

# Epicor ERP 10.2.400 Feature Highlights

Consolidated briefing  
paper for Epicor ERP 9.05  
users

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## Introduction

For Epicor ERP 9 users, upgrading to the latest release of Epicor ERP delivers new functionality designed to simplify workflow, reduce the pain of managing complex processes, and improve user satisfaction and experience with Epicor ERP.

Epicor ERP is architected 100% on a Microsoft platform, greatly simplifying the technology that enables Epicor ERP, and especially enabling it for cloud deployment. In addition, for all users, Epicor ERP introduces new technology advancements in Epicor IOT, Epicor Data Analytics, Epicor Mobile Access, Epicor Web Access, Epicor Social Enterprise, and a new Home Page designed in the Kinetic Design System for greater user adoption. For users, each role within the business benefits from new functionality in the release:

- ▶ ERP for the Accountant, Controller, CFO—Functionality to delight financially minded users includes Bank Statement Processing, AR Reconciliation Report and Tracker, ability to add attachments in GL Journal Entry, Periodic Consolidation Delta and Retrospective Adjustment, Multiple Budgets Support and Import/Export Capabilities, and Non-Financial Data Support.
- ▶ ERP for the Production Manager, COO—Improve productivity and user adoption in operations through BOM Allows Zero Quantity/Parent, Epicor IOT, various features to reduce steps in processing jobs in Job Entry, Approve and Check-in at EWB, and Manufacturing Execution System improvements.
- ▶ ERP for the Materials Manager, COO—More features for staff focused on management of inventories and movement of products within the organization include Planning Contracts; Calculate Minimum, Maximum, and Safety Stock; Purchase Suggestion and Purchase Release Visibility improvements; and Purchase Order Change Suggestion Entry—Arrived Qty, On Order Qty, Comments.
- ▶ ERP for the Sales Management, Estimator—The key feature for this group is a newly introduced commerce solution, Commerce Connect. Commerce Connect is designed with full B2B and B2C storefront capabilities with integration with Epicor Configurator. For a simplified deployment, users can leverage Commerce Connect for their customer portal or for a supplier portal.

Upgrade-ready ERP is designed to offer ease in upgrading so that users can more easily stay current with technology. To reduce the heavy lifting of the upgrade, Epicor has delivered cloud-enabled tooling and services that are designed to assist users and reduce the complexity of the upgrade project. Epicor ERP is ready for your upgrade project today.

# ERP for Everyone

## Active Home Page

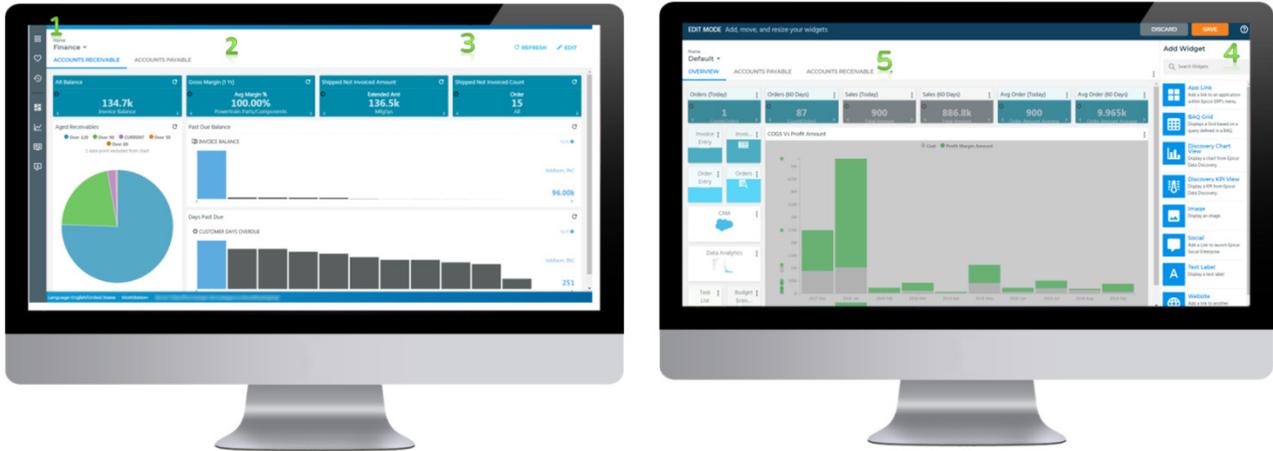
The Active Home Page is now optimized to offer a new level of experience for users. Built in the Epicor Kinetic Framework, the look and feel of the application has been designed to simplify and standardize the use of ERP. Standardizations that you will notice in the application include:



- ▶ 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

Discovery Dashboards – A collection of several views, leverage this widget to simultaneously compare a variety of data. If you have views that you use daily, add a dashboard to your Active Home Page that displays these views at once, rather than navigates between separate views

Discovery IoT Widget - Use this widget to view the status of IoT (Internet of Things) Devices. For more information about the IoT feature, refer to the Epicor IOT section

Web Applications - Hosts entire web applications, including kinetic-based applications, such as Manufacturing Execution System (MES) forms, scheduling boards, and other web applications

## Epicor Data Discovery (EDD)

Built to extend the existing Epicor dashboard capabilities, Epicor Data Discovery is part of the Epicor data platform that enables Epicor ERP users to access greater visualization and self-discovery tools for their existing and growing library of dashboards and BAQs. EDD is an analytics solution intended to provide an easy-to-use data exploration

and data visualization experience. EDD is a major component of the overall Epicor data platform, which encompasses a broad set of capabilities for managing, accessing, sharing, cleansing, visualizing, and extracting insights from data created by or related to Epicor-created data.

### Business focus

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

### Anywhere access and responsive design

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



### Self-serving data that's easy to use

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

### Data visualization types

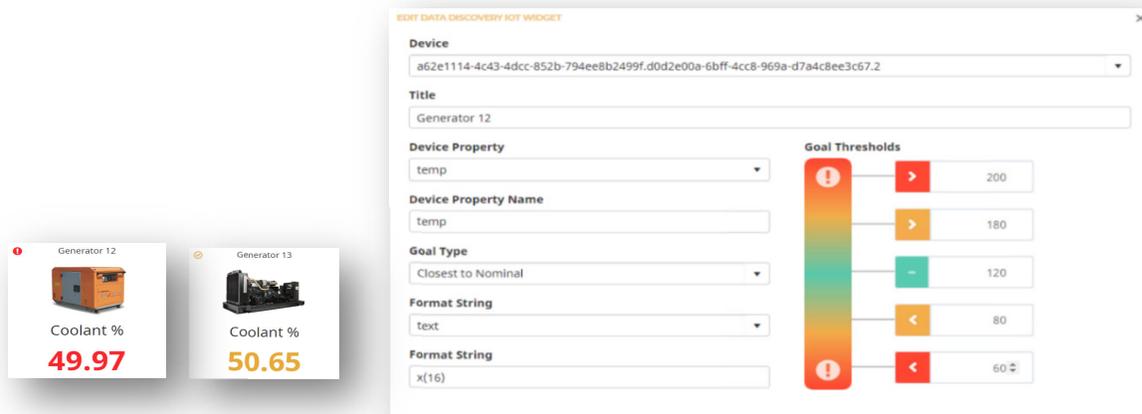
The following data visualization types are available in Epicor Data Discovery: grouped, stacked, and % stacked bar, line, bubble, scatter, dotplot, pie, and pivot table.

### 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 IoT widget

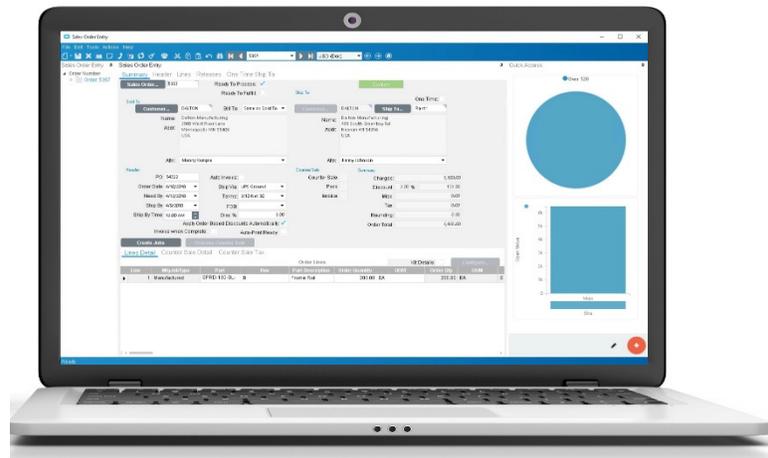
Release 10.2.400 introduces Epicor IoT, an application that gathers Internet of Things data. The Epicor IoT Data Discovery widget alerts decision makers to what needs attention on the shop floor. Each machine or device sensor can be set up with a Key Performance Indicator (KPI) settings, such as allowable temperature ranges. The results display through color-coded indicators to make it easy to spot the alerts.



**Note:** For you to view EDD IoT content, a license or subscription for Epicor IoT is required. Please refer to the “Epicor IoT” section in this document for details.

### Kinetic Theme

Simplifying Epicor ERP with a singular look makes it easier for new users to adopt. The default Kinetic theme embodies Epicor Kinetic Design principles and delivers unified colors, typography, icons, and user interface (UI) elements. Kinetic Themes are available for the Epicor ERP smart client, Epicor Web Access (EWA), and Mobile Framework (EMF). The simplified look makes it easier for all Epicor ERP users to transition between devices and interfaces.



## 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

Powered by Phocas, Epicor Data Analytics (EDA) helps companies turn their data stored in the Epicor ERP system into actionable insights. EDA is an easy-to-use service in the cloud that takes a unique, intuitive approach to lead you on a journey of discovery through large data sets contained in your data warehouse. With deeper insights, companies can grow by reducing cost, identifying new opportunities, supporting specific programs, and speeding up decision making. EDA provides customizable and interactive dashboards to make it easy to analyze the data inside your business systems. The dashboards contain visual KPIs, graphs, charts, and tables, so you can quickly review important information about your business performance and make informed strategic decisions. Once you have spotted an area of interest in the visual metrics, the EDA grid is where you conduct most of your analysis, and unlike a spreadsheet, you can “drill down” into the data with a simple click to reveal additional levels of detail and find your answers.

EDA offers additional Epicor ERP content packs, and you can easily augment them with any other ERP fields or other data sources like historical databases or spreadsheets. These content packs include:

- ▶ Sales Management
- ▶ Production Management
- ▶ Material Management
- ▶ Financial Management
- ▶ Mattec MES
- ▶ Epicor HCM
- ▶ Project Management

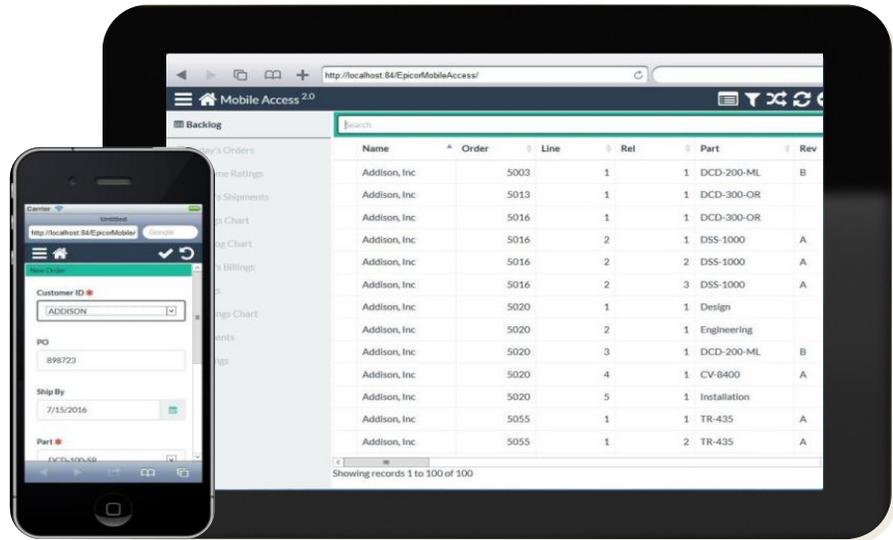


- ▶ Field Service
- ▶ Preventive Maintenance

## Epicor Mobile Access

Epicor ERP has extended the Epicor Framework to support mobile dashboards, which are rendered as web applications that may run on a number of mobile devices including tablets and smartphones.

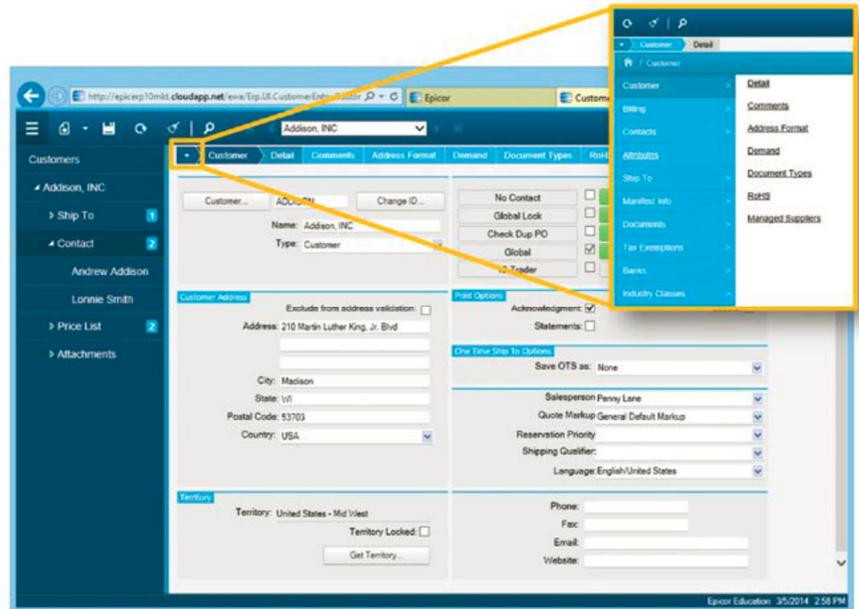
Leveraging responsive design, the applications automatically size to the device. Since the mobile dashboards that support Epicor Mobile Access are built using the dashboard technology and updatable BAQ technology, it is simple to create web applications that implement business functionality on mobile devices.



## Epicor Web Access (EWA)

Epicor Web Access has been enhanced to dramatically improve performance and usability. EWA for Epicor ERP 9 faithfully recreated the Smart Client form layouts, but the result was difficult to use on touch-enabled screens. For Epicor ERP 10.1, EWA changes many form elements for usability, making more screen area available for data.

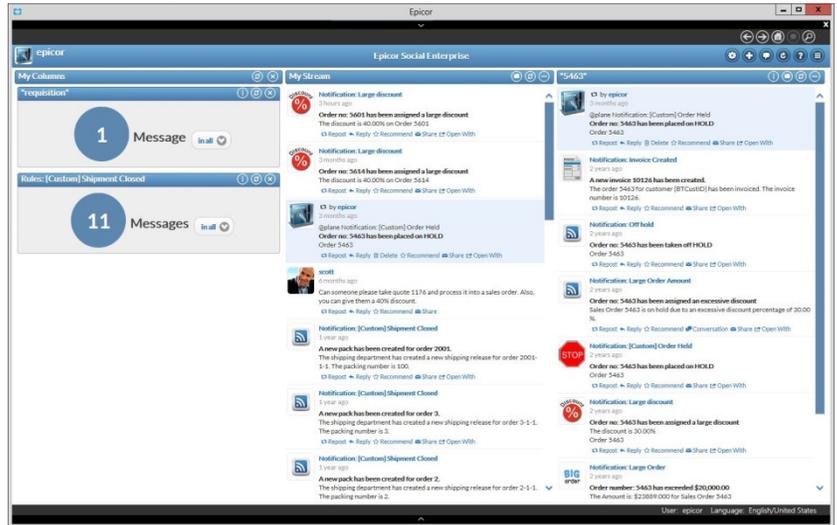
Epicor Web Access can be deployed on the same web server as the Epicor ERP 10.1 services—no dedicated server or website is required.



## Epicor Social Enterprise

Epicor Social Enterprise (ESE) is a new collaboration technology included in the Epicor ERP 10 base product. ESE provides an easy way for ERP users to form one or more communities around an area of interest or ERP information. Users “follow” the people, subjects, and ERP information that interests them. ESE displays messages created by users or the ERP information system as one or more “activity streams.”

Users can form conversation groups around common areas of interest or they can choose ERP artifacts like customers, parts, suppliers, and production orders to follow. ESE stores conversations about trading partners and internal operations and lets users contribute messages or research interactions about ERP information in context with application forms.



## Epicor Content Management (ECM) Powered by DocStar

Epicor recently acquired industry-leading enterprise content management (ECM) provider—DocStar. With the release of Epicor ERP 10.1.600, Epicor is introducing integrated ECM for Epicor ERP users.

Enterprise content management (ECM) is the technology used to capture, manage, store, preserve, and deliver content and documents related to organizational processes. ECM tools and strategies allow the management of organizations’ unstructured information, wherever that electronic information exists.

Epicor DocStar ECM is an industry leading product that’s built for the web and delivers deployment choice. Users can install DocStar ECM on their hardware or use DocStar in the cloud. The same software offers the same user experience and the same great results. DocStar ECM supports all popular browsers and mobile devices delivering access anytime, anywhere.

When deployed on DocStar hosted service, Epicor users can enjoy the benefits of very low overhead and minimal startup investment, easy access via a web browser. There is no specialized hardware to manage and there is no up-front capital investment. Although designed using robust enterprise architecture, DocStar ECM is flexible and affordable to meet the needs of a small office or enterprise environments.

DocStar capabilities protect content with the following:

### Security

- ▶ Monitor granular permission settings in documents, inboxes, folders, workflows, and retention policies to meet or exceed compliance requirements.

- ▶ Grant access to documents based on user permissions.
- ▶ Organize all enterprise information in a secure, central repository.
- ▶ Utilize Audit Trail to meet compliance requirements.
- ▶ Protect your data with secure encryption.
- ▶ Experience single sign-on (SSO) through Active Directory/LDAP integration.

### Audit Trail

With Audit Trail, you'll be able to know every time someone has viewed or changed any document. You'll know who performed the action, when it was done and what was done—reducing your exposure to risk and giving your business or organization the tools to operate more efficiently and profitably.

### Data Center

DocStar uses a secure, state-of-the-art data center with Amazon Web Services (AWS) that utilizes best practices for backup, maintenance, and upgrades to offer maximum performance and availability of your business-critical documents.

DocStar addresses and enables a number of processes including:

### Workflow

Easily create and edit content driven workflows using an intuitive graphical canvas.

- ▶ Create custom rules to process and route content for approval.
- ▶ Distribute items automatically based on business conditions.
- ▶ Receive real-time notification of workflow alerts and information.
- ▶ Monitor progress through the workflow dashboard.
- ▶ Complement existing business applications and technologies.

### Intelligent Capture

Capture documents from virtually any input device in any location.

- ▶ Access centralized storage from widely distributed locations.
- ▶ Easily import/save documents from applications and file systems.
- ▶ Utilize automated indexing—advanced OCR, barcodes, regex pattern matching, formatting.
- ▶ Use embedded browser-based scanning.
- ▶ Apply smart text extraction and evaluation of data from content.

### Forms

Easily create custom forms with drag and drop technology.

- ▶ Utilize easy to use drag and drop forms builder.
- ▶ Auto-populate data from other systems.
- ▶ Monitor permission-based security.

- ▶ Receive automated e-mail alerts for forms status.

## Search and Retrieve

Retrieval has never been easier with powerful context searching.

- ▶ Automatically perform commonly used searches (text, field, annotation, and name) from a web browser-style toolbar.
- ▶ Use simplified autocomplete or structured Boolean search.
- ▶ Search the contents of the entire repository in seconds.
- ▶ Perform “Fuzzy” searches to easily locate documents that sound similar.

## Document Retention

Easily apply and automatically enforce document retention policies.

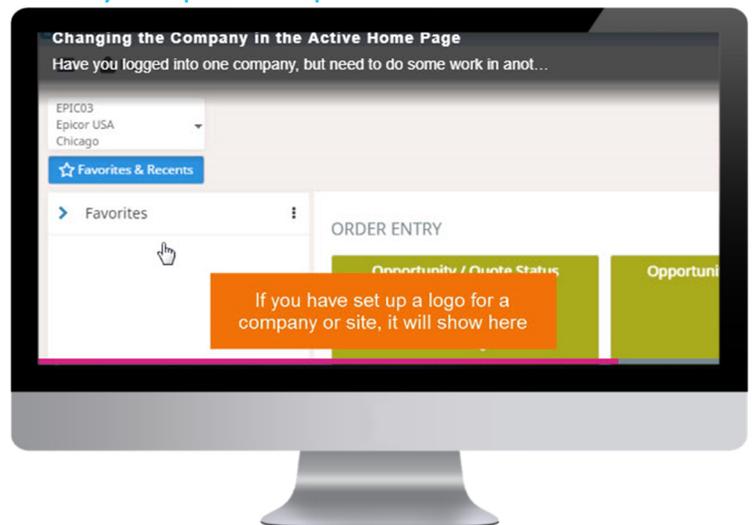
- ▶ Set document disposition to auto-destroy or place in review folder.
- ▶ Easily and instantly apply document freezes when necessary.
- ▶ Save time while easily complying with legal or organizational retention requirements.

Contact your customer account manager for details. Additional licensing is required for this solution.

## Epicor ERP Knowledge on Demand Video Library—[erpvideo.epicor.com](http://erpvideo.epicor.com)

Need quick answers to a question while working in ERP 10.2? Check out the growing library of Knowledge on Demand Videos!

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. KOD allows you to search the video library or browse a category for in-app help with no login required. If you have not yet upgraded but would still like access to KOD videos, go to [erpvideo.epicor.com](http://erpvideo.epicor.com).



## 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

## Online Help and Embedded Education Courses Available Through Azure

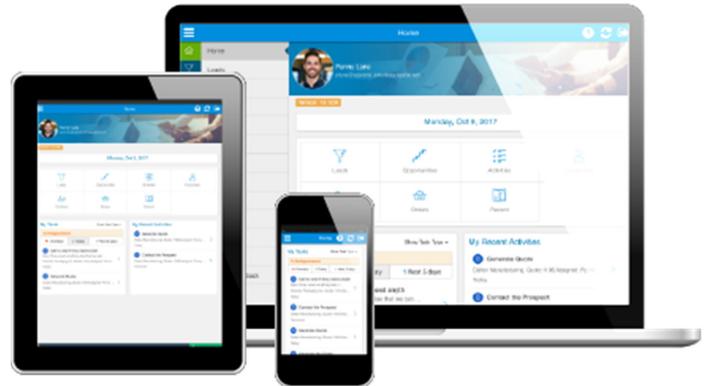
Epicor leverages the robust Microsoft Azure platform, and—as an added feature—Azure search uses natural language in addition to the exact match capabilities offered by the on premises version of help. Additionally, advanced search lets users define terms in exact match rather than all matches of either 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.

# ERP for Sales Managers and Estimators

## Epicor Mobile CRM

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

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

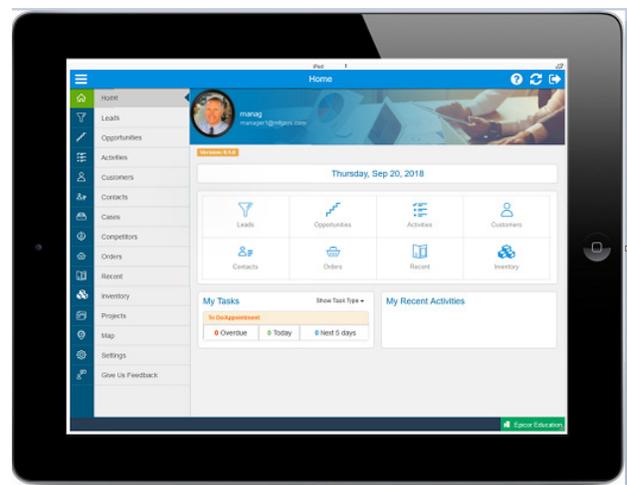


Through our next-generation mobile application, you can manage leads, customers, and contacts, as well as quotes from opportunity to order. Create activity-based workflows like call and email logging, notes, “to do” lists and appointments, and implement your back-office task workflow. Access data related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

Epicor Mobile CRM expands 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 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.

Epicor Mobile CRM is an integral part of your Epicor ERP solution, and can be utilized at no additional cost beyond your back-office user license or CRM user license. However for sales order and shipment capabilities, “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.

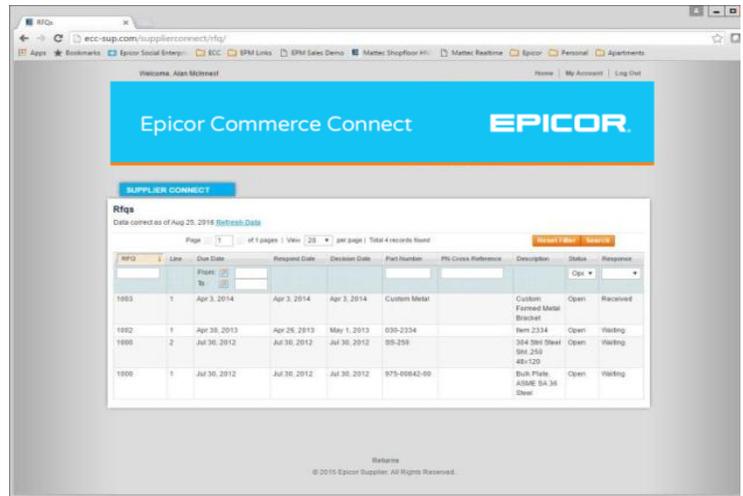


Mobile CRM supports different language and international formats, including English and Spanish.

## Epicor Commerce Connect—new module

Epicor Commerce Connect (ECC) extends business boundaries with a proven commerce architecture that connects your business to consumers, customers, and suppliers. It enables you utilize your website to drive revenue, increase customer satisfaction, and grow your business. ECC also reduces the time to setup a customized, attractive, and simple-to-use website.

While many companies can provide eCommerce services, very few leading providers are able to deliver the value and rapid results the way that Epicor Commerce Connect can. ECC supports the Magento eCommerce platform, and provides a scalable solution backed by an extensive support network, and allows you to build a site to help fit your unique business needs.

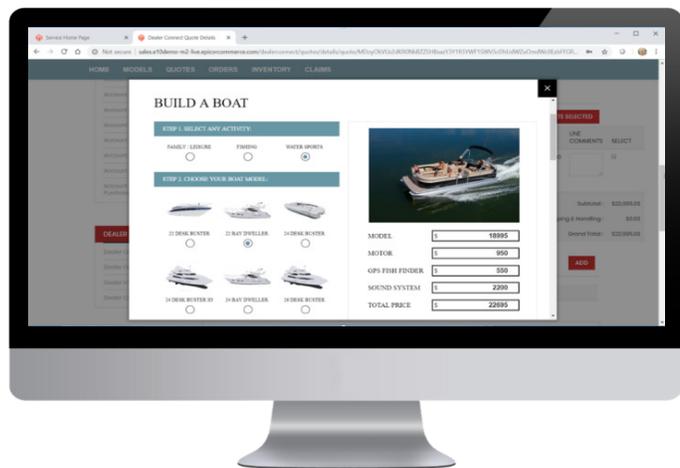


Fully integrated to Epicor ERP, ECC eliminates the need to maintain a separate product database and provides streamlined access to ordering, product, or account information, plus marketing and customer-service processes—all in real-time using ERP data. ECC utilizes leading Magento technology to provide the templates and tools to build an online presence and is extendable through Magento's own application store and vast network of design and add-on application providers.

Fully integrated with Commerce Connect, Epicor Product Configurator enables web-based configurations that can be used for quoting and pricing within the ECC solution. Once configurations are accepted by your customer, the instant flow to Epicor ERP enables not only price, but also product build to be delivered for more rapid response to new orders. Use the robust configuration capabilities and extend them to your customers and channel to ensure that customer requirements are met.

## 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.

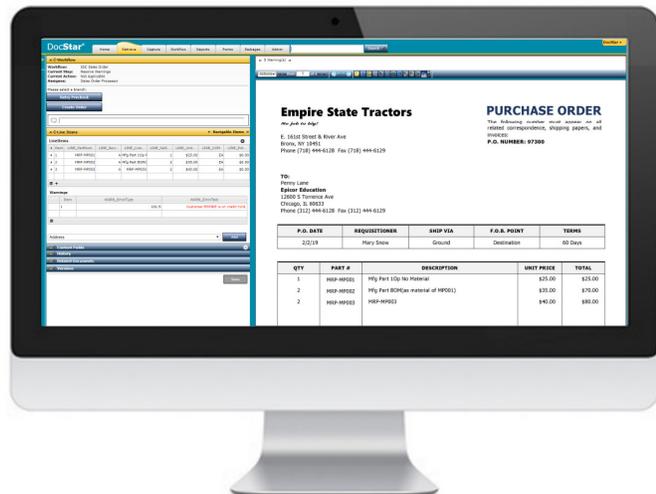
The Epicor Commerce Connect Dealer Network Portal requires an additional license.

## Sales Order Automation

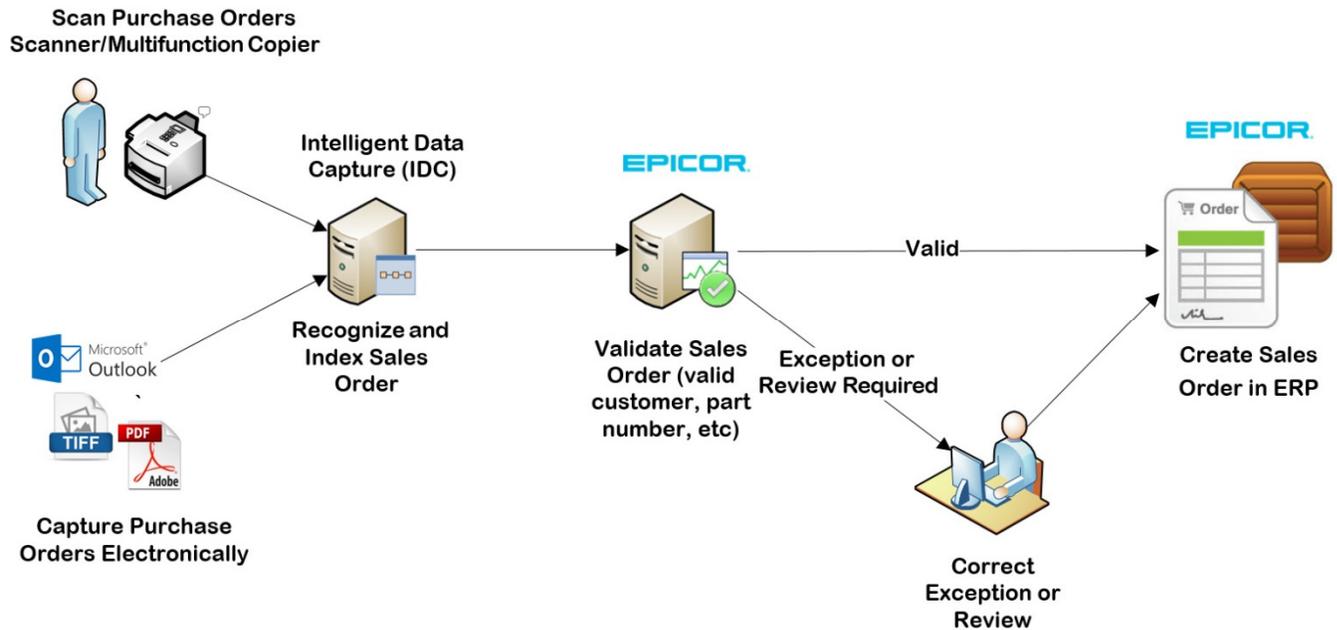
### Capture, validate, route, automate, integrate

Sales Order Automation is the ideal solution for the Epicor ERP enterprise that processes hundreds of orders per day with customers who do not use eCommerce. This add-on module links with DocStar ECM to capture inbound purchase orders from email attachments, emails that contain structured order information, or direct scans from a network scanner or multifunction copier.

The documents funnel through a uniform order entry process. The inbound data process captures different PO document formats from different customers, extracts required information, indexes it, and then moves the information into automated order entry workflows. These workflows determine if the customer is valid or on credit hold, if the part number is valid or available, or if the order is valid against the original quote. Exceptions are sent to the appropriate person for



review. Orders that pass the validation process are transformed into a sales order in Epicor ERP. These orders indicate they were generated from DocStar.



### Intelligent data capture

Instantly recognize and extract key information from inbound customer purchase orders. Using industry leading OCR technology and sophisticated processing algorithms, Automated Order Entry achieves the high levels of data accuracy.

- ▶ Automatically captures and processes customer purchase orders
- ▶ Improves accuracy with automated data matching
- ▶ Intelligently reads new PO formats
- ▶ Speeds customer service time

### Compliance

Helps ease regulatory compliance and retention requirements. Consistent and secure, Sales Order Automation ensures your organization follows your recommended procedures.

- ▶ Helps ensure records retention compliance
- ▶ Uses audit trails to monitor document access and activity
- ▶ Guarantees file integrity with DocStar authentication -- which time and date stamps every image
- ▶ In the event of a disaster, electronic document storage ensures file safety and security
- ▶ Uses full reporting tools so you gain greater business insight

### Improve customer relations

Instantly respond to customer requests instead of wasting time looking through file cabinets. This improves customer relations, freeing up your team to focus on more important tasks.

- ▶ Instantly finds purchase orders and their supporting documentation
- ▶ Quickly emails documents to customers while they are still on the phone
- ▶ Save costs associated with paper access and distribution

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

## Configuration management redefined

The Configurator process allows for on-the-fly configuration of highly customizable and dimensional products. You can configure products through a straightforward question and answer evaluation, entry of straightforward question-and-answer evaluation, or by entry of Smart Strings (intelligent part numbers) used to identify a particular configuration of an item. This hasn't changed.

In Epicor ERP 10, the Configurator Designer functionalities are divided among the following entry programs: Configurator Entry, Configurator Designer, and Configurator Rule Entry. There are two main reasons for dividing the Configurator Designer into three different programs:

- ▶ Performance—Having fewer functionality panels in three single-entry programs improves performance.
- ▶ Ease of use—With three different entry programs introduced in Epicor 10, you can go directly to the functionality you require. For instance, splitting off Configurator Entry and Configurator Rule Entry provides the user with more space to set up the configurator functions and fewer sheets to navigate. It also allows the user to have a different user interface (UI) concept, with most functionalities included in the Property of the Configurator Designer program.
- ▶ 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.
- ▶ Allow Recycling of MRP Jobs
- ▶ Image Layering

## Epicor ERP integration with Salesforce.com®

Eliminating manual entries of the same data into multiple disparate systems can save time and lessen human error. With the Epicor ERP Integration to Salesforce.com, you can help ensure your contact management system and your Epicor ERP CRM solutions are in sync. This extension is a true integration between Epicor ERP and your Salesforce.com software, as it does not rely on another tool.

## RMA Processing—multiple credit memo requests for a single RMA entry

RMA processing has been expanded to offer the ability to generate additional credit memos off a single RMA entry. Originally the system only offered a single credit memo per RMA entry. This makes it easier to respond to customers' requests for additional credit memos on a single entry and preserves the audit trail for the event.

## Demand Management general improvements

Various EDI and Demand Management improvements have been implemented to more easily support the requirements of trading partners. In particular, the solution offers multi-currency support, and now allows you to receive and respond to a specific ship-by time and date from a trading partner.

Epicor ERP now handles the management of parts designated for run-out, where rules can be applied to parts that are at the end of their life. When receiving inbound EDI, the applied rules may reject the EDI submission or issue a warning for the Demand Log or Demand Review Report informing you that the incoming demand contains a part number that is designated as a run-out part.

The user can reduce the complexity and cost of manipulating incoming EDI data in the Import EDI Demand Process by leveraging BPM. You can use several predefined method directives for further manipulation of data contained in inbound text-based EDI .app files (inbound EDI transactions) from your customer trading partners.

## Quote Management general improvements

New rules enable the user to determine the default line quantity as either a constant or based on the first quantity break. Also, you can specify a miscellaneous charge on a quote line for a material. Build Project Analysis can differentiate between the materials flagged as miscellaneous charges (rolled into ODC Quoted), and those not flagged as miscellaneous charges (rolled into Material Quoted). A customer's principal sales representative displays in the Primary Salesperson field on the Summary sheet in Opportunity/Quote Entry, and you can edit it there. Finally, users can determine where material costs are derived with a new checkbox, Get Costs from Inventory, which determines if costs are taken from inventory or from the quote. The default can be overridden during quote creation.

## Capable to Promise (CTP) improvements

Be confident in your ability to meet customer expectations with improvements made through Order Entry CTP functionality. Below is a list of new features designed to improve on the analysis coming from CTP:

- ▶ A new Avail Qty field, in the Capable to Promise window (accessed from the Actions menu in Sales Order Entry), displays the on-hand inventory quantity that is projected to be available—i.e., not already committed to other demand—on the requested order release ship date, as of the current system date.
- ▶ New Make To Order and Make To Stock settings in Site Configuration can be used to specify if CTP, when processing a manufactured part on a Make to Order (MTO) or Make to Stock (MTS) order release, should create a firm job, un-firm job, or no job when you click the Confirm button in the Capable to Promise window and there is insufficient supply available to cover the demand for the part.
- ▶ Expand the scope of CTP with a new Part Lead Time checkbox on the Site Configuration Control. The feature changes the CTP calculation to determine whether an order can be filled on the requested shipment date for this site based on all demand for the part when comparing demand against all expected supply within the part's lead time. Without the flag, CTP calculations only consider demand from the current order.
- ▶ A new Past Due Completion Date indicator tells the user that the completion date calculated by the Capable to Promise functionality is past the Ship By date on the selected order release. An accompanying Days Past Ship By field displays the number of days that the calculated completion date is past the order release Ship By date.
- ▶ Multi-Level Capable to Promise (CTP) for Kits 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.

## New dashboard—Projected Sales Order Shortage dashboard

Use the Projected Sales Order Shortage dashboard to examine sales orders that have reservations (soft allocations) and allocations placed against them to avoid any sales orders becoming overdue. Used with multi-level pegging functionality in Epicor ERP, the Projected Sales Order Shortage dashboard allows you to examine sales orders based on customer ID, customer name, order number, or need-by dates, and determine where a potential shortage in supply may occur. This provides you with information concerning demand that needs to be adjusted to prevent the sales order from becoming overdue. This dashboard attempts to answer the following three questions:

- ▶ Which sales orders do not have supply placed against them?
- ▶ Which sales orders will be supplied late?
- ▶ How is a sales order intended to be fulfilled?

## Ready to fulfill control in Sales Order Entry

For users who leverage the Fulfillment Workbench to execute the fulfillment process and direct shipment of product, Epicor ERP now offers a new checkbox at the release level that indicates the release is “Ready to Fulfill” which sends the release to the Fulfillment Workbench for fulfillment. To indicate in mass that all lines and releases are ready to fulfill, users can use a checkbox on the Summary and Order Header.

## Sales Order Payment Schedules

New functionality has been added to the sales order to enable a salesperson or order processing clerk to maintain a payment schedule for the order at the time of booking. This functionality previously was only available at time of invoice. Now, with offering this capability at time of the order, it offers greater flexibility in meeting customer expectations for payment and for users looking to manage their renewals business, offers light functionality to support these processes.

## 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.

# ERP for the Production Manager, COO

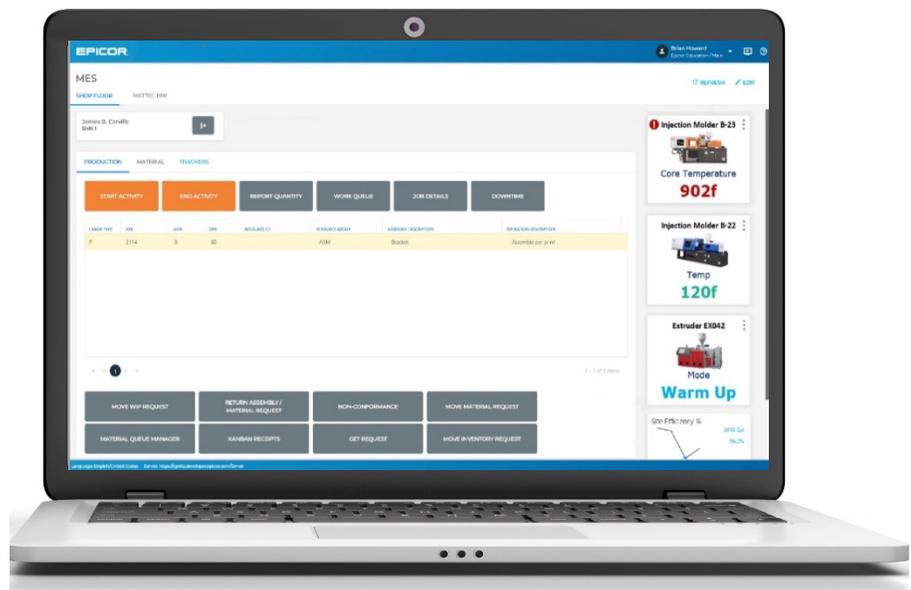
In the area of production management, Epicor ERP has introduced improvements designed to offer greater productivity, simplicity to improve worker efficiency and satisfaction, and more responsiveness to improve customer loyalty.

Here we see features that have been added in recent releases like multi-job scheduling where you can take linked jobs and schedule them as one. From a worker experience perspective, we have image management where you can save images within the Epicor ERP database, and the work queue now supports filters and paging. To serve customers better, we have the primary sales person being added to the quote header.

 Greater Productivity	 Worker Experience	 Customer Service
<ul style="list-style-type: none"> <li>▶ <b>Epicor IoT*</b></li> <li>▶ BOM Allows Zero Quantity / Parent</li> <li>▶ Kanban Receipts – Non-Stock Parts</li> <li>▶ Production Reports Search Filter</li> <li>▶ Resource Group Mtc Limited to Current Site</li> <li>▶ Improved Performance for Complex Methods in Job Entry</li> <li>▶ Get Details Creates Revision and BOM for Non Master Part Subassemblies</li> <li>▶ Top Level Time</li> <li>▶ Fixed Quantity in Batched Operations</li> <li>▶ Projects Build Projects Analysis</li> <li>▶ Include Project Billing Costs from Unrecognized Revenues</li> <li>▶ MRP – Process MRP Utilizes Production Calendars to Use Dynamic Days of Supply in Lead Time</li> <li>▶ MRP Load Balancing</li> </ul>	<ul style="list-style-type: none"> <li>▶ User Experience               <ul style="list-style-type: none"> <li>○ Active home Page</li> <li>○ Mobile User Experience</li> <li>○ Epicor Web Access Touch Enabled</li> <li>○ Social Enterprise</li> </ul> </li> <li>▶ Reduce Steps in Processing Jobs in Job Entry</li> <li>▶ Approve and Check in at same time in the EWB</li> <li>▶ MES Improvements</li> <li>▶ Company configuration – Default Qty/Parent</li> <li>▶ Backflush Labor and Quantity</li> <li>▶ Job Tracker Displays Assembly cost Totals and Details</li> <li>▶ WIP Report Improved Filtering Options</li> <li>▶ Enable Scheduling Debug Log</li> <li>▶ Supplier Due Date Horizon</li> <li>▶ Add an Attachment in Project Entry for a WBS Phase and a Checklist Task</li> <li>▶ Epicor Mobile CRM</li> <li>▶ <b>DocStar ECM, an Epicor Solution*</b></li> </ul>	<ul style="list-style-type: none"> <li>▶ MRP by Part</li> <li>▶ Manufacturing Lead Time Includes Receive Time for Subcontractors</li> <li>▶ Epicor PLM Integration Improvements</li> <li>▶ Multi-Job Options in the Job Scheduling Board</li> <li>▶ Allow move Jobs Across Sites (multi-Job)</li> <li>▶ Ignore Constrained Materials in Global Scheduling</li> <li>▶ Schedule Multi-Job</li> <li>▶ Request move Default Settings in Company Configuration</li> <li>▶ Configurator Designer – 2D Visualization</li> <li>▶ <b>Epicor Field Service Automation (FSA)*</b></li> </ul>
		<div style="background-color: #0070C0; color: white; padding: 2px 5px; display: inline-block;">*New Modular Functionality</div>

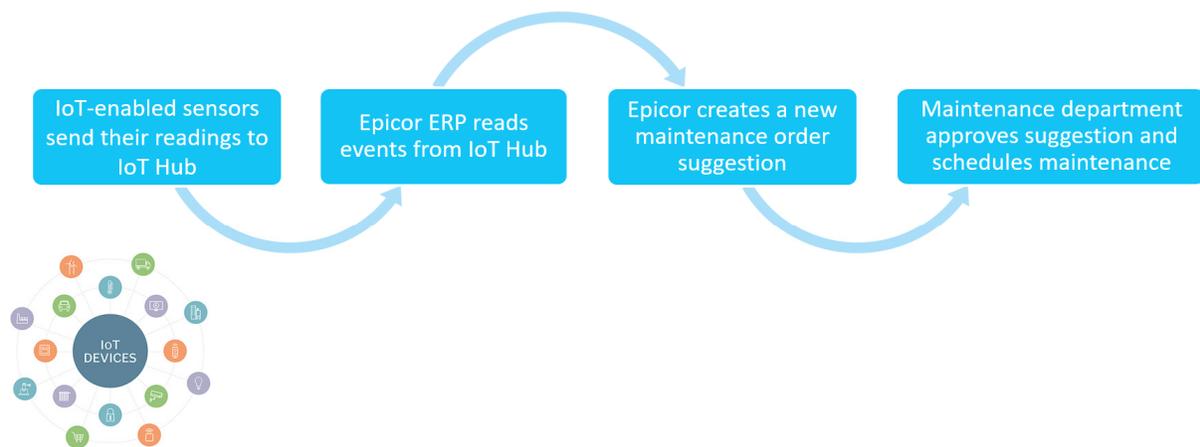
## Top Requested Feature - Epicor IoT

Epicor IoT is an Epicor ERP module that integrates with the Microsoft® Azure IoT Hub. This application monitors and visualizes data from sensors and other Epicor products. Epicor IoT leverages Microsoft® Azure IoT Hub to gather Epicor ERP's context and in-depth production data. Users can gain intelligent insights into the production and day-to-day enterprise activities, achieving deep levels of operational efficiency.



Epicor IoT can monitor data from equipment, assets, environmental factors, and inventory locations. Events, sensor data, and machine telemetry data flow into the IoT hub. From there, the Epicor IoT Administrator can choose which data propagates to the Epicor IoT module. Epicor IoT leverages an advanced rule-based engine to detect patterns and raise alerts and notifications that propagate into ERP where they can be used to trigger business process changes. For example, when the IoT detects degrading equipment, it raises a maintenance suggestion.

### Sample workflow:



Epicor ERP provides an intuitive set of tools that both visualizes the IoT data and sets up the alerts and notifications you want. It delivers a rich set of the Internet of Things data, fully driven and controlled by an industry-leading ERP solution.

### Visualization and notification tools

- ▶ Epicor IoT Data Discovery capabilities visualize KPIs on the Active Home Page or the new Kinetic MES Shop Floor Interface. Decision makers can quickly determine what needs attention, such as when a machine's performance parameters are out of range. Issues are then turned into actions, preventing efficiency degradation
- ▶ Through the rules engine, users define BPM rules that trigger alerts, notifications, or other business processes
- ▶ A Business Activity Query (BAQ) can utilize IoT information from sensors and then trigger an action in the database

## Epicor IoT benefits

- ▶ Increase productivity by automating the data collection and identifying issues early through visualization tools
- ▶ Generates more accurate KPI's by capturing data automatically instead of relying on human interaction
- ▶ Improve decision-making through actionable information deliver near real-time
- ▶ Anticipate and pre-empt equipment and production degradation through a rule-based alert system
- ▶ Automating data collection IoT reduces manual data entry and improves labor costs, enabling workers to focus on creative and problem-solving tasks
- ▶ Connects to IoT sensors inside and outside of your facility, capturing meaningful information and improving customer satisfaction

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

## Top requested feature—MRP by part

New functionality in MRP allows MRP to run for a single part, part class, or product group. Also, with the use of a new option, PartRunMRP, Process MRP includes sub-assemblies of the processed manufactured part, even if they were not selected.

## Top requested feature—BOM allows zero in Qty/Parent field

You can enter a material with a “zero” quantity on a BOM when working with a revision in the Engineering Workbench, in Quote Manufacturing Details, or in Job Entry. Prior to the addition of this feature, entering a value of zero in the Qty/Parent field caused an error message to display.

## Top requested feature—reduce steps in processing jobs in Job Entry

New features in Job Entry reduce unnecessary steps for users, reduce processing, and improve user satisfaction and adoption of Epicor ERP.

- ▶ Get Details and Schedule allows users to both pull in manufacturing details and schedule the job in a single step
- ▶ Auto Schedule On Release allows users to both schedule and release jobs to the floor in a single step
- ▶ Print in mass jobs created in Quick Job Entry, rather than one by one
- ▶ A new option, Get Costs from Job checkbox determines if costs are driven from the job template or from inventory—the default can be overridden during the creation of a job
- ▶ Operation Instructions can optionally print on the Job Traveler and can also be seen while clocked into an operation in MES.

## Top requested feature—Approve and Check-in at EWB

In the Engineering Workbench, there is a new option to both “Approve and Check-In” with a single step.

## Top requested feature—Manufacturing Execution System improvements

Improvements in MES ensure operations match reality on the plant floor.

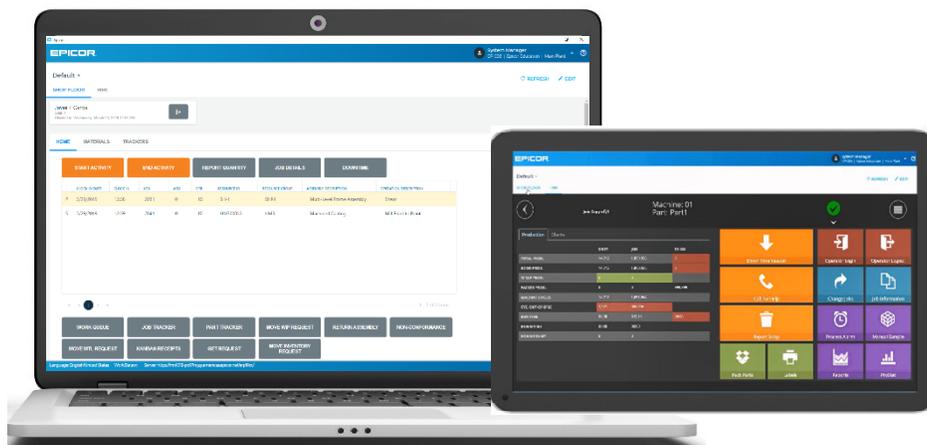
- ▶ Right from the main MES menu, users have the ability to change the current company and enter their time against the new company or a new site.
- ▶ MES customization is simplified with a new developer mode option similar to the other forms in the Epicor ERP solution.
- ▶ Job Details and Documents Maintenance programs are accessible from the MES station while working on a job.
- ▶ Downtime is available to be recorded when the resource is in production and something interrupts that production, causing the resource to be down, requiring immediate attention. This is different from indirect codes which are used to track non-production time for a variety of reasons. By separating downtime from indirect time, users can more easily record and analyze downtime events. The downtime record holds the job number for analytical purposes, as identification of root cause can lead to downtime reduction and increased productivity. Downtime can optionally be printed with the Production Detail Report.

## Manufacturing Execution System (MES) in the Kinetic Design System

The Manufacturing Execution System (MES) has begun its transition to the Kinetic Design System, transforming how shop floor users interact with the system. Its modern and sleek interface provides users with a revolutionary functional and visual experience.

### Simplified workflow

The interface streamlines MES tasks for intuitive, functional task completion. To improve simplicity, tabs were combined and functions redesigned. This reduces redundant entries and improves navigation, increasing shop floor efficiency and worker satisfaction.



## Modern look and feel

Visual stimulating, the MES shop floor interface reflects the needs of today's manufacturers. Manufacturers who invest in plant modernization and current technology are more competitive in the job market and better able to attract and retain good workers.

## Access on the go

MES is no longer just a desktop application, now users can connect to MES through their devices as it resizes and scales on a tablet for easier use on the shop floor. This improves the accuracy and timeliness of data coming from the shop floor.

## Common interface with Mattec MES HMI

When Advanced MES (Mattec MES) is delivered with Epicor ERP, shop-floor ERP MES users can access the Mattec MES Human Machine Interface (HMI) directly. Single sign-on (SSO) ensures a seamless interface experience for both systems and reduces the complexity of using these systems at the same time. This feature is exclusive of the Kinetic MES Interface

## IoT Widgets on Epicor MES

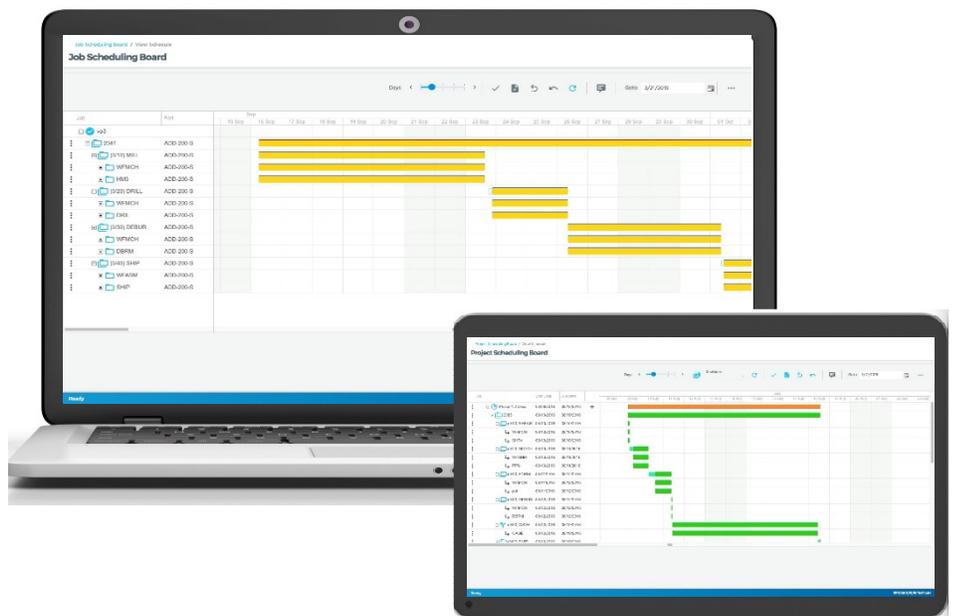
Customers that are using the Epicor ERP IoT Module can use Epicor Data Discovery IoT visualization widgets in the Kinetic MES interface and the Active Home Page.

## Transition to Kinetic

You can gradually transition shop floor personnel to the go forward Kinetic Design interface as the previous version of the MES Shop Floor Interface will still exist in 10.2.400 and following releases, while the Kinetic transition of the MES interfaces is being completed. This new version of the interface uses the same data collection licenses as the current MES shop-floor interface.

## Scheduling Boards in the Kinetic Design System

The Job, Resource, Project, and Multi-resource scheduling boards are now available in the Kinetic Design System. This interface offers a uniquely functional and visual design. From the cloud to their devices, Epicor Kinetic

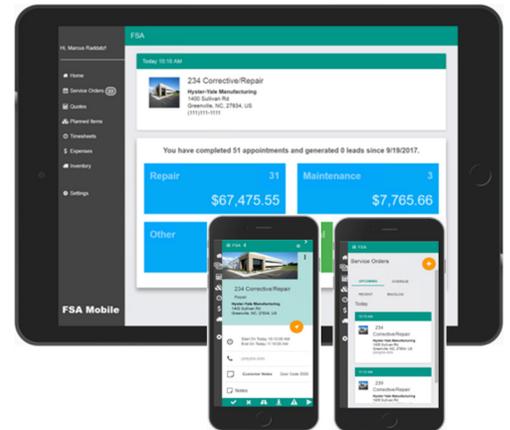


enables users to become more productive by simplifying daily tasks. Applications built with Epicor Kinetic Design principles are fast and intuitive, as this interface design provides true ease of use. Epicor's priority is to develop new products and redesign existing ones through the Epicor Kinetic Design System.

## Epicor Field Service Automation (FSA)

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

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



- ▶ Speed-up and optimize scheduling and dispatch
- ▶ Seamless integration with Epicor ERP
- ▶ Streamline the work order life cycle
- ▶ Manage contracts, warranties, and assets more efficiently
- ▶ Gain real-time insight for improvement
- ▶ Call center, scheduling, and dispatch management
- ▶ Work order life-cycle management
- ▶ Contract and service-level agreement (SLA) management
- ▶ Asset and warranty management
- ▶ Resource tracking and performance management
- ▶ Vendor and customer portal
- ▶ Sales and marketing
- ▶ Workflow
- ▶ Inventory management
- ▶ Maps® integration
- ▶ Mobile Experience

## Company configuration—default Qty/Parent

With the ability to have “zero” as a valid answer to the default quantity question in recent releases, it is no longer becomes appropriate to use zero as the default that needs to be changed by the user at the time of entry. Rather than force a number, the team offers a configuration at the company level where you can determine this default. One best practice recommended by product management is to use one in the default.

## Kanban Receipts—non-stock parts

Expanding the use of Kanban Receipts, we can now receive a non-stocked part through Kanban Receipts.

## Manufacturing lead time includes receive time for subcontractors

In addition to the subcontracting days-out lead time that the system manages, you can optionally add lead time for receiving from subcontractors. For example, you may have a day of inspection needed on received items.

## Production reports search filter

Field Service and Maintenance Service jobs are now easily filtered based on the job type of “service” in the following reports.

- ▶ Job Traveler Report
- ▶ Production Detail Report
- ▶ Work in Process Report
- ▶ Inventory/WIP Reconciliation Report

## Resource Group maintenance limited to current site

New controls make it easier to ensure that you are updating the right site when changing Resource Groups. The user must be logged into the site in order to change a Resource Group for that site. Previously if the user has security access to the site, they could make these changes without being logged into the site.

## Backflush labor and quantity

Save time and improve accuracy in reporting quantities by being able to specify at the operation level whether only Time—Backflush Qty or Time and Quantity are available for entry at the time of completion. If the new Time—Backflush Qty option is selected, the time will be recognized based on the timecard, and the quantity will be backflushed based on the actual quantity reported on the following operation. Once the actual quantity is entered at a later operation, the system trues-up previous steps to the entered quantity. For example, you may have a shipping function where final quantities are confirmed and previous steps are backflushed based on operational standards of scrap, etc. Once the shipment operation is signed off, the quantities are updated to reflect the quantity shipped.

## Improved performance for complex methods in Job Entry

For users with a complex method of manufacture that include a large number of Bill of Operations and Bill of Materials, a new Suspended Cost and Quantity Rollups feature improves performance by allowing users to suspend the automatic cost and quantity rollups on a job as methods are updated. Updates can instead be done all at once to improve the transaction processing time between the client and server.

## Job Tracker displays assembly cost totals and details

The Job Tracker has been improved to display the total assembly cost at the current part level as well as the lower levels. The total value calculation is based on the Material Cost + Labor Cost + Burden Cost + Subcontract Cost + Material Burden Cost.

## WIP Report improved filtering options

Filtering improvements within the WIP Report offer greater job analysis. For example:

- ▶ A new Jobs not Closed checkbox allows users to display only open jobs with a WIP balance
- ▶ A new WIP Cleared Job section dictates whether the jobs with the WIP Cleared checkbox (cleared/selected) located in Job Completion/Closing Maintenance display in the report

## Epicor PLM Integration Improvements

Epicor PLM is an industry-leading product lifecycle management (PLM) solution that delivers on management of documentation, process, and CAD integration needed for growing businesses. New features to improve the immediacy of data between PLM and Epicor ERP offer greater responsiveness:

- ▶ The standard Epicor PLM integration now includes the Bill of Operations in addition to the Bill of Material.
- ▶ Improvements in the Epicor Product Lifecycle Management (PLM) integration include the ability to determine the type of part revision that the PLM Server Process exports when transferring PLM integration data from the Epicor system to the PLM system. The user can select either Current (effective date equal or less than today) or Last Approved (last approved, regardless of effective date or whether currently approved).

## Get Details creates revision and BOM for non-master-part sub-assemblies

If you are using Get Details to copy details from a quote or a job to a method of manufacture (bill of material) in the Engineering Workbench, the Epicor application automatically creates parts in the Part Master table for those parts that are not there already. The revision and its bill of material are also created. This is to satisfy the requirement that all parts that are associated with a bill of material must exist in the Part Master table.

## Top-level time

At the assembly level of each part or component, the system maintains a manufacturing lead time. This does not include time on lower-level parts. This is based on the current method of manufacturing, and is used to improve performance and accuracy in CTP calculations.

## Enable Scheduling Debug Log

Troubleshooting MRP and scheduling can be a tedious process. The logs have always been a great tool to assist users in understanding the logic being used in these complex processes. Whether guided by Epicor support or doing your own analysis, you can use the new logging functionality. Once the Scheduling Debug Log has been enabled in company configuration, the Epicor application will generate Individual Scheduling logs.

## Scheduling Multi-job

Use the Scheduling Multi-job option to schedule a group of associated jobs as if it were a single job. Jobs are associated via make-to-job relationships. This feature makes it possible to schedule and re-arrange manufacturing jobs for a parent assembly and its child subassemblies (called predecessor and successor jobs) all at the same time. Prior to the introduction of this functionality, the scheduling planner had to watch linked jobs closely to ensure that they were scheduled together so that all demands were met.

## Multi-job options in the Job Scheduling Board

Multi-Job job scheduling where you can schedule linked jobs together has been expanded to offer the ability in the Job Scheduling Board to Minimize WIP, Ignore Locks, and Recalculate Expected Yield in the Move Job window.

## Allow Move Jobs Across Sites (Multi-job)

A new feature, Allow Move Jobs Across Sites, used when running in Multi-job mode causes the scheduling engine to treat a group of jobs that includes a job in another site as part of the group and any rescheduling efforts will also reschedule the job in the other site. This works for any site—not just the site where the user is logged on.

The Scheduling Board shows jobs in other sites when they are linked to a job in the current site. The jobs from the other sites are read-only, but you can move them as a group by selecting and moving a linked job from the current site.

For example, a project to build a school includes several jobs (300, 310, and 320) to be completed on Site A, and one job (400) to be completed on Site B. When you are logged in to Site A, the Scheduling Board will show all four jobs. You can see job 400, but it can only be moved if you move 300, 310, or 320. To move job 400 directly, you must log in to Site B.

## Fixed quantity in batched operations

When batching operations in a new job, the Required Quantity of the materials is calculated to use Quantity per Parent field unless all of the materials in the original jobs that were batched together have the Fixed Qty checkbox marked. In that case, the new job will calculate the Required Quantity of the materials with the Fixed Qty checkbox also marked.

## Ignore Constrained Materials in Global Scheduling

The Global Scheduling Process includes an Ignore Material Constraints checkbox, similar to the one in the MRP process. When a material is constrained, use the scheduling engine to determine when a material is available for an operation. This date is used as the operation's Start Date.

## Site Maintenance—Supplier Due Date Horizon

Use the Supplier Due Date Horizon fields in Site Maintenance and in Supplier Maintenance to define the number of days from the purchase order (PO) release due date that the Scheduling engine considers incoming purchase order releases for a site (or supplier) to be late. Available to Promise (ATP) and CTP also use this setting to determine if incoming PO releases for the supplier should be considered in the calculations as a potential sources of supply.

## Multiple projects build project analysis

The user can now choose more than one project at a time to build project analysis. As some projects are quite large and can take a significant amount of time to build project analysis, this enables the system to build multiple at the same time, saving a tremendous amount of time overall.

## Project management—Include Project Billing Costs from Unrecognized Revenues

An Include Project Billing Costs from Unrecognized Revenues checkbox displays in the Capture COS/WIP Activity program, allowing you to recognize costs even though the related revenue has not been recognized.

## Add an attachment in Project Entry for a WBS phase or checklist task

The Attachment Management functionality is enabled for both WBS phases and checklist tasks within the Project Entry window.

## Process MRP Production Calendars to use dynamic Days of Supply in lead time

Days of Supply in MRP can now be calculated based on the Production Calendar instead of the regular calendar days. There is a new flag in site maintenance to make this change.

## 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.

## MRP load balancing

If you use a load balancer to improve performance, modify the system agent so it can find the main application server that handles load balancing. This improves the performance of MRP processing.

## Request Move default settings in Company Configuration

New defaults, Request Move for Passed Items and Request Move for Failed Items, direct put-away of quality items.

## Mattec MES Integration

Discrete manufacturers use Epicor Mattec MES to improve quality, reduce scrap, assure on-time delivery, and boost production throughput. It's all about improving production execution and performance efficiency to gain a competitive advantage. Mattec MES specializes in meeting the needs of high-run plastics manufacturers, metalformers, and stampers.

Epicor Mattec MES collects data directly from equipment and operators on the shop floor in real time, minimizing inaccurate and time-consuming manual data collection. With immediate information 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.

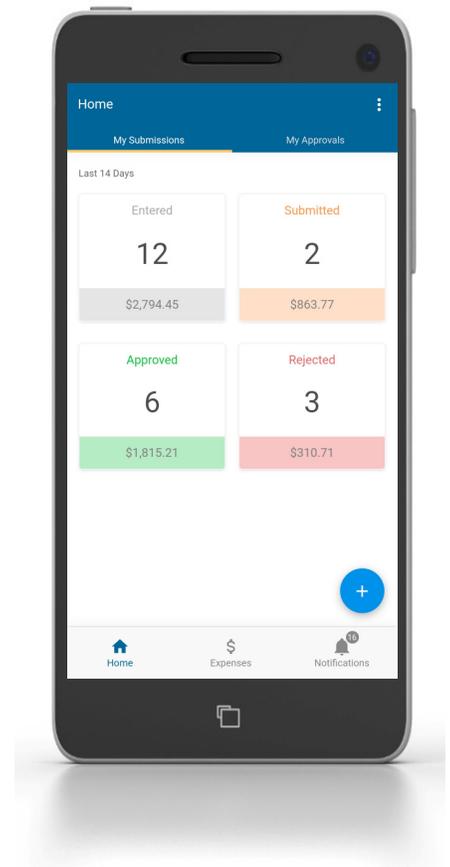
To get more out of your manufacturing operations, and more for your business, get the MES system that automatically monitors machines and analyzes production and performance data 24x7.

## Epicor Mobile Expense Management

Mobile Expense Management is an application built for Epicor ERP that uses the Kinetic Design System. It extends the Expense Management module by giving users the mobile modern, intuitive user experience they need to effectively control expenses.

Through Mobile Expense Management, you get full control and visibility into your expense tracking and processing. Provide your project managers and their teams, frequent travelers, and your salesforce with the ability to capture expense entries and approvals—anytime, anywhere— through an interface that simplifies the process. With Mobile Expense Management, you can:

- ▶ Create general and project expense reports
- ▶ Review and approve expenses fast and easy
- ▶ Get in-app notifications to track changes
- ▶ Add multiple receipts and photos
- ▶ Capture payment method
- ▶ For repetitive expenses, use quick codes or copy existing reports to create a new one
- ▶ Manage multiple currencies and tax liabilities



▶ View data in offline mode

Epicor Mobile Expense Management is compatible with Apple and Android devices and supports English and Spanish languages. It is compatible with ERP 10.2.400 and later, on the cloud and on-premise.

*Mobile Expense Management access is included with the Expense Management module. For more information, contact your customer account manager.*

# ERP for the Operations/Material Manager, COO

In the area of material management, Epicor ERP has introduced improvements designed to offer greater productivity, simplicity to improve worker efficiency and satisfaction, and more responsiveness to improve customer loyalty.

 Greater Productivity	 Worker Experience	 Customer Service
<ul style="list-style-type: none"> <li>▶ <a href="#">Epicor IOT*</a></li> <li>▶ Planning Contracts</li> <li>▶ Calculate Minimum, Maximum, &amp; Safety Stock</li> <li>▶ Standard Bartender Label/Report for Issuing Material and Receiving</li> <li>▶ Print Requisition Actions Menu Selection</li> <li>▶ MES Master Pack Shipment Entry &amp; Stage Ship Confirm</li> <li>▶ Purchase Order Taxes</li> <li>▶ Receipt Line Supplier Part Cross References</li> <li>▶ Material Request Queue/Material Queue Manager – From/To Warehouse Buttons, Paging, &amp; Filtering</li> <li>▶ Issue and Return Misc. Material Shows Warehouse Bins Grid</li> <li>▶ Kanban Consider Safety Stock in Monitors</li> <li>▶ Mass Updates Improvements to Existing</li> <li>▶ Part Transaction History Tracker Improvements</li> <li>▶ Time Phased Inquiry for Multiple Parts\Order Entry—Multi-Level Capable to Promise (CTP) for Kits</li> <li>▶ Product Configurator—Allow Recycling of MRP Jobs</li> <li>▶ Package Control Identification (PCID or License Plating) Full Expansion</li> </ul>	<ul style="list-style-type: none"> <li>▶ User Experience               <ul style="list-style-type: none"> <li>◦ Active home page (Kinetic framework)</li> <li>◦ Mobile User Experience</li> <li>◦ Epicor Web Access Touch Enabled</li> <li>◦ Social Enterprise</li> </ul> </li> <li>▶ Purchase Suggestion and Purchase Release Visibility Improvements</li> <li>▶ Purchase Order Change Suggestion Entry – Arrived Qty, On Order Qty, Comments</li> <li>▶ Default Supplier Ship Via</li> <li>▶ Skip Last PO Supplier</li> <li>▶ Supplier Tracker – From Order Date &amp; To Order Date Fields</li> <li>▶ Container Landed Cost Entry – Indirect Costs Fields</li> <li>▶ Landed Cost Improvements</li> <li>▶ <a href="#">Putaway</a> Transaction Priority</li> <li>▶ Physical Inventory Process &amp; Reporting Imp.</li> <li>▶ Handheld/MES Menu Security</li> <li>▶ <a href="#">DocStar ECM, an Epicor Solution*</a></li> <li>▶ <a href="#">Epicor Mobile Warehouse*</a></li> </ul>	<ul style="list-style-type: none"> <li>▶ Improvements in Supplier Management</li> <li>▶ BTO Purchase Release Promise, Due and Need by Dates</li> <li>▶ Supplier Wizard – RoHS Compliance Selection</li> <li>▶ Lot Management Simplified</li> <li>▶ Support for health Industry Barcode (HIBC) Used by FDA Regulated Businesses</li> <li>▶ In Transit Stock Report</li> <li>▶ Epicor Web Configurator (EWC)</li> <li>▶ Configurator Image Layering</li> <li>▶ <a href="#">Smart Inventory Planning and Optimization *</a></li> <li>▶ <a href="#">ECC Dealer Network Portal*</a></li> <li>▶ <a href="#">Sales Order Automation*</a></li> </ul>

## Top requested feature—Purchase Suggestion and Purchase Release Visibility improvements

Buyers have greater visibility and control over purchase suggestions to ensure the accuracy and timeliness of purchases. For starters, the Generate Purchase Suggestions process offers filtering criteria to enable filtering by part, part class, and product group. Additionally, buyers can specify that a suggestion has been reviewed with a new Reviewed checkbox. This helps manage buyers’ work in being able to segment between those suggestions they have reviewed and those that have not.

Likewise, buyers have greater visibility across purchase order releases and can more easily see the status of releases with new fields that are now available in the Purchase Order and PO Tracker.

- ▶ A new “status” indicator communicates the following statuses—Open, Arrived, Inspection, Received, Consumed, Drop Shipment, Closed, and Voided
- ▶ Other fields like Container ID, Container Promise Date, Container Due Date, and a Shipped/Not Shipped indicator are fields that offer related container shipment information when the PO release line is linked to a container shipment in the Container Landed Cost

## Top requested feature—Purchase Order Change Suggestion Entry—Arrived Qty, On Order Qty, Comments

Change Suggestions are great tools to understand how changes in the production schedule affect what is needed to buy. To reduce the effort and time needed to analyze Purchase Order Change Suggestions for buyers, the Change PO Suggestions detail now includes:

- ▶ Arrived Qty—purchases that have already arrived on the purchase order release
- ▶ On Order Qty—total quantity currently on order for this PO release that has not arrived or been received
- ▶ Comments—free form comment text to communicate analysis and actions for the PO suggestion

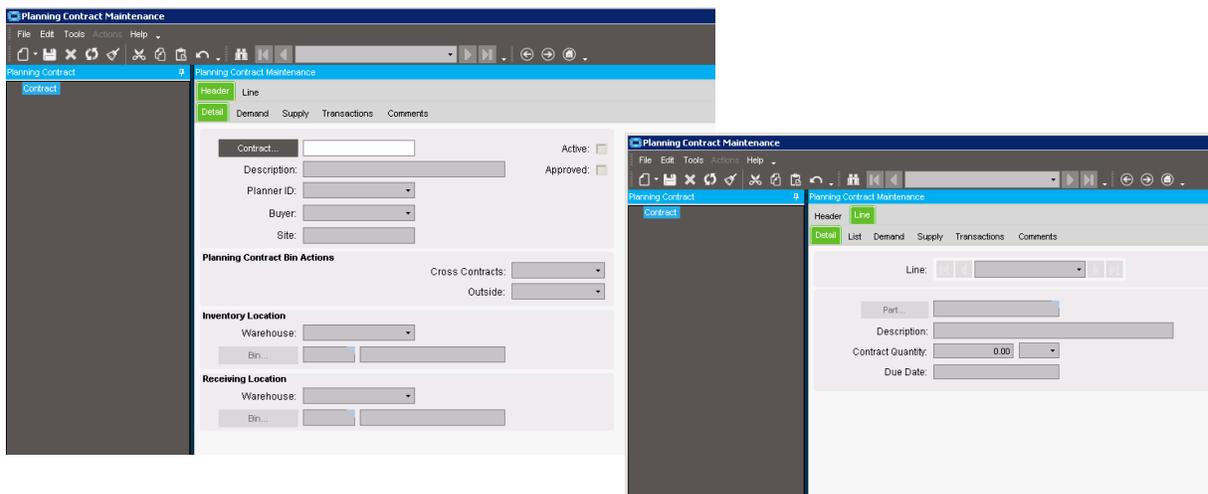
## Top requested feature—calculate Minimum, Maximum, and Safety Stock

Min Max Safety Mass update is a new function that allows users to perform two types of mass updates to part/site records—calculated and manual. One is to recalculate and mass copy updated Minimum, Maximum, and Safety Stock quantities based on usage history (Sales, WIP, or both). The second is a manual update and mass copying of Minimum, Maximum, and Safety Stock quantities to selected part/site records. mark

## Top requested feature—Planning Contracts

In previous versions of Epicor ERP, users in the Engineer to Order space had a particular demand condition that other manufacturers may have shared as well. Based on studying the specifications of an accepted proposal, they would need to buy certain high-value or long-lead-time items that would be specific to a job bill of material. However, the job that would hold the material requirement for such an item would be weeks or months away from being defined. This left the users with a couple of choices:

- ▶ Buy to Inventory—this would allow for a location and the visibility of an item, but this item could be appropriated to some other job or purpose that was not intended. The only controls on this would be procedural.
- ▶ Buy to Job—This would make sure that the cost of the part was accounted for in a job once it was received, but there was not visibility of the item in terms of location. Also, there was no real expectation that the job the item or items were purchased to would be the job on which they would be consumed. Jobs were sometimes raised for the express purpose of managing parts of this nature for large projects. Also, the parts could disappear, being used on some other job or shipped against a sales order with no transaction to show its disposition. Once the job that needs the item is actually



established, there will be another demand on the system to buy or make the part that is already on hand.

The solution to this is the Planning Contract. This is a “document” that creates legitimate demand on the system and allows users to define parts as managed by Planning Contract in terms of demand. The planning contract will also assist in managing items once they are brought into the system relative to the jobs or sales order releases on which they can be used.

Once the Planning Contract is established, users can add parts to the detail list. When the Planning Contract is approved, it represents actual demand records to be fulfilled. MRP and PO Suggestion process will recognize these demand records and create unfirming jobs or PO suggestions for these parts.

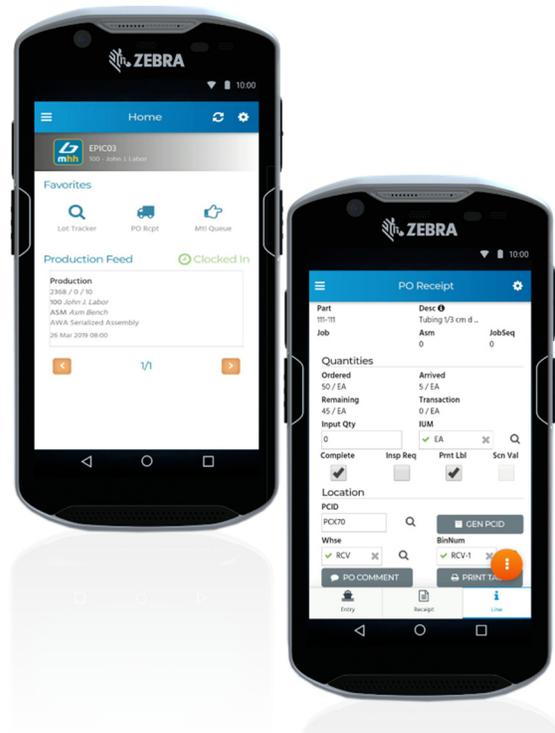
Part of the power of the Planning Contract is the control the user has over the transactions that are allowed once the parts are in the Planning Contract Bin Locations. The user can set Stop, Warn, or None for issue to job transactions or shipping transactions. The key is the Planning Contract code, and if it is part of the document that is to receive the part. For example, a user could set a Stop bin action on the Outside filed in the Planning Contract Header. This will prevent a part from being issued to a job as material unless that material record has the Planning Contract code on that record. Note that if the part is marked as Link To Contract as described above, the presence of that part on the job material does not create a new demand record.

## Top Requested Feature: Epicor Mobile Warehouse

Epicor Mobile Warehouse is the next generation handheld application, that offers a modern and intuitive user interface for warehouse and distribution functions. It optimizes workflow for fast and accurate scanning, improves time to process transactions, increases accuracy, and reduces errors. Download Epicor Mobile Warehouse from the Google Play Store. Epicor Mobile Warehouse runs on the latest Android devices and it's available in English. It is fully integrated with Epicor ERP and it's compatible versions 10.2.100 and later.

Epicor Mobile Warehouse features include:

- ▶ Modern and intuitive native android app
- ▶ Simple user interface
- ▶ Part level validation
- ▶ Bin level validation
- ▶ Configurable scan validation
- ▶ Complex sort and filter options
- ▶ Shortcut to favorites
- ▶ Scan events that trigger automated workflows



*Additional license and/or subscription is required for this solution. For these details, contact your customer account manager. This solution works with Epicor ERP 10.2.100 and later and is available in English and Spanish.*

## Top Requested Feature - Package Control Identification (License Plating)

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.

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.

# Epicor Smart Inventory Planning and Optimization platform

## Streamline your supply chain operation

While improving forecasting is a key process for your company, it is just the beginning. Doing business today requires a holistic approach to inventory management. The real value relies on using the forecast to drive inventory strategies. Epicor Smart Inventory Planning and Optimization platform is an integrated set of cloud-based applications for demand planning, inventory optimization, and supply-chain analytics that drives sales and inventory operations planning (SIOP). It offers a convergence of robust forecasting methodologies, optimization techniques, and consensus demand and inventory planning delivered via an easy-to-use interface accessible through any web browser.

## Flexible and scalable

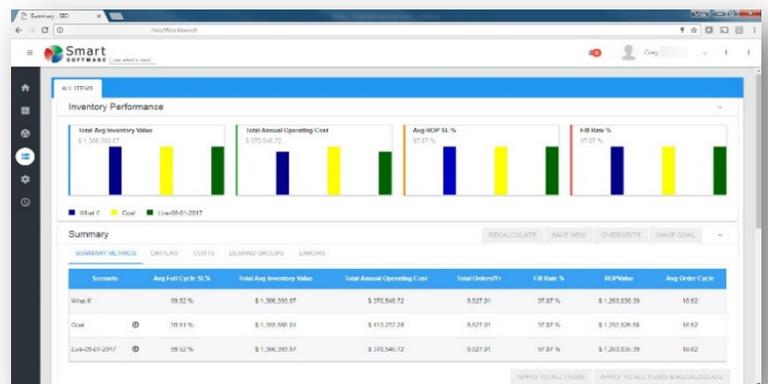
With the Epicor Smart Inventory Planning and Optimization platform, you can address a discrete set of supply-chain issues including demand planning, forecasting, inventory optimization, or inventory reporting initially with the opportunity to expand as your requirements grow. Epicor Smart Inventory Planning and Optimization integrates with Epicor ERP using an “out of the box” connector that simplifies module implementation and support. Each platform module operates under the same common data model, meaning that when you implement one module, you are implementing for all. No new data acquisition effort is required enabling you to seamlessly add new planning technology as your requirements grow.

## Smart Demand Planner

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

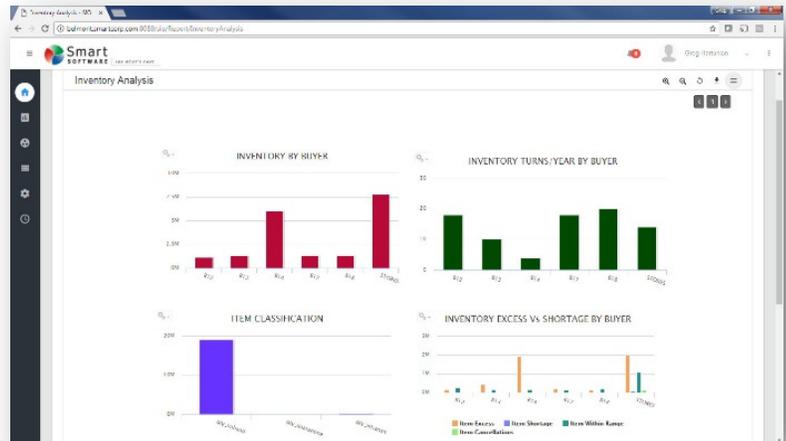
## Smart Inventory Optimization

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



## Smart Operational Analytics

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



Smart Software products require a subscription.

## Standard Bartender label/report for issuing material and receiving

Generating labels for materials that are issued or received is easier with a standard label or report to get started.

## Default supplier Ship Via

Easily specify the default way your supplier ships material to your receiving locations.

## Requisition entry—Print Requisition actions menu selection

Easily print a copy of your requisition with a new menu function for Print Requisition.

## Improvements in supplier management

Supplier performance is key to success and driving new efficiencies in the procurement process, and the latest Epicor ERP delivers new levels of responsiveness while closely managing costs. New Import/Export File is available to easily maintain Supplier Price Lists. Also, the solution provides greater controls in changing suppliers on existing purchase orders. Some of these features may replace existing BPMs you have written to perform these functions, which can simplify your upgrade planning:

- ▶ The system now prevents a supplier change once a release line is linked to a Buy to Order
- ▶ You have greater control over changes that involve approved suppliers to prevent selection of a non-approved supplier during a change
- ▶ For a contract purchase order, the system verifies that the new supplier has active part schedules defined in Part Schedule Maintenance

## MES Master Pack Shipment Entry and Stage Ship confirm

New function added to MES, Master Pack Shipment Entry, allows users to combine separate pack IDs (Master Packs) into one master pack group to ship as a single shipment. Also, State Ship Confirm is available to confirm shipments of staged Pack IDs or Master Packs.

## Warranty adjustments at shipment

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

## Drop shipment invoicing when complete

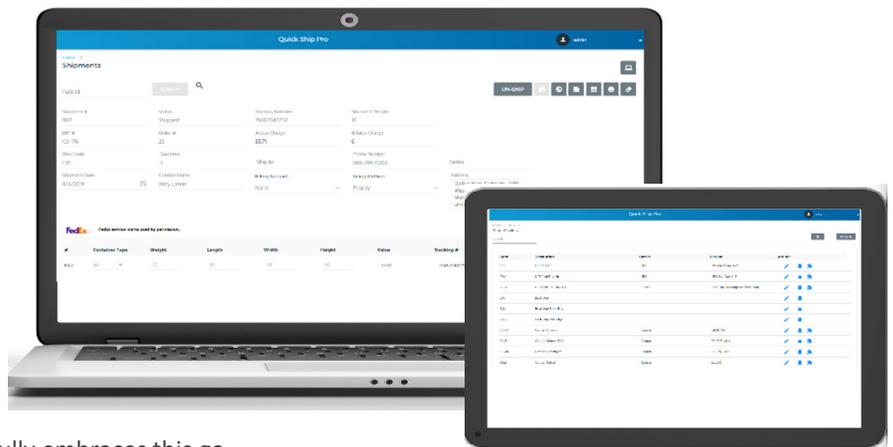
Many businesses want to preserve invoicing drop shipments until all order lines have been shipped complete. The check box “Invoice When Complete” located on the order now works with drop shipments.

## Quick Ship and Quick Ship Pro 5.0.0

Manifest is now Quick Ship Pro; in an earlier release, we introduced a simplified version of Manifest called Quick Ship. Quick Ship and Quick Ship Pro is an even more intelligent, easy to use shipping solution. This new version incorporates core shipping capabilities with the Epicor Kinetic Design System. This section describes the differences between the two versions.

### Epicor Kinetic Design System

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



### Blind Shipping

Customers are streamlining distribution activities and asking you to anonymously ship on their behalf. To meet this new business requirement, the Quick Ship Pro interface includes blind shipping capabilities.

Within Epicor ERP, users can specify Blind Shipping in Customer Maintenance. By selecting the Use Blind Shipping checkbox, you define which shipped from address Quick Ship Pro displays. During the freighting process, Quick Ship Pro displays the requested address on the shipping documentation.

### International shipments and Bill of Lading direct from Epicor ERP

To simplify launching Quick Ship Pro from Epicor ERP, two access points are in Shipment Entry on the International Shipments and Bill of Lading sheets. While users are on these sheets, they can launch Quick Ship Pro.

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

### BTO purchase release Promise, Due, and Need-by Dates

Buy To Order (BTO) purchases now received the following defaults once the order, line, and release from the sales order is entered.

- ▶ Due Date comes from the Ship By date of the order release
- ▶ Promise Date is pulled from the PO header or blank and you can enter one
- ▶ Need by Date comes from the Ship By date of the order release if the Promise Date is blank

### Company configuration—skip last PO supplier

In Generate Purchase Suggestions, the hierarchy for price selection is pulled first from a Primary Supplier, secondly from the last PO, and last from the effective supplier pricelist. A new option in Company Configuration changes the behavior of the application to skip the last PO if a price from the Primary Supplier is not available and use the effective supplier pricelist.

### Supplier Tracker—From Order Date and To Order Date fields

We have added a filter to specify the From Order Date and To Order Date to reduce the amount of orders being analyzed when either doing historical review of past purchases or to more easily see recent orders. Using this feature will improve performance of viewing both historical and more current orders with the supplier.

### Purchase Order taxes

Improve accuracy in inventory valuations with tax calculations at the time of purchase. Users can now calculate taxes on the Purchase Order. Tax calculations flow through to the invoice. Purchase order tax calculations are necessary for accurate cost accounting for tax-inclusive pricing. This is in compliance with legal requirements in numerous countries (e.g., GST in Australia) to support taxes in purchase orders, including reviewing, adjusting, and printing taxes in the Purchase Order forms. The new Purchase Order Tax Engine offers tax exclusive calculations for purchase orders for all collection methods including Invoicing, Withholding, Self-Assessment, and Self-Assessment Dual entry. Withholding is also managed, and there is a Tax Reconciliation Report option in AP to generate a revenue and expense report where the AP invoices are listed with tax details such as liability, tax type, tax code, and percentage. This will be useful in the event of a tax audit.

## Container Landed Cost Entry—indirect costs fields

Indirect costs can now be spread across container shipments. This improves accuracy in inventory cost and simplifies the accounting of these costs. This could be a cost associated with the shipment but not tied to the shipment that you want to allocate to the cost. An example of this cost would be a handling cost, border fees, or some tariffs.

## Landed Cost improvements

Landed Costs functionality offers new levels of simplicity, visibility, and control during processing:

- ▶ View important dates related to the container shipment during processing with Shipped, Shipping Days, Due Date, Need-by Date, and Promise Date fields displayed in Container Landed Cost Entry and Container Landed Cost Tracker
- ▶ New restrictions on deletions assure accuracy of entries while reducing the need for user BPMs to perform the checks
- ▶ Simplified receiving in Container Receipt Entry standardized workflow to perform similar to individual Stock and Job Material sheets
- ▶ Fields in Container Receipt Entry convey quantity Ordered, Arrived, Received, and Remaining for users for greater visibility

## Receipt Line Supplier Part Cross-References

Similar to the ability of the Epicor ERP system to recognize a part based on the customer's part number and translate to the internal part number, you can now receive a supplier part using the supplier's part number and using the part cross-reference, the system will recognize the receipt of the part. This Supplier Part Cross Reference capability is available in Receipt Entry and Container Receipt Entry.

## Supplier Wizard—RoHS Compliance selection

In Supplier Relationship Management (SRM), when using the Supplier Wizard to select suppliers for bid, Compliance can be selected to access a RoHS Compliance Picker where you can select the RoHS compliant restriction type you wish to include when performing the supplier search.

## Material Request Queue/Material Queue Manager—From/To Warehouse buttons, paging, and filtering

Within the Material Request Queue and Material Queue Manager, users can select multiple filters to focus efforts in specific areas of the warehouse. Also, new paging and filtering capabilities improve efficiency and visibility in the process. A byproduct of these features is an improvement in performance of queue viewing and transacting.

## Site configuration control—putaway transaction priority

New features allow the user to decide the priorities for putaway transactions within Epicor ERP. The following transactions can be prioritized with a "1" to deem them the highest priority.

- ▶ ASM-SKT—Return Assembly/Material Request on an Issues Subassembly

- ▶ INS-STK—Inspection Processing (Production Management/Quality Assurance) Request Move for Passed Inventory
- ▶ MFG-STK—End Activity on Last Operation of a Make to Stock with Request Move
- ▶ MTL-STK—Return Assembly Material Request (Material Management/Shipping and Receiving/Advanced Material Management)
- ▶ PLT-STK—Receive Transfer Order (Material Management/Shipping and receiving)
- ▶ PUR-STK—PO Receipt to Stock/Miscellaneous Receipt to Stock

## Lot management simplified

New features in management of lots help simplify maintaining and tracking lot numbers and lot tracked parts. In particular, there is a new company configuration to enable User Job Number as a Lot Default. Also, the Slow Moving Stock Report will only consider lot tracked transactions. A Staging Lot Number specifies a lot number of the material in the Staging Warehouse/Bin.

## Physical inventory process and reporting improvements

Greater flexibility and oversight in processing full physical and cycle inventories enable greater control over inventory:

- ▶ A new report for Count Variance Calculation/Report provides greater visibility in Physical count cycles to variances
- ▶ New options in Cycle Count Schedule Maintenance offer capabilities to delete all scheduled cycles you created and undo (reverse and delete) an initial selection of parts made after running the Perform Part Selection option

## In-transit Stock Report

A new report to assist in management of in-transit materials, the In-transit Stock Report offers detailed information about materials moving on transfer orders between specified outbound and inbound locations, or those transfer orders you have already received in their specified inbound locations. It reports the quantity and total cost value of in-transit materials for audit purposes.

## Issue and Return Miscellaneous Material shows Warehouse Bins grid

The UI for both Issue Miscellaneous Material and Return Miscellaneous Material has improved workflow with greater Warehouse Bin visibility, similar to the Quantity Adjustment form.

## Kanban Consider Safety Stock in Monitors

A new color-coding scheme in Kanban Monitors offers visual cues to critical inventory quantity balance conditions, including Safety Stock:

- ▶ Complete Yellow Line—Used if the quantity on hand for the Kanban controlled item (in the warehouse bin location) is between the Minimum Quantity and the Safely Stock Quantity
- ▶ Complete Red Line—Used if the quantity on hand for the Kanban controlled item (in the warehouse bin location) is equal to or less than the Safety Stock quantity
- ▶ Yellow Qty on Hand and Request Level—This visual cue appears on Qty on Hand and Request Level fields in Kanban Bin Monitor sheets if the quantity on hand for the Kanban controlled item in a warehouse bin location is greater than the quantity specified in the Request Level field for the item/warehouse bin location

## Mass updates—new options and improvements to existing

Functions in mass inherently improve efficiency. Improvements in these functions offer greater visibility in the process while streamlining the user experience for greater performance. Below are improvements in these functions:

- ▶ In Mass Issue to Manufacturing, new rules for users control the issue of line items that will go negative, reducing the need for user-built BPMs. Also, the UI has been improved to offer selection of items to issue with the ability to issue the selected items with a single button.
- ▶ Mass Return to Manufacturing is a new function that allows user to return the already-issued job material from the job (Productions Floor) back to stock.
- ▶ Min Max Safety Mass update is a new function that allows users to perform two types of mass updates to part/site records—calculated and manual.

## Support for Health Industry Barcode (HIBC) used by FDA-regulated businesses

This product code is intended for medical devices that you distribute throughout the United States. This code allows you to apply a unique device identifier to these medical devices, as required by the FDA. You can enter up to 25 characters for a HIBC product code.

## Part Transaction History Tracker improvements

Part Transaction History Tracker has been added as a menu item under Inventory Management > General Operations. Improvements in the Part Transaction History Tracker offer an explanation of the transaction through a new Reason Code field that displays a description of the reason for the transaction. Also, users can specify a starting date and select “retrieve” to display part transactions that contain a transaction with a date on or after the specified start date.

## 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          | ▶ Master Pack Shipment Entry     | ▶ Receive Transfer Order         |
| ▶ Container Landed Cost Entry   | ▶ Miscellaneous Shipment Entry   | ▶ Requisition Entry              |
| ▶ Container Landed Cost Tracker | ▶ Miscellaneous Shipment Tracker | ▶ Requisition Tracker            |
| ▶ Container Receipt Entry       | ▶ Price List Maintenance         | ▶ RFQ Entry                      |
| ▶ Customer Shipment Entry       | ▶ Receipt Entry                  | ▶ Service Call Center            |
| ▶ Customer Shipment Tracker     | ▶ Tracker                        | ▶ Subcontractor Shipment Entry   |
| ▶ Demand Contract Entry         | ▶ Receive Transfer Order         | ▶ Subcontractor Shipment Tracker |
| ▶ Demand Entry                  |                                  |                                  |

- ▶ Drop Shipment Entry
- ▶ Forecast Entry
- ▶ Requisition Entry
- ▶ Tracker
- ▶ Transfer Order Entry
- ▶ Transfer Order Shipment Entry
- ▶ Transfer Order Shipment Tracker

## Stock Status reporting

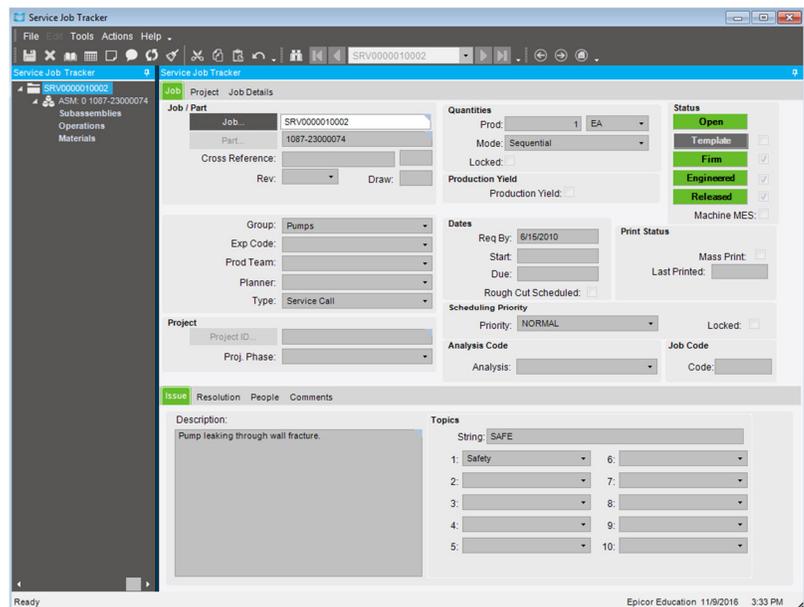
The Stock Status report now offers new filters for warehouses, part classes, and part numbers. Also, a Weighted Average Cost option, when selected, designates that a weighted average cost should print for all parts on the report, regardless of the setting of the Costing Method for the part.

## Time Phased Inquiry for multiple parts

In the Time Phased Inquiry program, you can navigate across multiple parts. You can retrieve more than one part using the Part search and navigate through them using the VCR buttons or the Tree menu.

## Service Job Tracker

A new Tracker manages Service Jobs.



Improve visibility and management of service jobs with the Service Job Tracker

# ERP for the Accountant, Controller, CFO

In the area of financial management, Epicor ERP has introduced improvements designed to offer greater accountability, improve the efficiency and satisfaction of today’s workers, and—as with each release of Epicor ERP—help ensure regional and international compliance requirements both regionally are met. Epicor ERP 10.1 delivers on all of these. One key feature to acknowledge is the new bank reconciliation capabilities. There are also multiple budgets and deferred accruals. To simplify user workload, there are extended attachments that let you attach your Excel file to the journal entry, a streamlined sub-ledger reconciliation, as well as supplier multiple remit-tos. Epicor continues to expand our country offerings and meet the financial accounting standards required to do business globally.

Greater Accountability	Simplicity	Global Readiness
<ul style="list-style-type: none"> <li>Bank Statement Processing</li> <li>AR Reconciliation Report / Tracker</li> <li>Periodic consolidation delta and retrospective Adjustment</li> <li>Multiple budgets and import / export</li> <li>Non financial data support</li> <li>AP/AR Edit List currencies</li> <li>AR Stronger Customer Credit Management</li> <li>Supplier Statement Report</li> <li>PO and Invoice Tax Calculations</li> <li>Print AP Debit Memos</li> <li>Deferred expenses</li> <li>Cash Receipt Tracker</li> <li>Revenue Recognition by WBS Phase</li> <li>Percentage of completion (POC) Rev</li> </ul>	<ul style="list-style-type: none"> <li>Asset Revaluations</li> <li>AP Partial Invoicing</li> <li>Multi-Company GL Allocations</li> <li>AR Controlled Credit Memo Entry Option</li> <li>AR Negative Amounts Options</li> <li>AP Inactive Supplier Invoice Controls</li> <li>Automatic Matching of AP Payments and AR Payments for Select Countries</li> <li>Positive Pay*</li> <li>MICR Check Print*</li> <li>Lockbox*</li> <li>External Payroll Integration*</li> <li>Epicor Data Analytics*</li> <li>Mobile Expense Management*</li> </ul>	<ul style="list-style-type: none"> <li>Consolidate shipping details</li> <li>Select invoice in Payment Entry</li> <li>Automated removal of credit hold</li> <li>Reverse misc cash receipts</li> <li>HCM Pay Hours integration</li> <li>AR Adjust/Write off Cash Receipt</li> <li>AR Invoice Entry – Delete Multiple Invoices</li> <li>Customers and Suppliers in GL Journals</li> <li>ACH Electronic Payments for Automated Payments and Collections</li> <li>AR Remittance Slips</li> <li>General Ledger Report for Single Account</li> <li>DocStar ECM, an Epicor Solution*</li> <li>Epicor® Payment</li> </ul>
		<ul style="list-style-type: none"> <li>Global CSFs for 32 Countries worldwide</li> <li>Global COA</li> <li>Multi-company Allocations</li> <li>US 1099 support expanded, TIN Validation, and New 1096 Form</li> <li>Non recoverable taxes</li> <li>Epicor Tax Connect Global</li> <li>Electronic Compliance Engine*</li> </ul>
		*New Modular Functionality

## Top requested feature—AP partial invoicing

In some cases, you may have noticed that suppliers’ systems and processes invoice more than one invoice per shipment. This can be difficult to manage and keep traceability in line with supplier expectations. To assist, in the Accounts Payable module of Epicor ERP, you can now enter more than one invoice against a receipt line. The non-invoiced quantity will be available for selection on future invoices and will be properly reflected on the AP Received Not Invoiced Report.

## Top requested feature—Bank Statement Processing

Bank Statement Processing allows you to create a new bank statement either via import of electronic statement files from the bank into Epicor ERP or via manual entry of new bank statements and statement lines, review the information, search for the Epicor transactions available for matching or create new transactions. You can perform bank reconciliation in automatic (using reconciliation algorithm) and manual (matching the transactions to statement lines) modes. The base system allows for incorporation of custom programs to support individual bank

formats, and includes generic templates for camt.053, MT940, and .csv files. The main functions of Bank Statement Processing include the following:

- ▶ Import an electronic bank statement or manually create a new statement
- ▶ Automatically match unmatched transactions to the statement lines—the line statuses icons help you to quickly review the results of automatic matching
- ▶ Quick ("one-click") manual matching of existing transactions to the statement lines
- ▶ Quick search of partners by a partner name (identifier) during reconciliation
- ▶ Automatic creation of new transactions
- ▶ Manual creation of new transactions

### Top requested feature—AR reconciliation report/tracker

With this report, you no longer need to use multiple reports and trackers to reconcile your AR balances. The report includes opening balances and displays movements for both the sub-ledger and GL. The report is run by fiscal year/period and GL book. It can be grouped by GL account or document. There is also a tracker that can be used to drill into the records.

### Top requested feature—add attachments in GL Journal Entry

You can add attachments to journal headers and individual journal lines in GL Journal Entry. You can also retrieve and view the attachments in the Journal Tracker, Journal Detail Tracker, and Chart Tracker. This is particularly useful for cases where a manual journal is needed as a result of an incorrect posting, and you want to attach the original journal edit list as a reference.

### Top requested feature—Periodic Consolidation Delta and Retrospective Adjustment

The Periodic Consolidation Delta functionality enables financial controllers to consolidate results from a fiscal period, and then restate those results after adjustments have been made by posting the net change (delta) for each account. This allows for timely initial consolidations, then corrections to final balance, without the need for manual adjustments or complete reversal and restatements. Also, you can apply consolidation amendments to previous periods, via Retrospective Adjustment.

### Top requested feature—multiple budgets support and import/export capabilities

Multiple-budget functionality allows you to create multiple budgets against the same GL book. It allows you to track budgets based on different calculations (for example, based on different forecasts). Also GL trackers can display budget amounts from multiple budget codes. Speed up the budgeting process in the Epicor system with the ability to import budgets into Epicor from the Epicor Financial Planner (EFP).

### Top requested feature—non-financial data support

Non-financial data support allows you to keep non-financial statistical or quantitative data, such as employee count and warehouse footage, against GL accounts. Statistical data support also allows you to choose whether the

account is purely statistical or to keep both types of data, financial and non-financial. Non-financial data support includes the posting of data against a statistical account in the form of a manual journal entry.

## Top Requested Feature: Revenue Recognition by Work Breakdown Structure Phase

Greater revenue to cost visibility in long-running projects provides stakeholders with timely financial information to adjust and ensure project profitability. This is especially true for multiphase projects, where costs are incurred within the work breakdown structure (WBS) phases; you need to visualize the profitability of each phase. In prior releases, you accomplished this by creating multiple projects that required additional work to generate the desired results. Introduced with this release, you can now not only recognize revenue at the project level but also optionally recognize the profitability of each phase. Then for even greater financial granularity, users can define phase level GL Control codes for use when the revenue is recognized.

This release also includes a project Root Phase. The Root Phase is the highest level of the project hierarchy; all other phases sit below it. This root phase can display costs and revenue directly tied to a project without referencing a WBS phase(s). Users can also optionally recognize revenue at the root.

### New Report Edit List for Capturing Project and WBS Phase Revenue

If financial results don't match expectations, reviewing before you capture these results saves time and effort. Once you produce General Ledger journals that recognize revenue for an ongoing project or WBS phase, run either the WBS Phase Revenue Recognition Edit List or the Revenue Recognition Edit List. Use these reports to see both the revenue recognition calculations and the posting accounts before capturing the calculated revenue for the project or WBS phase. You can then determine whether you need to edit these amounts before you capture them.

## Top Requested Feature: Percentage of Completion (POC) Revenue Recognition Methods

Managing long-running projects to ensure profitability is difficult. Epicor ERP now offers three new industry standard percentage of completion (POC) methods for recognizing revenue. These three methods assist matching activity and investment to profitability:

- ▶ POC Cost-to-Cost: Benefits organizations where significant capital investments, such as material, design, and equipment are made at the beginning of a contract. Recognizing revenue against this investment helps more accurately see the profit to cost. The revenue is recognized by dividing all costs posted to date on a project or job by the total estimated cost amount incurred for that project or job.  
$$POC = (Total\ Actual\ Cost / Total\ Estimated\ Cost) * Contract\ Amount.$$
- ▶ POC Efforts (Expended): Beneficial for long-running contracts where production spans multiple months and products are finished but not fully delivered until the end date. This method captures how much effort has been expended to date and compares it to the total effort expected for the entire contract.  
$$POC = (Actual\ Quantity\ to\ Date / Budget\ Total\ Quantity) * Budget\ Billing\ Amount$$
- ▶ POC Units-of-Delivery: Designed for long-running contracts where units are delivered in batches.  
$$POC = (Delivered\ Qty) / (To\ be\ Delivered\ Qty) * Contract\ Amount.$$

## AP/AR Recurring Invoices/Vouchers

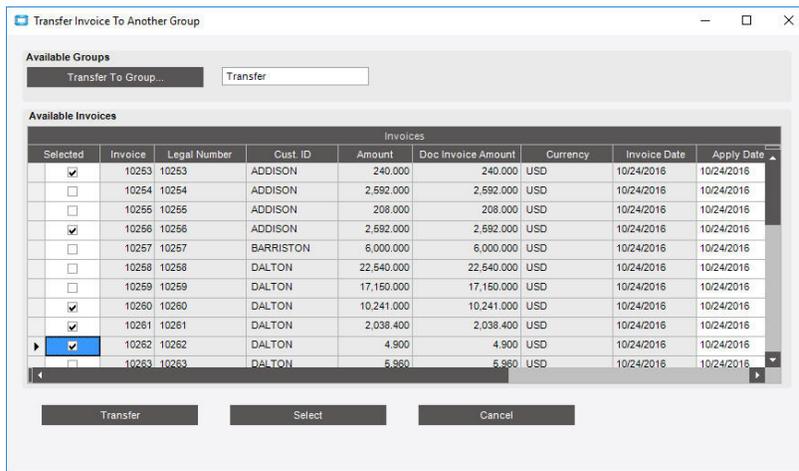
If you have invoices in AP for the same products or services that occur on a specific schedule, you can use the functionality to recreate them automatically based on specified parameters. You will not have to manually create such invoices. Likewise, if you have invoices in AR for the same products or services, which occur on a specific schedule, you can use AR Recurring Invoices functionality to recreate them automatically based on specified parameters.

## AP/AR Edit List Currencies

Both the AP and AR Edit Lists optionally show both the base and document currency.

## AP/AR transfer multiple invoices

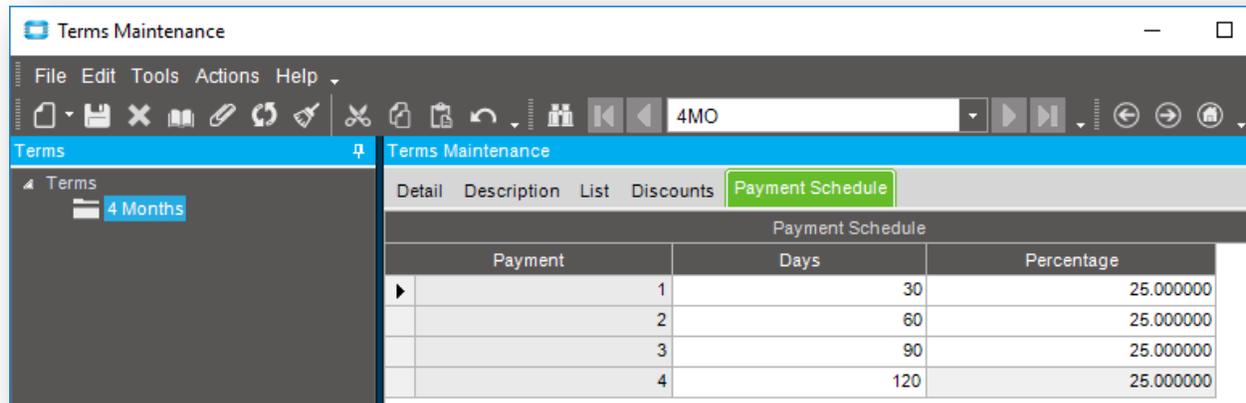
Transferring invoices between groups can be tedious and time-consuming when moving many invoices at a time. The Transfer Invoice option now has the ability to move all selected invoices at once. You can also modify the Apply Date on the grid for each individual invoice.



Easily select invoices to transfer from one group to another

## AR / AP Payment Schedules

Payment schedules for both AR and AP have been enhanced to allow greater flexibility and templates for customer and supplier invoices. This will allow users to cater to their customer needs by offering partial payments over a period of time to settle invoices. On the AP side, users now have the flexibility to modify their AP payment



schedules to match the supplier invoices, which can increase cash on hand. The payment schedules can be defined on the sales order and will flow through to invoicing. They can also be modified after invoicing in case changes need to be made.

## AR Stronger Customer Credit Management

Proactive management of customer credit helps improve days sales outstanding (DSO) metrics and optimize cash flow for the business. Automation in managing customers with outstanding invoices will reduce the work of credit managers and improve overall credit management. Some key features that were added in 10.2.200 include the ability to now put customers, orders, and unposted miscellaneous invoices on hold based on aging limits, provide greater visibility of credit conditions in the Customer Credit Manager, and subject unposted miscellaneous invoices not tied to shipments to credit actions. Financials-based businesses who don't follow the order-ship-invoice process in Epicor ERP will now be able to manage customer credit. See below for details on these features:

- ▶ Use credit and aging checking functionality to place unposted miscellaneous AR invoices on credit hold if their customers are placed on credit or aging hold and remove them from hold when payments are received.
- ▶ New hold criteria based on aging—rather than just credit limit—expands the ability to tightly control credit and automate putting customers, customer orders, and unposted miscellaneous invoices on/off hold if they surpass established aging limits. You can also manually put a customer on/off Aging Hold.
- ▶ Aging Hold codes determine the criteria for hold and are applied at the customer level. This allows the different treatment of customers based on your relationship with them. Default aging codes are available for new customers and can be applied to existing customers when established. Credit Hold still exists and a new field for Aging Hold has been added to the customer record, the order, and the unposted miscellaneous invoice.

- ▶ Customer Credit Manager Invoice list includes new fields for greater visibility and management of outstanding invoices.
  - Aging Days—The number of days the invoice is overdue, starting at 1 on the day after the invoice due date. It also displays the aging days for credit memos.
  - Credit Hold—If selected, the unposted miscellaneous invoice is on credit hold.
  - Block Aging/FinChg—Users can flag invoices in dispute so that they are not automatically put on aging hold when the Mass Credit Information Update Process runs. Also, finance charges won't be calculated against the invoice.
- ▶ Buy to Order sales order lines on aging or credit hold receive a warning or stop message in Purchase Orders and Purchase Suggestions to prevent or alert against purchases.
- ▶ Task List Entry includes customer on Aging Hold messages when you select a customer on Aging Hold.
- ▶ Generic import process has been updated to import AR Invoices based on the Credit/Aging Limit Actions defined in Company Configuration.

## AR Adjust Cash Receipt

A new feature in Epicor ERP 10.2.200, Adjust Cash Receipt makes it much easier to fix mistakes made during the Cash Receipt process. This is sure to save you time, however, adjustments are limited to changing the invoices allocated or customers allocated.

The Reverse Cash Receipt function will still be needed for adjustments that include amount, currency, bank account, bank fees, or taxes manually added to the cash receipt.

Limitations for the Adjust Cash Receipt function include:

- ▶ Cash receipts that include debit notes, write offs, or credit card payments
- ▶ Cash receipts with a receipt withholding amount
- ▶ Miscellaneous cash receipts
- ▶ Deposit cash receipts
- ▶ Cash receipts cleared by the bank reconciliation process
- ▶ Cash receipts paid using Electronic Interface

## AR Write-offs Via Cash Receipt Entry

From within Cash Receipt Entry, users can now perform a writeoff on an invoice at the time of receiving. This is beneficial in particular when a customer short pays due to confusion in discounting rules. Rather than leave an invoice out there with a nominal amount, the user can use a writeoff to close out the invoice.

Administrators can determine the Maximum Amount per Invoice to write off, offering a check and balance in write offs. It is also a function to specify whether the system will allow negative write-offs. This feature enables invoice to be increased through a negative write-off.

Comments to identify the reason for the write-off are available in addition to how the write off will handle any taxes.

## AR Print Date, Time, and Copy Number in AR Invoices and Credit Memos

AR Invoices now offer the ability to print the time and date of printing the invoice along with a designation for the version or “copy” of the invoice. If the same invoice is printed multiple times, a “copy” version is included and managed automatically by the system. New functionality also offers the ability to print a “draft” version that includes the following language to ensure it is not used commercially:

- ▶ DRAFT COPY instead of Invoice/Credit Memo
- ▶ INTERNAL USE ONLY—NOT SUITABLE FOR TAX PURPOSES
- ▶ The copy number, invoice number, legal number, and customer's tax ID are not printed

## AR Invoice Search—Created By

Built for AR departments where more than one person is generating invoices on a daily basis, the system now offers the ability to sort and search invoices by who created them. This is particularly useful when maintaining invoices you generated recently and just need to step in to tweak or review.

## AR Tax Timing for Advanced Billing or Direct Deposits

Use Tax Timing for Advanced Billing or Deposit Invoices functionality to determine different tax timing when creating and posting advanced billing and deposit invoices. Because of the different ways tax liability is handled in different countries, some companies in countries such as Germany and Malaysia need the ability to deduct VAT calculated for advanced billing or deposit invoices using different tax timing than the timing used in the final AR invoice for the sales order.

## AR Controlled Credit Memo Entry Option

Close management of credit memos ensures credits don't exceed debits in the process. A new option offers the ability to have Controlled Credit Memo Entry, which limits the ability to create credit memos referencing sales order lines or invoice lines so they cannot be greater than the ordered, shipped, or invoiced totals for that order line.

## AR Negative Amounts Options

A new powerful option can prevent entry of negative discount amounts and negative quantity in AR invoice lines at the company level.

## 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.

## AP Payment Withholding Taxes base on Invoice Tax Categories

Making it easier to manage tax obligations, Epicor ERP now applies Product Tax Category rates and exemptions when calculating Withholding Tax for AP Invoices and Payments. For tax codes that have payment timing set up, the system calculates withholding tax at the time of invoicing and saves cumulative tax information, so the invoice taxable amounts and rate codes are used at the time of payment eliminating the need of tax calculation for all invoice lines of the invoices included into the payment. Taxes can still be recalculated depending on the setting of the Tax Rate for Withhold tax based on field in Company Configuration and if the new effective rates are available.

## AP Inactive Supplier Invoice Controls

For businesses where invoices—or vouchers—for goods and services are leveraged outside of the Epicor ERP purchase order process, the check for active supplier status in previous releases wasn't done—resulting in costly errors. Epicor ERP now offers a warning when an AP clerk creates an AP invoice or logged AP invoice with an inactive supplier. Also, they will receive error messages when trying to add miscellaneous invoice lines.

## Due Date adjustment in AP invoices

This feature improves flexibility in managing supplier disbursements. The AP Invoice Due Date field can be adjusted in case there is only one payment set for the invoice terms—no need to post it first.

## Payment Proposal Report filters and totals

The Payment Proposal Report has new filters and totals to make the analysis easier to understand and manage suppliers and cash expectations. Users can filter by Currency, Payment Method, Supplier Group, and Supplier. Also, totals are now available for Gross Payment, Discount, Net Payment, and Number of Payments.

## Supplier multiple remit-tos

You can now define multiple bank or remit-to addresses on suppliers.

## Usability Enhancements in Void Payment Entry

New search capabilities have been added to Void Payment Entry. You can now simply enter the Payment Number in the corresponding field and void the payment. If a duplicate payment number is found, you will get a warning to review and proceed when ready.

## Sorting in Check Register Report

New sort options are now available in the Check Register Report. Users can sort by Payment Date, Payment Number, Supplier, or any combination of these available options.

## Supplier Statements Report

The Supplier Statements Report is a new report that can be used to improve dispute results by providing a review of invoice transactions and balances up to a specific cut-off date for a supplier. Users can easily then send the Statement of Account to the supplier for confirmation and agreement.

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Epicor Education  
12600 S Torrence Ave  
Chicago IL 60633  
USA

Phone:  
Fax:

**Supplier Statement**

Hades Heat Treating  
1300 S. Lakeshore Drive  
Chicago IL 60605  
USA

Balance As Of 10/31/2016

Supplier ID: HADES

Invoice	Type	Invoice Date	DueDate	PO/Ref	Amount	Balance
HADES816	Invoice	4/1/2010	5/1/2010		875.00 USD	875.00 USD
5768796	Invoice	6/8/2010	7/8/2010	PO:4121	8,048.25 USD	8,048.25 USD
5372768-1	Invoice	7/2/2010	8/1/2010	PO:4029	570.00 USD	570.00 USD
5372768-2	Invoice	8/2/2010	9/1/2010	PO:4029	570.00 USD	570.00 USD
123456789A BC	Invoice	10/24/2016	11/23/2016		1.00 USD	1.00 USD
<b>Total Balance:</b>						
					Total in USD:	10,064.25

Easily manage supplier disputes with a Supplier Statement Report

## Purchase Order and Invoice (Voucher) tax calculations

This feature set is designed to simplify accounting for taxes on invoices. Tax-inclusive pricing is available for both purchase orders and purchase invoices. Tax calculations are necessary for accurate cost accounting for tax-inclusive pricing, as inventory should be recorded excluding recoverable taxes. This is in compliance with legal requirements in numerous countries (e.g., GST in Australia). There is a Tax Reconciliation Report option in AP to generate a revenue and expense report where the AP invoices are listed with tax details such as liability, tax type, tax code, and percentage. This will be useful in the event of a tax audit. For Purchase Orders, full tax calculation functionality is available.

## Revenue Recognition—Non-Reimbursable Expenses

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

## Consolidate shipping details

Use “consolidate the shipment” lines for the same part, same order line, and same packing slip for a customer into one invoice line. The consolidation happens if shipped from different warehouses, bins, or lots.

## Print AP Debit Memos

Epicor ERP users can now easily print AP Debit Memos when suppliers request a copy to recognize the credit.

Page: 1 / 1

### Debit Memo

Epicor Education 12600 S Torrence Ave Chicago IL 60633 USA	Invoice Number: R1001-1 Legal Number: Invoice Date: 10/24/2016
---	--

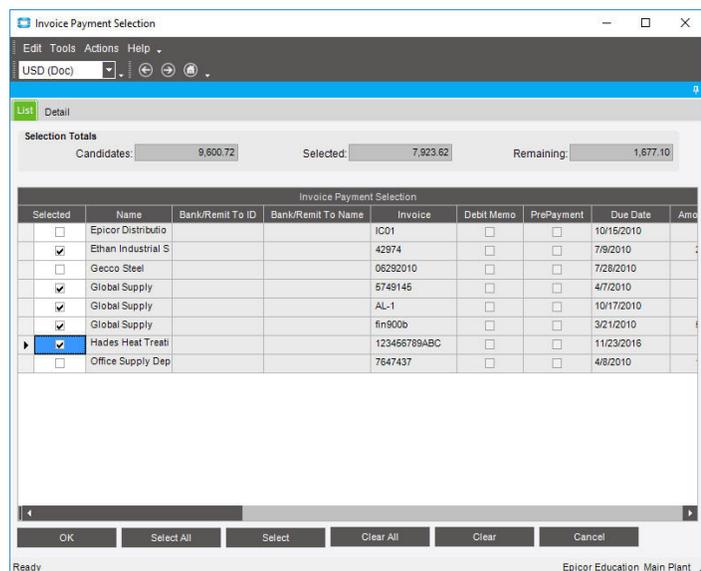
<b>Supplier:</b> Seaside Steel 3500 Pan American Drive Miami FL 33133 USA	<b>Terms:</b> Due Date: 10/24/2016 Ref. Invoice Number: R1001-1 PO Number:
---	---

Part No.	Description	Quantity	Price	Misc Charges	Total
TS-CR-RD-600/475	DMR 1001-1	-1.00 FT	550.00	0.00	-550.00
<b>Subtotal:</b>					<b>-550.00</b>
<b>Header Misc Charges:</b>					<b>0.00</b>
<b>Taxes:</b>					<b>0.00</b>
<b>Total:</b>					<b>\$ -550.00</b>

Produce a Debit Memo for suppliers to expedite credits

## Select invoices in Payment Entry

New levels of simplicity and usability are available in Payment Entry. This functionality offers users the ability to select invoices to pay. Users no longer need to use the Ctrl key to select multiple invoices. The Selected checkboxes are available and ready for use. A Selected field summary displays the correct total of the selected invoices as each invoice is selected and cleared.



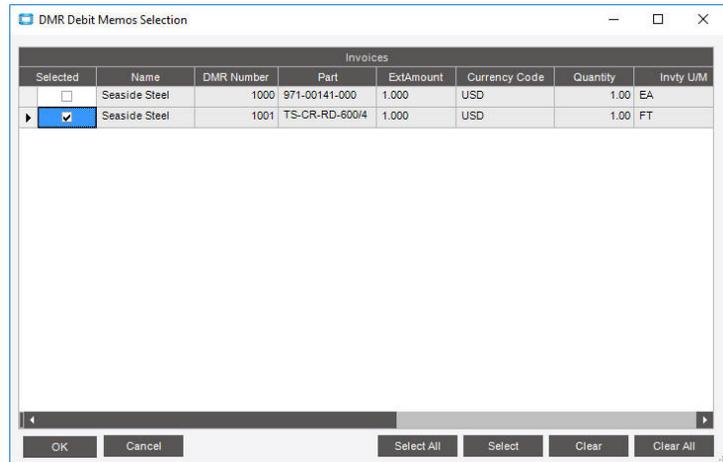
Easily select invoices to pay with complete visibility of value of solutions

## Deferred Expenses

Your organization may often receive AP invoices from suppliers, which will need to be apportioned over one or more fiscal periods. You can apportion these costs into the periods where these will be recognized using a single AP entry process. Epicor ERP will then create the journal entries to ensure that the portion of the costs is posted into the correct period. In addition, functionality exists to define amortization schedules and recognize deferred expenses for a selected amortization period, including reports for Deferred Amortization Forecast Report and Deferred Expense Reconciliation Report.

## Select DMR Debit Memos for invoicing

More control over invoicing DMR Debit Memos enables users to select the debit memos to invoice, unlike in previous releases where all were pulled in and invoiced automatically. If a DMR Debit Memo was in dispute or not ready for invoicing, the user would need to delete the created invoice.



Select which DMR Debit Memos should have invoices generated

## Automated removal of credit hold

Improve customer loyalty by improving the performance at which credit managers can update credit hold status for customers. A new process for Mass Credit Information Update can be run after cash receipts have been entered or scheduled to be periodically run for specific customers or groups of customers. Taking a customer off credit hold proactively reduces the noise of dealing with exceptions and improves the ability of sales staff to take that next order.

## AR Invoice Entry—Delete Multiple Invoices

AR Invoice Entry now allows you to delete multiple invoices at once instead of deleting them one by one. This is extremely helpful in the event you've pulled in more invoices than you intended to post within your group.

## Reverse Miscellaneous Cash Receipts

New flexibility allows users to reverse a Miscellaneous Cash Receipt that was perhaps a mistake or later determined was allocated incorrectly.

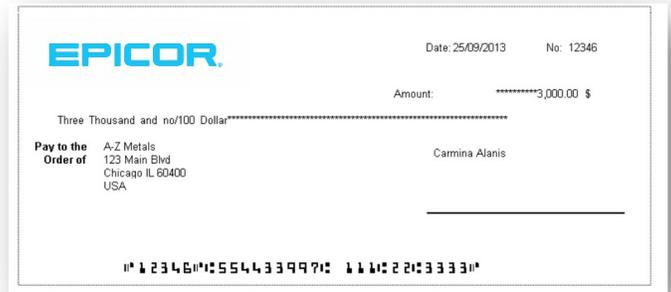
## Cash Receipt Tracker

The Cash Receipt Tracker has a standard Epicor user interface, replacing the dashboard format in previous versions. This provides greater ease of use. The tracker is structured in a similar way to the Cash Receipt Entry program, with separate A/R Receipt, Deposit, Credit Card, Misc, and GL Transactions sheets. As well as providing simple navigation, the tracker enables users to view, open, and retrieve files attached to cash receipts.

## MICR Check Printing

The majority of companies utilize magnetic ink character recognition (MICR) checks. MICR is the printed line commonly found at the bottom of a check that includes the key information about the check writer's financial institution including check number, bank routing number, and account.

Along with following the compatible printing hardware and fonts from the American National Standards Institute (ANSI) and American Bankers Association (ABA) or Canadian CPA 006 Banking standards, the Epicor MICR Industry Extension gives you the ability from Epicor ERP to print MICR lines, company logos, and electronic signatures on blank check stock. This allows you to print MICR checks without needing a preprinted check stub saving you the expense of bulk printing fees and more expensive preprinted check paper stock.



With MICR Check Printing functionality, you can print the checks you need, when you need them, right from an interface within Epicor ERP. Simply choose MICR as the payment method and use your own check stock to produce professional looking checks customized to your business. Contact your customer account manager for details. Additional licensing is required for this solution.

## Positive Pay

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.

The Positive Pay solution helps save time when issuing checks and protects against altered or fraudulently issued checks. If your bank is not currently represented or you need further details, contact your customer account manager. Additional licensing is required for this solution.

## Lockbox Processing

Lockbox banking is a service offered to organizations by commercial banks that simplifies the collection and processing of account receivables by having their customer payments mailed directly to a location accessible by the bank. The Epicor Lockbox functionality is ideal for companies with large volumes of cash receipt transactions as it automates the cash receipt process from bank files to Epicor ERP, eliminating the need for manual entry and verification.

The Lockbox feature set transfers cash receipts from bank files to the Epicor ERP Financials modules. By using Epicor ERP Lockbox capabilities, you can map the fields provided by your bank with the fields required to create the cash receipts in Epicor ERP. This enables you to configure how the module will operate based on your specific needs and eliminates the need for further customization or modifications to the file layout. In addition, the

Lockbox solution provides the option for multiple layouts in case you work with various banks and lockboxes that have varying layout requirements.

Once the layouts are determined, you can create cash receipts and automatically post them in Epicor ERP. The cash receipts are first categorized as either those that ran without any errors and can be automatically posted or those that need to be reviewed prior to posting due to some type of anomaly or error. For those categorized without errors, you can configure the system to bypass any review process while the other group will need to be reviewed prior to posting. This saves the users time and allows them to focus on outlier checks that may have faulted or were marked as not being able to post. These categories are also helpful as the Lockbox functionality will try to load as many checks as possible creating very few cases when a check completely fails and needs to be reloaded.

Upon posting, the Lockbox also validates the bank file data by comparing the actual check amount to what is declared in the record file to confirm it was not corrupted during transmission and that the number of lines and batches match with the number of lines declared. All of these measures help promote accurate and efficient transfers with minimal manual entries. Contact your customer account manager for details. Additional licensing is required for this solution.

## Epicor® Payment Exchange™

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

Other processors may:

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

We understand the strain of running your business and dealing with cash flow, employees, scheduling, selling, and marketing. At Epicor, we want to make payment processing seamless so you can focus on caring for your customers and growing your business. But most importantly, we want to save you money.

## Epicor Tax Connect Global

Empower your business to confidently tackle global taxes. Traditional methods simply cannot keep pace—manually calculating value added tax (VAT) and sales tax is too difficult, risky, and error-prone in today's ever-changing compliance environment. Global Tax calculations are enabled as part of Epicor Tax Connect, which allows customers to calculate taxes for countries beyond the United States and Canada. Epicor Tax Connect Global is a seamless extension of tax calculations for customers in North America doing business with—and within—the European Union (EU) and selected countries worldwide.

Note: This is purely a tax calculation function for commercial invoices and is not a replacement for Country-Specific Functionality (CSF) packs sold separately. The solution supports rates in all countries with a VAT/GST system currently recognized by the United Nations, but not complex VAT or country-specific VAT scenarios.

## External Payroll Integration

The External Payroll Integration module enables you to configure external payroll setup in order to create files to export to an external payroll provider. Previously this functionality was available via a Professional Services extension. This capability is now an embedded functionality within Epicor ERP. Users with the Epicor-provided extension will have the option to migrate to this new embedded capability as part of the upgrade.

With the External Payroll Integration license, there is an Export File Layout Configuration program in the module that will allow you to create the export file exactly as requested by your external Payroll Provider.

A separate license called “ADP Payroll Integration” is available for customers who will be (or are) using ADP’s WorkForce Now application. This license can be purchased at an additional cost, and it includes a pre-configured file layout that can be used with ADP’s WorkForce Now.

## HCM Pay Hours and State in Time Entry

Epicor Human Capital Management (HCM) is an industry-leading solution for managing your employees. Epicor delivers on improved integration with Epicor HCM by integrating pay hours directly from time entry.

## Asset Revaluations

Use Asset Revaluation when the asset carrying value changes to record correct values in asset reports, trackers, and financial statements. This program allows you to create new revaluations, edit them, and post them to the journal tracker. Note that after the revaluation is posted you cannot edit it.

When you dispose of a revalued asset, the balance of the revaluation surplus account associated with the asset is transferred from the revaluation surplus account to a Disposal Revaluation Surplus context account. If the asset being revalued holds Grant Amount, then a grant depreciation amount is applied to the asset cost and the remaining part of the grant is written off to an unrecognized grant (liability account). If the revaluation is not posted in beginning of the year, the depreciation calculation for the following periods should treat revaluation in the same way as any other activity that changes the asset cost.

## Asset Depreciation Updates

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

Below are the new formulas used to calculate depreciation:

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

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

## Global chart of accounts

The global chart of accounts (COA) functionality enables you to define a COA once in a parent company, then distribute it automatically to subsidiary companies via the multi-company process. As well as initial distribution of a new COA, subsequent updates to the COA in the parent company can also update the COA in subsidiary companies. In addition, you can select which segments to distribute across companies.

## Customers and Suppliers in GL Journals

Often, manual journal entries need to be linked to a specific entity within the system for reporting and tracking purposes. Now, users will have the ability to link these entries to customers, suppliers, bank accounts, and individual invoices. Once linked, these entries will be available in the corresponding trackers for the individual documents as well as any ad-hoc reporting.

## Multi-Company GL Allocations

New functionality added for Advanced Allocations to allow users to target their GL allocations to external companies and accounts.

## 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.

## Global and regional support

Epicor ERP offers country-specific functionality for 32 countries and is available 30 languages.

Improvements in meeting requirements to do business regionally and internationally are prevalent within each release. See the feature summary for a complete list of features added to support these countries.

AMERICAS	EUROPE MIDDLE EAST AFRICA & INDIA		ASIA
Argentina	Belgium	Norway	Australia
Chile (Partner)	Czech Republic	Poland	China
Colombia	Denmark	Romania	Japan
Mexico	Estonia	Sweden	Malaysia
Peru	Finland	Switzerland	New Zealand
USA	France	United Kingdom	Taiwan
	Germany	Netherlands (Partner)	Thailand
	India	EU – SEPA	Singapore
	Italy (Partner)		Vietnam

## U.S. 1099 support

The Internal Revenue Service (IRS) requires businesses to file a 1099-Misc form to report certain payments made to individuals and/or organizations. Whether a payment is reportable on Form 1099-Misc depends upon the payment amount, payment type, and the supplier's business entity type. In order to facilitate the tax reporting process and provide a way to fulfill IRS regulations, 1099 functionality is available in the Epicor ERP application with a United States CSF license. This functionality includes 1099-Misc form setup, processing, and reporting.

## Non-Recoverable Taxes

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

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

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

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

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

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

## Value-Added Tax (VAT) Reporting Date Selections

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

## Asset Annual Schedule Report Enhancements

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

## General Ledger—Easier Upgradability of Posting Rule Changes

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

## Company-Specific Time Zone Support

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

## 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.

## Electronic Compliance Engine

The Electronic Compliance Engine consists of new functionality designed to allow definition, generation and distribution of electronic documents in formats such as XML, JSON and CSV. In many countries there are specific reporting requirements (including electronic accounting, invoicing, and SAF-T reporting) mandated by government agencies that must be generated from the ERP system. Such regulatory requirements can change periodically and rapidly. The functionality is designed to allow definition and distribution of document formats outside of the normal software version release cadence. The functionality also has broad use for generation of document formats used for system integrations and other data reporting applications.

The functionality leverages the existing reporting framework by extending the report data definition (RDD) to allow multi-level BAQs and electronic interfaces to be defined as data sources to any report. A licensed electronic compliance UI component allows the user to define the reporting format required, or to generate the format from

an existing XML, JSON, or CSV template. Document generation can be assigned to a schedule for defined periodic initiation, or, to an Auto-Print workflow for generation based on data rules. The Solution Workbench is enhanced to allow delivery of the extended RDD structure across systems. The license for electronic compliance will be required by:

- ▶ Users who have country-specific functionality (CSF) that includes the need for compliance reporting.
- ▶ Users who have system integration requirements requiring outbound generation of electronic documents.
- ▶ Users who have other requirements to produce complex XML, JSON, or CSV formatted documents driven from the reporting framework.

For companies with country-specific functionality requiring Electronic Compliance, the license will be in addition to the price for the CSF (although it only needs to be purchased once for users that have multiple CSFs for different companies).

The license is not required to utilize the new BAQ and electronic interface elements as data sources to the RDD and to distribute these via the Solution Workbench.

## New Canadian Country-Specific Functionality (CSF)

To meet the complexity needed for Canadian businesses, Epicor has developed a new CSF that includes robust functionality needed for this country.

### CPA-005 Electronic Bank Transfer

We are introducing new EBT formats similar to ACH CPA-005 layout file that is designed and maintained by the Canadian Payments Association (CPA) that offers our Canadian customers the ability to initiate electronic funds transfers from their residents' bank accounts. Accurate cash flow forecasting, payments and improve control of overall cash flow and establishing set payment dates and time reduction, errors, and cost of handling incoming cheques, bank deposits and data entry into your accounts receivable system will be the value added of this functionality.



### Chart of Accounts Report Code

The Canada Revenue Agency (CRA) requires to Canada taxpayers to define their Accounts based on the GIFL codes Epicor provides to our Canadian Customers the way to report the GIFL codes as part of the GL segments and COA to be able to generate the Canada BS and P&L Statement Information formats T2SCH100\_ T2SCH125 by using Financial Report Designer directly from the software.

### Canadian invoicing format

When doing a Canadian invoice, how to invoice the customers who buy your products and services depends on your Canadian small business's tax situation.

Because of the different tax requirements of various provinces and the rules surrounding the Goods and Services Tax (GST) and Harmonized Sales Tax (HST), an invoice from a business that qualifies as a Small Supplier in Alberta has different requirements than an invoice from a business in Ontario that doesn't. Epicor will be providing the invoicing layouts required by the Canadian authorities for you to be able to use them as per your business requirements.

### Misc. payments to residents and non-residents.

Epicor is providing as part of Canada CSF, the formats T2SCH14 and T2SCH29 that must be completed by all corporations who made payments to residents of Canada for reportable management fees and technical assistance fees.

## Third-Party Applications and Integrations

As part of the 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 software implementation, the Epicor team will work with our customers to determine the most appropriate solutions for their business needs with respect to the third-party applications and integrations we offer.

Epicor 10.1 includes support for the following products at release:

- ▶ Epicor® AgileShip Manifest from Agile Network, LLC
- ▶ eVision® from TIE Kinetix
- ▶ Epicor® Precise Point of Sale from Precise Business Solutions
- ▶ Epicor® Advanced Requisition Management from Precise Business Solutions
- ▶ Cadink™ from QBuild Software Corporation
- ▶ Epicor® Product Lifecycle Management from PROCAD GmbH & Co. KG
- ▶ Epicor® Advanced Print Management (DocLink™ 3.1) from Altec, Inc.
- ▶ Epicor® XL Connect from Biznet Software Inc.
- ▶ Epicor® Cash Collect from e2b software
- ▶ Epicor® Financial Planner (EFP) from DSPanel
- ▶ Epicor® EPM Performance Canvas from DSPanel
- ▶ Epicor® Knowledge Mentor from SAP
- ▶ Microsoft® SSRS from Microsoft
- ▶ Epicor Field Service Automation from Hitachi Solutions
- ▶ Epicor® Advanced Quality Management from IQS, Inc.
- ▶ AutoVue® from Oracle
- ▶ BarTender® from Seagull Scientific, Inc.
- ▶ SAP® Crystal Reports® from SAP SE
- ▶ Epicor® Tax Connect (Global) from Avalara Inc.
- ▶ SmartForecasts® from Smart Software, Inc.
- ▶ ForecastPRO® for Epicor from Business Forecast Systems, Inc.

- ▶ XSOL InOrder from XSOL, Ltd.
- ▶ Workforce Now® from ADP, LLC

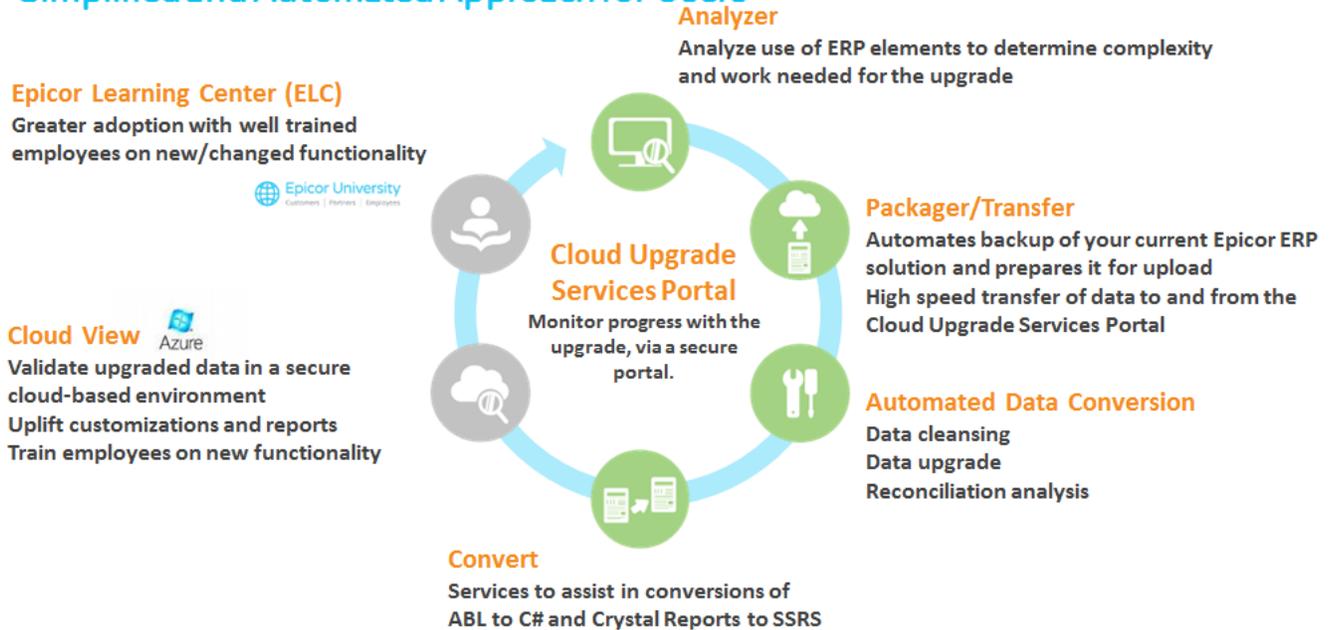
## Compatibility

The technical foundation of Epicor 10.1 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 Microsoft® Internet Explorer®, 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. In order to simplify the upgrade process from Vantage, Vista, and Epicor 9 to ERP 10.2, we have invested heavily in new tooling and services dedicated to the process of upgrading.

## Epicor Cloud Upgrade Services Simplified and Automated Approach for Users

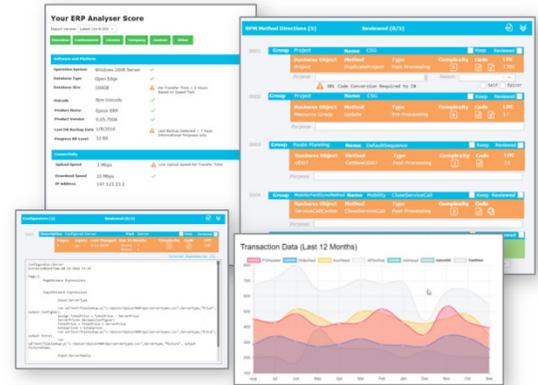


## Cloud Upgrade Services Available Vantage, Vista, and Epicor ERP 9 Users

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

## Analyzer

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



## Packager/Transfer

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

## Data Upgrade

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

## Reconciliation Reporting

After upgrading data, one of the challenges for businesses is to validate 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, even upgrade customizations and configurations. Epicor offers a tool in Epicor ERP called Solution Manager that enables users to save entire solutions at a time and export and import them between releases. This is very powerful during the upgrade.

### Epicor Learning Center (ELC) Upgrade Essentials Courses

Epicor University offers 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 you have purchased Embedded Education.

## Epicor Support

Epicor stands behind all of its products with an award-winning support organization capable of serving our global user base efficiently and effectively. With more than 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 (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):

Assist IT staff in resolving technical system issues

- ▶ 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 performance of their certified software and systems
- ▶ Assist with 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

### 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

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.

## Software Support Life Cycle

Epicor is committed to be 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.

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

Product Release	Release Date	Support Stage	End/Transition Date
Epicor ERP 10.2.400	May 16, 2019	Active	Move to Sustaining May 16, 2021
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	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

# Epicor University



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

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

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



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

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

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

## Instructor-Led Training

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

## Epicor Learning Center (ELC)

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

## On-Site Training

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

## Virtual Training

Virtual classes provide an online equivalent to our classroom courses and the same instructor-led experience at an attendee's desktop. Virtual classes provide a flexible and cost-saving alternative to the traditional classroom setting. Attendees simply require a phone and internet connection to participate in the real-time, hands-on interactive training.

## Self-Paced Education

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

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

# Learning Resources

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

- ▶ User Guides: Illustrated, detailed instructions that walk users through major application functions.
- ▶ Feature Summaries: Concise overviews of the new functionality within a new product release.
- ▶ Online Help/Field Help: Document application feature/functionality, field definitions, tips, and examples.
- ▶ Technical Reference Guides: In-depth information on the most complex functionality and business logic.
- ▶ Installation Guides: Comprehensive instructions on installing applications.

# Epicor Upgrade Services

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

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

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

## Upgrade Signature Methodology

The Epicor Signature Methodology is leveraged in every Epicor Professional Services engagement to implement and upgrade your ERP software. Decades of successful software implementations and upgrades have refined the program, resulting in minimized risk, cost, and business disruption. The process of upgrading has driven the need for a specific upgrade methodology to move your ERP to the latest Epicor ERP release. The upgrade program incorporates the elements needed from the Upgrade Signature Methodology with the additional assistance your business may need—including Technical Consulting, Customization Services, Reporting Services, Configurator Services, EDI Services, and Onsite Business Consulting. Visit the [Upgrade and Migration Center on EPICweb](#) for more information and resources.

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## About Encompass

Encompass Solutions is a business and software consulting firm that specializes in ERP systems, EDI, and Managed Services support for Manufacturers and Distributors. Serving small and medium-sized businesses since 2001, Encompass has helped modernize operations and automate processes for hundreds of customers across the globe. Whether undertaking full-scale implementation, integration, and renovation of existing systems, Encompass provides a specialized approach to every client's needs. By identifying customer requirements and addressing them with the right solutions, we ensure our clients are equipped to match the pace of Industry.

**en>compass**

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