
▶ You and your suppliers need no technical expertise—Epicor will recruit them to your digitized supply hub and manage and support the applications for you
▶ Your users can see B2B events in plain English, text message format, rather than struggling with "EDI speak"

Suppliers Benefits

▶ They can receive your purchase orders immediately
▶ They can submit an invoice faster and get paid faster
▶ They can be sure they are shipping the right product at the right time for customer satisfaction – the perfect order

Key Features

▶ All integration formats supported, including JSON, XML, REST API, flat file, ODBC, in addition to traditional EDI
▶ Connection to ERP, DMS, TMS, HMS, CRM, WMS, and more
▶ Suppliers can choose web portal access or direct integration to customer's back-office system
▶ Cloud subscription-based suite applications—paid by hub customer or customer/supplier shared payments
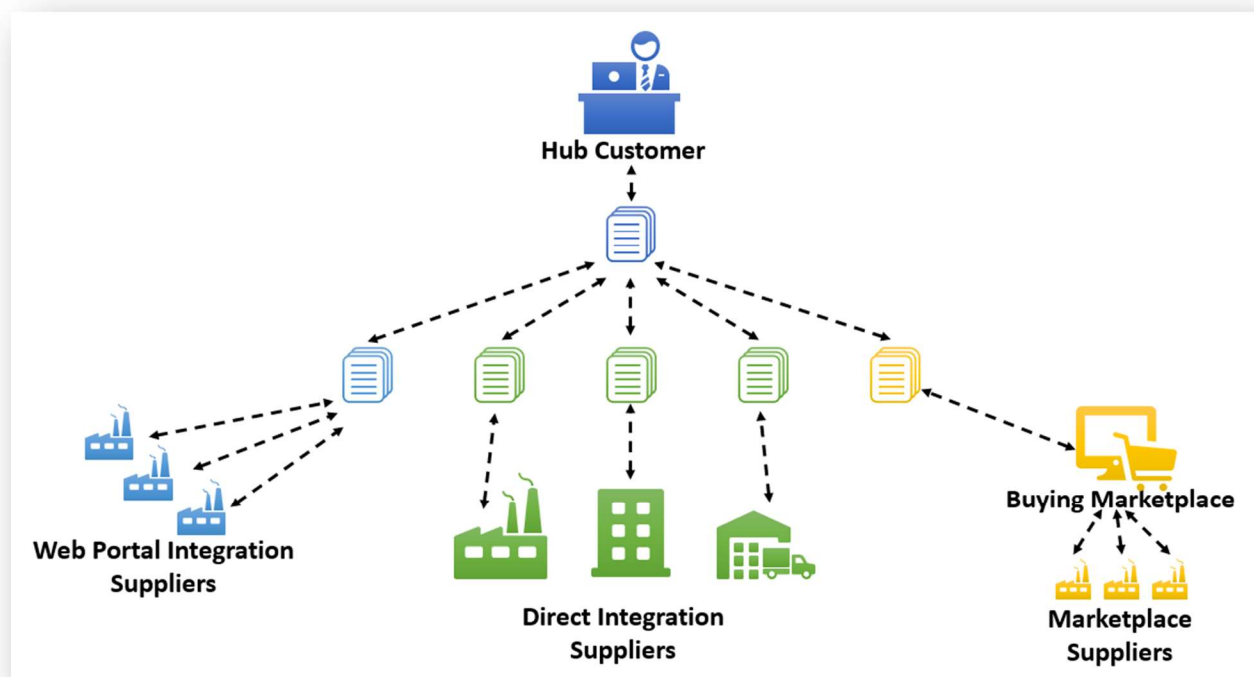
Note: Additional license or subscription is required for this solution. For these details contact your customer account manager.

Epicor Professional Services (PS) are required for integration between Supplier Digital-Integration Suite and Epicor ERP. Supplier Demand Schedules in the PS integration are not supported at this time, only single, standalone orders.

Menu Security for Epicor Mfg Wireless Warehouse

This enhancement allows System Administrators to assign security rights to selected predefined Employee Roles for users to access menu items within the Epicor Mfg Wireless Warehouse (EMWW). Currently, the only security access control for EMWW is at the Employee Role level which is a predefined/hardcoded security access.

Production Management

Epicor Advanced MES 8.3.1

Epicor Advanced MES is a critical part of any Smart Factory.   Epicor ERP manufacturers use Advanced MES to improve quality, reduce scrap, help ensure on-time delivery, and boost production throughput. It's all about improving production execution and performance efficiency to gain a competitive advantage. How do you make more without more assets? Uncover and eliminate downtime to make more parts or cut costs. MES can improve profitability by helping you find more capacity.

Epicor Advanced MES collects data directly from equipment and operators on the shop floor in real-time, minimizing inaccurate and time-consuming manual data collection. With information instantly in your hands, you can anticipate and solve production problems before they happen. Real-time insight helps you pinpoint critical issues, reduce waste, and improve quality and customer service. Everyone in the plant and throughout the business can take action to improve manufacturing performance.

Part Lot/Serial Traceability

The latest release of Advanced MES introduces material part traceability at the lot and serial number levels.   A New Serial Number User Interface on the HMI has been added to allow users to scrap parts by Serial Number and to Print/Reprint by part/shot.   The new screens include assorted filtering options to make the user experience even better.

Microsoft SQL Server Reporting Services (SSRS) Support

A new framework has been introduced in Epicor Advanced MES to support SSRS including the conversion to SSRS of several standard reports.

Machine Interface Unit (MIU) OS Upgrade

With our own IoT device, we call the Connected Factory Machine Interface Unit (CF-MIU) you can collect machine and process data in real-time and connect to virtually any machine without having to rely on equipment that is OPC compliant.   The Epicor Advanced MES Machine Interface Unit (MIU) is an industrial-strength data collection device conceived, developed, and manufactured by Epicor, and was designed along with the lines of a SCADA (Supervisory Control and Data Acquisition) system.   The term SCADA generally refers to a system which monitors machines, groups of machines, or large cells of manufacturing equipment. Much of the control is performed automatically by the MIU, however, there are host control functions that permit overriding this autonomous control through supervisory actions or intervention. For example, the MIU can control the output reject chute upon various conditions and processes, however, the MIU may permit the operator to make setpoint changes, enable/disable alarms, and adjust other parameters yielding other possible outcomes.   Its main purpose is to

collect production and process information from production equipment, store, and transmit that data in real-time to the server computer.   The MIU Can interface with OPC compliant PLC's and non-OPC PLC's on the factory floor, as well as read its own internal set of analog and digital inputs. The data acquisition begins here through vibration levels, meter readings, pressure, and temperature status readings, etc., which are then forwarded to the SCADA engine on the MIU.   Data is then compiled and formatted, and various reduction analysis equations are executed, and outputs are engaged if needed. In real-time, the operator can make supervisory decisions to adjust or override normal processes and procedural functions.

In Epicor Advanced MES version 8.3.1 the MIU operating system has been upgraded to Windows Embedded Compact 2013.   Windows Embedded Compact 2013 is an OS delivered by Microsoft for small-footprint devices that require flexible hardware and hard real-time support. With Compact 2013, Epicor can bring intelligent systems to market that stand out through attractive, intuitive user experiences and seamless connections to cloud services. This will allow us, for example, to send automatic software updates to MIU's running the latest MIU

EDA Energy Monitoring Content Pack

In the Epicor Advanced MES (Mattec) 8.3.1 release we are also pleased to announce an expansion to the Epicor Data Analytics (EDA) content pack to include Energy Monitoring.

An additional subscription or license is required for this solution. For these details and to inquire about deployment for users, contact your customer account manager.

Financial Management

Epicor Data Analytics (EDA) Budgeting and Forecasting

A completely new module is introduced in EDA for financial budget planning and forecasting. Keep track of your budget plans easily in the cloud, with a dynamic and user-friendly solution – from anywhere at any time, from any browsers.

A workflow-driven approach allows multiple stakeholders to co-operate online to submit, approve, or reject budgets – supported by commenting history.

Usual spreadsheet functions, different spread methods help with calculating budgeted values as well as the access to non-financial data in Epicor ERP or another database in EDA.

Interactive forecasting capabilities, combined with the budgeting sheets and actual values, allow business leaders to re-forecast estimates easily during the budget period or prepare a rolling forecast that can form the basis of the budgeting process in the next financial year.
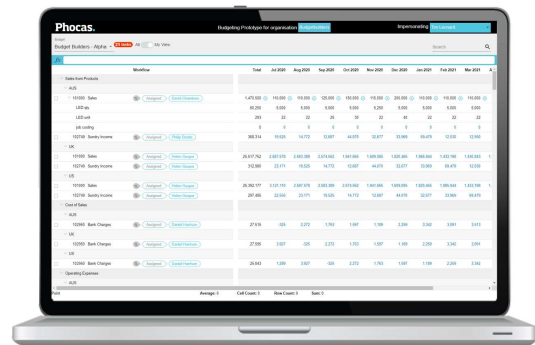
EDA and EDA Financial Statements are a prerequisite to use EDA Budgeting and Forecasting.

EDA Budgeting and Forecasting only runs in cloud-deployed EDA systems – that can be integrated with on-premises deployed Epicor ERP systems.

Additional license or subscription is required for this solution. For these details contact your customer account manager.

Financial Reports by EFP

Epicor Financial Planner (EFP) is a mature Excel connectivity solution for financial budget planning and analysis, featuring a web-based interface and an Excel add-in, offering multiple content packs.

The new light edition, Financial Reports by EFP, is introduced as a cost-effective solution to provide financial statements in the cloud. This entry-level version excludes the Excel add-in and the budget approval workflow, and runs only as a SaaS solution, both with a cloud and on-premises deployed Epicor ERP system. The built-in financial statement templates contribute to a quick and affordable implementation. It is possible to export financial statements and any reports in Excel format from EFP.

Financial Reports by EFP provide a capability to review GL journal details online, at anytime and anywhere, from any browsers. All reports and calculations are stored in the cloud.

All versions of EFP (including Financial Reports by EFP) include:

- A powerful automation engine with business rules that can drastically reduce time spent on monthly closing by automating repetitive tasks normally done in Excel (like automation of cash-flow or Pro-forma statements)

- A new subscription feature that automates the distribution of reports in Excel format to both licensed and unlicensed users. Distribution can be done on-demand or scheduled.

A new Functionality Matrix was issued for EFP providing a detailed comparison of the available editions and content packs.
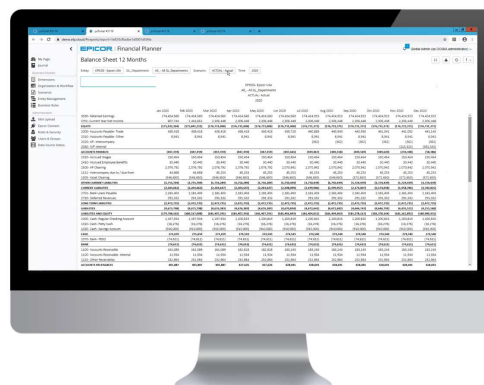
EPICOR Financial Planner 14 July 2020	SaaS Financial Reports by EFP	SaaS EFP BASIC	SaaS EFP STANDARD	SaaS EFP THE WORKS	On-Prem EFP MID	On-Prem EFP MAX
Features and Limitations by Plan						
Financials - All the Basic FP&A features						
Financials Budgeting	NO	YES	YES	YES	YES	YES
Native Excel Financials Reporting	Not available	Standard	Advanced	Advanced	Advanced	Advanced
Web Financials Reporting	Standard	Standard	Standard	Standard	Basic	Basic
Download Web reports into Excel	YES	YES	YES	YES		
Cash Flow automation	YES	YES	YES	YES	YES	YES
Drill Down to Financial transactions	YES	YES	YES	YES	-	-
General Ledger Connection	YES	YES	YES	YES	YES	YES
Book Publisher for distributing Excel/ PDF reports	-	-	YES	YES	YES	YES
Text Comments (Budgets and Reports)	Not available	Basic	Advanced	Advanced	Advanced	Advanced
Server based Business Rules Automation	YES	YES	YES	YES	YES	YES
Budget Workflow	Not available	Advanced	Advanced	Advanced	Basic	Basic
Multi-level approval	Not available	YES	YES	YES	2 levels	2 levels
Security and organization setup	Advanced	Advanced	Advanced	Advanced	Standard	Standard
Scenario management	Advanced	Advanced	Advanced	Advanced	Standard	Standard
User Management	Standard	Standard	Standard	Standard	Basic	Basic

As regards other EFP editions, a new optional item, the Microsoft Azure Data Connect was introduced to allow customers to utilize the EFP budgeting data in a Power BI or other Microsoft Azure-hosted environments.

Please note that starting from October 13, 2020, Microsoft does not support Excel 2010. *Additional license or subscription is required for this solution. For these details contact your customer account manager.*

Epicor Cash Collect

Epicor Cash Collect is a fully cloud-based, add-on product, with a web-based interface, that provides an efficient solution for automating your AR collections. With the release of Epicor ERP 10.2.700, it introduces a series of new features as well as a renewed look and design.

The new homepage shows the Next Best Activity which is a consolidated set of open activities organized by priority. The new navigation bar on the left provides faster access for activities and accounts. The favorites list on the menu are the pages that you use the most. Toggle an item by clicking on the new star button on the top of each page. The visual appearance, the style of icons and fonts were updated to provide better readability and visibility. Chat with product developers directly from the application window. Search for knowledge base articles and help or check the system status while staying within the application.
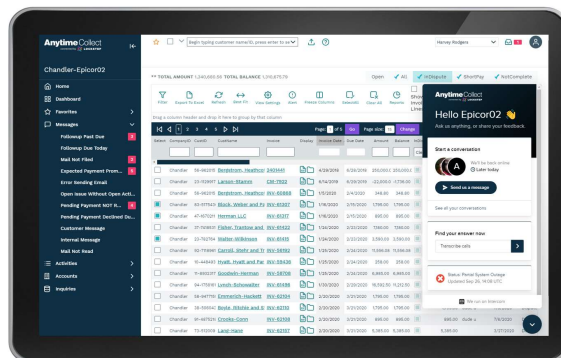
The Dashboard was updated with Projected Cash Receipts and Team Activities. The usage reporting lets a company monitor how many customers use Epicor Cash Collect for access and payment.

Epicor Cash Collect is now integrated with Salesforce to provide aging information at the account level. Now an account manager or salesperson can easily view the status of their accounts. Activities associated with collections are available in Salesforce as well to provide insight into the resolution of open issues.

Additional subscription is required for this solution. For these details contact your customer account manager.

Epicor ERP Credit Card Processing Enhancements

The Epicor ERP Credit Card Processing module was further enhanced in this release, focusing on usability and user experience. New features include:

- The ability to identify the site where the credit card transaction was generated

- The remittance slip shows credit card details

- Customers can use multiple credit cards at a single sales transaction

These features were released as part of the optional Epicor ERP Credit Card Processing module, and do not require any additional license.

Multicompany High Volume Transactions

Customers having the Multi-Site Management License, that allows them to use Epicor ERP with multiple companies and databases, may have encountered technical problems that caused the System Agent to crash. It occurred in certain environments with more than 50 companies. This data management issue is fixed and the system performance is improved. The fix is expected to be released in a later update i.e. Epicor ERP 10.2.700.4 or 10.2.700.5.

Use Bill To Customer Tax ID

The Sales List report is now able to use the Bill To Customer Tax ID from the AR invoice header, not only the Ship-To Tax ID from the AR invoice lines. The Sales List report prints an aggregated list of sales transactions per country and VAT registration number (Tax ID). The new behavior is controlled by a checkbox in the Company Configuration for AR.

Validate Customer and Supplier Tax IDs via VIES

VAT is the acronym for Value Added Tax, mostly used in the European Union. VIES stands for the VAT Information Exchange System, operated by the European Union Commission to validate VAT identification numbers (Tax IDs) of businesses registered in the EU for cross-border transactions on goods and services.

If you have any trading partners in the EU, this functionality will allow you to verify their Tax ID directly from Epicor ERP either manually or automatically at the time of each new entry.

Mass Tax ID validation is also available as part of this new feature.

An Electronic Interface (EI) program is used to send the Tax ID of customers or suppliers in Epicor ERP to the VIES service.

It works only for customers or suppliers with an address in a country, that is marked as an EU member in the Epicor ERP Country Maintenance program. This functionality can be activated by a checkbox on a new tab introduced for the Tax ID Validation in the Company Configuration.
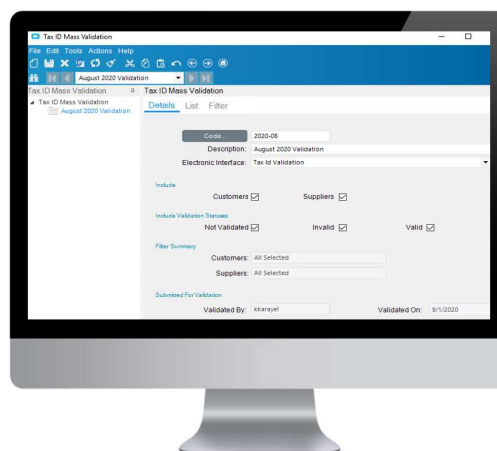
Service Management

Service Pro for Manufacturing - Mobile Job Creation

With this release, Epicor Service Pro is being rebranded to "Service Pro for Manufacturing". Mobile job creation also becomes available for Epicor ERP customers to improve productivity in their field service operations. This widely requested capability allows field service technicians to create orders out in the field from their mobile devices and have this be seamlessly integrated with Epicor ERP. This also helps technicians drive additional revenue and improve service per visit.

ICE Framework and Tools

REST API Help Enhancements

The interactive API help system is now delivered in the form of a Kinetic application. It provides a workspace to access controls from a single location to explore and test the available Epicor services.

HTTP GET Method Support

HTTP GET method is now supported for a subset of custom methods exposed by Epicor ERP services. HTTP GET supports entity tags (ETags) that enable caching of server calls. This approach significantly reduces the amount of data sent to the client and bandwidth costs for both Epicor Cloud and on-prem deployments.

BPM Customization of Process, Report, and Simple Services

The Business Process Management engine now supports customization of methods for Epicor services in the Proc, Rpt, and Lib namespaces. Previously, you could add custom logic to methods of the Epicor services that belong to the BO (Business Object) namespace. You can now create method directives for methods of other service types:

▶ Simple Service - This type includes the services that belong to the Lib namespace.
▶ Report (Service) - The services of this type belong to the Rpt namespace.
▶ Process (Service) - Process Services belong to the Proc namespace.

Cloud Storage for Documents – Map to Google Drive Folder

Cloud storage has become common for businesses looking to enable inexpensive, secure, untethered access to their business and product documentation. With the release of 10.2.600, Epicor Document Management (File Attachments) functionality expands to offer support for both Google Drive™ and Dropbox for document storage. In the latest release, 10.2.700, this has been expanded to offer the ability to define a shared folder for storing ERP attachments on Google Drive.

Note: This feature is available for both on-premises and cloud users.

Improvements to Existing CSFs

Several country-specific functionality (CSFs) packages are improved in 10.2.700:
▶ Australia

- o BPay Customer Reference and Cash Receipt File Import
- o BPay AP Export file generation

▶ European Union

- o Changes in EU Sales List
- o Validating Customer/Supplier Tax IDs via VIES

▶ India: eInvoice Reporting
▶ Indonesia: WHT Dashboard and Reports (New CSF)
▶ Mexico: DIOT and SAT XML schema updates
▶ Poland: Uplift the CSF Poland Package Phase 1 and 2 from 10.2.500 to 10.2.700
▶ Switzerland: ISO 20022 payment files - Credit transfers
▶ Taiwan: Tax declaration maintenance
▶ Thailand: Split WHT values automatic or manual method to capture additional service providers names and details
▶ USA: Form 1099-NEC for independent contractors & freelancers / 1099-MISC redesigned in 2020

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

Third-Party Applications and Integrations

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

Epicor 10.2.700 supports the following products:

▶ Epicor AgileShip Manifest from Agile Network, LLC
▶ eVision® from TIE Kinetix

- Epicor Precise Point of Sale from Precise Business Solutions
- Epicor Advanced Requisition Management from Precise Business Solutions
- CADink™, ConfigLink, Nest and ECN Manager from QBuild Software Corporation
- Epicor Product Life Cycle Management and Product Data Management from PROCAD GmbH & Co. KG
- Epicor XL Connect from Insight Software
- Epicor Cash Collect from Lockstep
- Epicor Financial Planner (EFP) from DSPanel AB
- Epicor Knowledge Mentor from SAP SE
- Epicor Data Analytics from Phocas Ltd
- Microsoft® SSRS from Microsoft Corporation
- Epicor Advanced Quality Management from IQS, Inc.
- AutoVue® from Oracle Corporation
- BarTender® from Seagull Scientific, Inc.
- SAP® Crystal Reports® from SAP SE
- Epicor Tax Connect from Avalara Inc.
- SmartForecasts® and Smart Inventory Planning and Optimization from Smart Software, Inc.
- ForecastPRO® for Epicor from Business Forecast Systems, Inc.
- XSOL InOrder from XSOL, Ltd.
- Workforce Now® from ADP, LLC
- Epicor Mobile Warehouse from Biscit, PTY LTD.
- Epicor Service Pro from MSI Data.
- Epicor Quality Management System (QMS) by ETQ, LLC

Compatibility

Epicor 10.2 has been tested on the latest releases from Microsoft—including Windows 10, Microsoft Internet Explorer® 11, Microsoft SQL Server® 2019, and Windows Server 2019. This version supports several browsers—including Mozilla Firefox®, Apple Safari®, and Google Chrome®.

In this release, Epicor officially drops support for Microsoft Office 2010, including Microsoft Excel 2010 which is used with various Epicor extensions.

For more compatibility information, see the Epicor ERP Hardware Sizing Guide on EpicWeb.

Sustaining and Retired Products

With the release of 10.2.700, Epicor will not be continuing to enhance several 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 10.2.700 release that is transitioning to sustaining support and/or are being retired. We will continue to support these products on earlier releases of Epicor ERP.

- There are no solutions to report movement to sustaining or retirement with this release.

Upgrading to 10.2

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

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

Upgrade program

To implement and upgrade your ERP software, the Epicor Signature Methodology is leveraged in every Epicor Professional Services engagement. Decades of successful software implementations and upgrades have refined the program—resulting in minimized risk, cost, and business disruption.
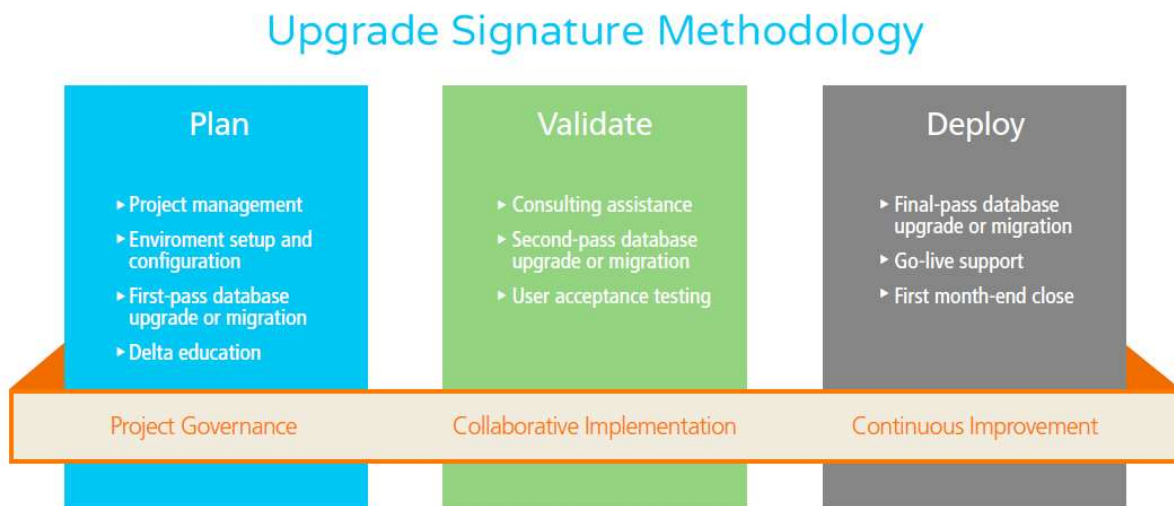
The upgrade process incorporates a methodology for moving to the latest Epicor ERP release. The upgrade program incorporates the elements from the upgrade Signature Methodology to provide the assistance your business may need—including technical consulting, modification services, reporting services, configurator services, EDI Services, Epicor University, and onsite business consulting.

Cloud upgrade tooling and services

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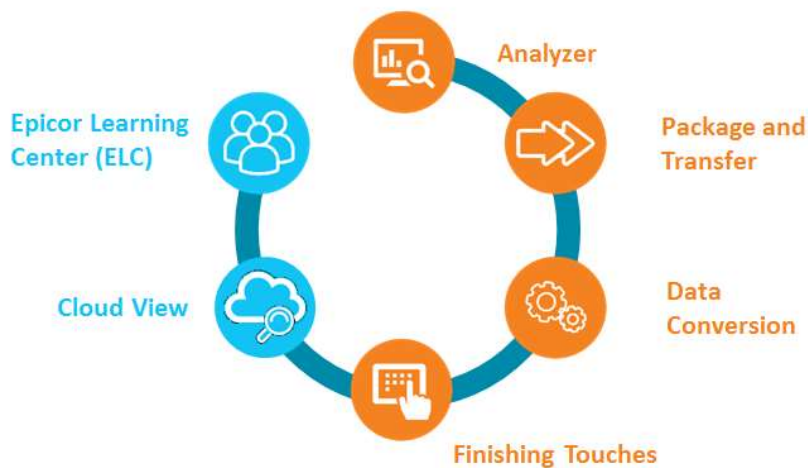
> "It's super simple and you can watch it while it converts. You can see what step it is on and any errors."
>
> Tim Ward, CIO
> Martin Automatic, Inc.

Analyzer

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


Packager/Transfer

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

Data upgrade

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

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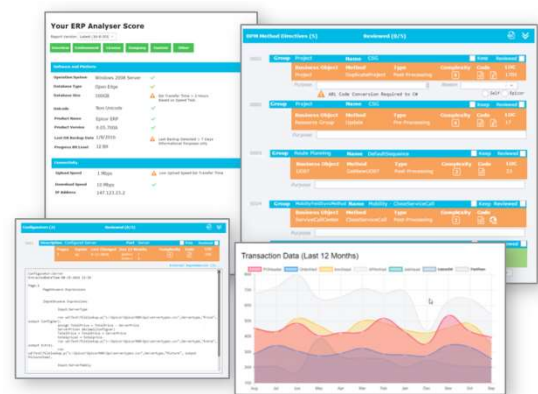
Reconciliation Reporting

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

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

Currently, Reconciliation Reporting is only available for Epicor ERP 9.05 users upgrading to the latest release of Epicor ERP.

Cloud View

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

Epicor Learning Center Upgrade Essentials courses

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

Cloud upgrade tooling and services availability

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

*Customer Account Manager

Migrating from Altec Advanced Print Management (APM)/APM+ to Epicor ECM (DocStar)

Epicor has seen great success in migrating Altec customers to Epicor ECM—also known as DocStar ECM—and we encourage all remaining Altec customers on Epicor ERP 10.2.400 and higher to move to Epicor ECM to take advantage of new features and help ensure business continuity. Epicor ECM is an Epicor owned product that will continue to be actively developed and enhanced for Epicor ERP going forward.

The basic migration path is as follows:

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

Note: Epicor ECM was first made available for Epicor ERP versions 10.1.600 and above. Some of these versions are also in Sustaining Support mode, and must be upgraded before sales of Epicor ECM modules are permitted.

For pricing details, contact your Customer Account Manager.

Epicor Support

Epicor stands behind all its products with an award-winning support organization capable of serving our global user base efficiently and effectively. With more than 45 years of experience supporting users, Epicor Support has a proven history in user satisfaction and increasing the value that they derive from our software. More than 600 support analysts with deep industry expertise have an average of six years of experience. These Epicor employees serve as customer advocates and are responsible for seeing cases from submission to resolution in 3019 languages across our 127 global support centers through the EpicCare support portal.

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

Application Support (for certified Epicor applications):

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

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

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

Hours of Availability

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

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

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

Advanced Support Tools

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

Online Support Center

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

Product Updates

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

Support Offering: Essential and Pro Support

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

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

With Epicor Essential Support all customers can access:

- Deep industry expertise supporting Epicor software and related technologies
- The award-winning EpicCare support portal
- Flexible support for cloud, on-premises, or hybrid solutions
- 100% Epicor employee support analysts
- Industry-leading response times for priority 1 cases
- Technology and feature advancements through upgrades or migrations to new Epicor platforms
- Epicor Ideas crowdsourcing workspace for product enhancements

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

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

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

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

Support Offering: ECC 24X7 Support

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

New Support Offering: Extended Support

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

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

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

Software Support Lifecycle

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

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

Product Release	Release Date	Support Stage	End/Transition Date
Epicor ERP 10.2.700	October 22, 2020	Active	Move to Sustaining October 22, 2022
Epicor ERP 10.2.600	May 21, 2020	Active	Move to Sustaining May 21, 2022
Epicor ERP 10.2.500	October 17, 2019	Active	Move to Sustaining October 17, 2021
Epicor ERP 10.2.400	May 16, 2019	Active	Move to Sustaining May 16, 2021
Epicor ERP 10.2.300	October 17, 2018	Sustaining	Currently in Sustaining

Epicor ERP 10.2.200	April 19, 2018	Sustaining	Currently in Sustaining
Epicor ERP 10.2.100	December 6, 2017	Sustaining	Currently in Sustaining
Epicor ERP 10.1.600	May 15, 2017	Sustaining	Currently in Sustaining
Epicor ERP 10.1.500	November 8, 2016	Sustaining	Currently in Sustaining
Epicor ERP 10.1.400	December 17, 2015	Sustaining	Currently in Sustaining
Epicor ERP 10.0.700 and earlier	August 4, 2014	Sustaining	Currently in Sustaining
Epicor 9.05.702 and earlier	June 12, 2013	Sustaining	Currently in Sustaining
Vantage/Vista 8.03.400 and earlier	July 9, 2012	Sustaining	Currently in Sustaining

User Groups

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

Epicor University

Epicor University provides learning tools, content, and training
opportunities that enable you to achieve your business goals. The suite
of tools available offers comprehensive training options that align with the different learning styles and needs of your employees, as well as in-product quick solutions that will deliver fast answers, allowing your team to stay focused and productive with the task at hand. The below graphic represents content that is new for our 10.2.700 release across our learning resources:

- ▶ Epicor Learning Center (ELC)
  - o Training on Demand video-based courses
  - o Role-based training agendas
  - o Course tests
- ▶ Embedded Education self-paced courses
- ▶ Release documentation
- ▶ In-Product Solutions
  - o Help and Support Panel
  - o Guided Learning
  - o Knowledge on Demand quick answer videos

EPICOR

Epicor Help and Support Panel

Integrated into the Kinetic Interface, the Epicor Help and Support Panel offers quick access to multiple resources, including help articles, videos, and Guided Learning topics that are specific to where you are and what you are doing.

Guided Learning: (*)

Using the concept of learn-as-you-go, Guided Learning steps you through a process in real-time—offering tips, tours and guidance along the way. A sample of Guided Learning flows follow, check out the Help and Support Panel for a full contextualized list:

- AP Invoice Tracker
- Close Cash Day
- Credit Card Type
- Earliest Apply Date
- Global Scheduling
- Inspection Attribute
- Payment Instrument
- PCID Generator
- Print Packing Slip/Labels
- Purchase Order Entry
- Recurring Cycle
- Reference Category Maintenance
- Relationship Class Maintenance
- Sales Region
- Shop Warning Maintenance
- Site Cost Maintenance
- Task Status
- Task
- Warehouse Bin Size Group Maintenance

Other:

- BPM Cookbook (10.2.700.5)

*Guided Learning Content will be available in 10.2.700.4

☐ Display Field Level Help

[Help and support center]

Epicor Learning Center

Training on Demand

Jump into Epicor Learning Center to review all of the Training on Demand courses. Check out a few of the over 15 new and updated titles below:

- What's New in 10.2.700
- Setting Up Advanced Unit of Measure
- Buying and Selling Quantities with Advanced Unit of Measure
- Producing Quantities with Advanced Unit of Measure
- Adding Widgets in the Application Studio
- Introducing the Application Studio (Update to existing course)
- Using Collaborate for Daily Tasks (Update to existing course)
- Starting a Workorder from Service Pro (Update to existing course)
- Migrating BPM Directives (Update to existing course)

Knowledge on Demand:

Access Knowledge on Demand from the Help and Support Panel or Help menu. These short, dynamic, one- or two-minute long videos provide fast answers to common questions and processes.

- Using the Application Studio Home Page
- Creating Sliding Panels in the Application Studio
- Activating Notification Rules in Collaborate
- Creating Enterprise Groups in Collaborate
- Accessing Collaborate Stream from MES
- Access to Licensing in Company Configuration
- Identifying Companies and Sites from the Home Page
- Adding Google Drive and Dropbox Attachments
- Posting EVA Messages to Collaborate
- Creating Tasks and Showing Task List from EVA
- Emailing Documents Directly from EVA

Embedded Education:

Embedded Education courses are woven into ELC's role-based training program. You will now access the 100+ courses from the new Help and Support Panel, by clicking the Help and support center button. Check out a few of the new titles below:

- Advanced Unit of Measure
- Epicor 10 Delta Education—Tools Management
- Epicor 10 Delta Education—Financial Management
- Epicor 10 Delta Education—Manufacturing and Supply Chain Management

About Epicor

Epicor Software Corporation drives business growth. We provide flexible, industry-specific software designed to fit the precise needs of our manufacturing, distribution, retail, and service industry customers. More than 45 years of experience with our customers' unique business processes and operational requirements are built into every solution—in the cloud or on premises. With this deep understanding of your industry, Epicor solutions dramatically improve performance and profitability while easing complexity so you can focus on growth. For more information, connect with Epicor or visit www.epicor.com.

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