

# Epicor ERP 10.2.200 Release Guide

User Briefing Paper

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# Table of Contents

|  |    |
|--|----|
| Introduction.....  | 1  |
| General .....  | 3  |
| Active Home Page Executive Template .....  | 3  |
| Active Home Page Improvements .....  | 3  |
| Exploration View Improvements in EDD .....   | 4  |
| New Visualization Options in EDD.....  | 4  |
| Epicor ERP Knowledge on Demand Video Library— <a href="http://erpvideo.epicor.com">erpvideo.epicor.com</a> ..... | 5  |
| Epicor Data Analytics Improvements .....   | 5  |
| Sales and Marketing Management.....  | 5  |
| Epicor Mobile CRM Available in New Markets .....   | 5  |
| Material Management.....   | 7  |
| Epicor Manifest 4.0.3.....   | 7  |
| Purchase Order Entry—Expanded to 9,999 Order Lines .....   | 7  |
| Manifest LTL and International Support Improvements .....  | 7  |
| Service Management.....  | 8  |
| Epicor Field Service Automation Available in New Markets.....  | 8  |
| Epicor Field Service Automation Integration Improvements .....   | 8  |
| Financial Management .....   | 9  |
| Epicor Advanced Financial Reporting Now Engineered for the Cloud .....   | 9  |
| Epicor Tax Connect Global.....   | 9  |
| AR Stronger Customer Credit Management.....  | 10 |
| AR Adjust Cash Receipt.....  | 11 |
| AR Print Date, Time, and Copy Number in AR Invoices and Credit Memos .....                                       | 11 |
| AR Invoice Search—Created By .....   | 12 |
| AR Tax Timing for Advanced Billing or Direct Deposits .....  | 12 |
| AR Controlled Credit Memo Entry Option.....  | 12 |
| AR Negative Amounts Options .....  | 12 |
| AP Non Recoverable Taxes—Logged Invoices .....   | 12 |
| AP Payment Withholding Taxes base on Invoice Tax Categories .....  | 13 |
| AP Inactive Supplier Invoice Controls.....   | 13 |
| Epicor Payment Gateway Token Migration and Void Authorization.....   | 13 |
| ICE Framework and Tools .....  | 13 |
| Delighting Our Customers Through Telemetry Analytics .....   | 13 |
| Single Sign-On for Epicor Cloud ERP—Support for Microsoft Azure AD Authentication .....                          | 14 |
| Support for Transparent Data Encryption (Supports GDPR) .....  | 14 |
| Security Code for System BAQs .....  | 15 |
| Electronic Compliance Engine—Report Submission Tracking .....  | 15 |

|  |    |
|--|----|
| Electronic Compliance Engine—Digital Certificate Store ..... | 15 |
| New Country-Specific Functionality for Portugal .....        | 15 |
| Improvements to Existing CSFs .....                          | 15 |
| Third-Party Applications and Integrations.....               | 16 |
| Compatibility—Support for Microsoft SQL Server® 2017.....    | 16 |
| Upgrading to 10.2 .....                                      | 17 |
| Epicor Support .....   | 20 |
| Software Support Lifecycle .....                             | 22 |
| User Groups .....  | 23 |
| Epicor University.....                                       | 23 |

# Introduction

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

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

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



Epicor ERP 10.2.200 continues on the themes from 10.2.100 to offer even more advantages to users to meet these challenges with ease. It is based on five key themes:

1. **Cloud-first strategy**—Extending our use of cloud-based applications for both cloud and on-premises users continues with 10.2.200. In particular, Epicor Cloud ERP solutions are able to use Microsoft® Azure® Active Directory Authentication for secure single sign-on and Epicor Advanced Financial Reporting (AFR) is now available with Epicor Cloud ERP

2. **Globalization and localization**—Epicor continues to focus on the changing global landscape and is ready to support global opportunities for your business. Compliance with new regulatory requirements and enhanced features focus on maintaining our geographic footprint in China, Colombia, Mexico, Peru, Poland and the UK. Also, we introduced new country-specific functionality (CSF) to support Portugal, which adds a new country to our portfolio. The Compliance Engine offers report Submission tracking, along with a new Digital Certificate Store to manage certificates—including those from governmental entities. The General Data Protection Regulations (GDPR) requirements will benefit from support of Microsoft SQL Server® SQL Transparent Data Encryption (TDE), as it offers encryption of your entire data at rest. GDPR is a new European Union (EU) regulation that is scheduled to take effect on May 25, 2018.
3. **Experiences**—Epicor Active Home Page continues to evolve to better serve users. With the addition of the Knowledge on Demand (KoD) video library available at [erpvideo.epicor.com](http://erpvideo.epicor.com)—with over 100 videos across the application—users can experience Epicor ERP with newfound knowledge of its use. In Finance, users can manage cash transactions easier with new adjust cash receipt functionality and cash receipt writeoff functionality at the time of receipt.
4. **Analytics**—The Active Home Page offers a new Epicor Data Discovery (EDD) template for executives that offers six new metrics designed to provide new levels of business visibility. EDD also received new visualizations and exploration view improvements. Enhancements in security for BAQs means EDD views are more secure than ever before. Also on the analytics front, we've improved the user-defined fields and multicurrency alignment in Epicor Data Analytics (EDA), which is an optional add-on to your ERP system.
5. **Deep industry focus**—New and enhanced capabilities will be introduced—including Manifest 4.0.3 with more shipment options—and Epicor Field Service Automation (FSA) is now available in new regions. Finance now offers stronger controls for credit management.



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

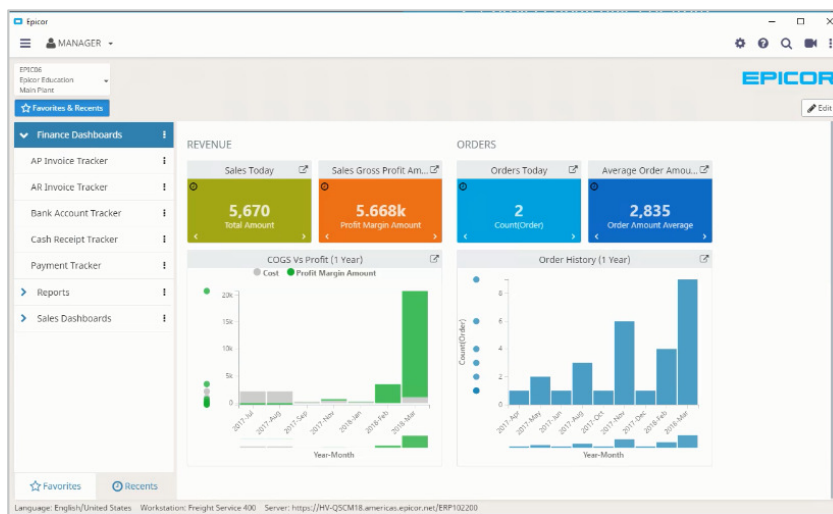
# General

## Active Home Page Executive Template

EDD offers users an easy-to-use data exploration and data visualization experience. With the release of 10.2.200, a new EDD template for executives is available that offers six new metrics designed to provide new levels of business visibility. This template is in addition to the existing templates already available—including finance, supply chain, and production. The list of key performance indicators (KPIs) found in the new executive template include:

- ▶ Average Order Total Today
- ▶ Gross Profit Today
- ▶ Sales Today
- ▶ COGS vs. Profit
- ▶ Orders Today
- ▶ Order History

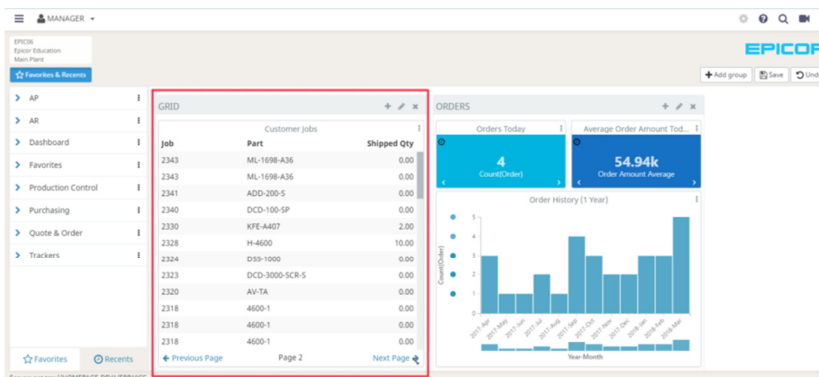
In addition to the standard views provided with the application, you can also create custom EDD views from system Business Activity Queries (BAQs) or your own library of BAQs that display specific data you need and add them to your Active Home Page—which is pictured to the right.




## Active Home Page Improvements

Epicor ERP 10.2 offers a new visual experience for users with the option to opt-in to a new Active Home Page at login. The home page—shown in the section above—is enhanced in 10.2.200 with the following new features:

- ▶ The new grid style tile type for BAQs displays BAQ results in a grid within the Active Home Page
- ▶ To avoid confusion with the use of Epicor Data Discovery tiles in the Active Home Page, the Discovery View tile has been renamed to Discovery Chart View (the larger tiles), and the Discovery View 1x1 tile has been renamed to Discovery KPI View (the smaller tiles)



- ▶ Usability features have been added, including an indicator for the last time the tile was refreshed, easy drop down menu for moving a tile to another tile group, access to the Epicor ERP Knowledge on Demand video library with the  icon, and a cleaner web view without links that don't work in web view
- ▶ Another usability feature allows you to have two choices to view tile animations—either automatically or manually—by clicking the little arrows in the bottom corners of the tile to flip from view to view

## Exploration View Improvements in EDD

Epicor continues to invest in the robust architecture of Epicor Data Discovery to enable users greater, easier access to visual information. Some of the new capabilities include:

- ▶ The view title is added directly above the visualization
- ▶ You can edit the view title by clicking it
- ▶ The Brush/Reset button and Transaction Grid toggle (show/hide) are moved to a toolbar below columns at the top right
- ▶ The animation playback controls are moved to the bottom of the view below the chart
- ▶ The animation Play/Pause button is styled like a toggle button and aligned with the slider
- ▶ The current animation point details are overlaid at the top-right corner of the chart in a large, semitransparent font
- ▶ The Toggle Labels option for pie charts is moved to the Options panel
- ▶ The Time Series filters are added to the BAQ data source measures

## New Visualization Options in EDD

Greater visualization is now available with the below optional chart types:

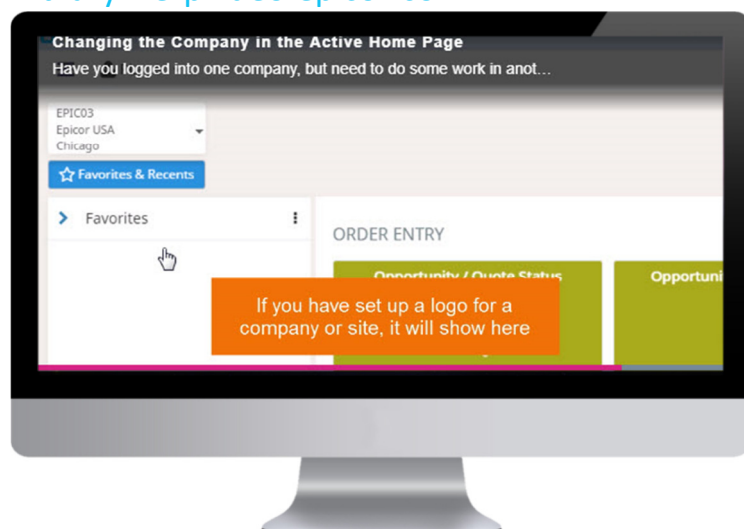
- ▶ Pareto Chart—a dual axis chart that contains both bars and a line graph—where a bar shows values sorted from largest to smallest, and a line shows the cumulative total percentage of all the bars up until that point. Use the Pareto chart to perform part-to-whole comparisons for large sets of data.
- ▶ Trendlines—a Trendline added to a chart reveals the overall direction of the data. EDD supports five types of trendlines:
  - Cumulative %—shows the cumulative percent of total from left to right on the visualization
  - Average—a simple, flat line showing the average of the set
  - Moving average—user specifies range
  - Linear—a straight line that most closely approximates the data in the chart
  - Polynomial—user specifies order



## 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 10.2.200 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 to 10.2.200 but would still like access to KOD videos, go to [erpvideo.epicor.com](http://erpvideo.epicor.com).



## Epicor Data Analytics Improvements

Epicor Data Analytics (EDA) is an easy-to-use solution that takes a unique, intuitive approach to lead you on a journey of discovery through large data sets contained in your data warehouse.

- ▶ You can now use Base Currency Measures to view EDA content in the currency through which each company in your database does business.
- ▶ The EDA application now incorporates the functionality of adding automatically joinable user-defined fields to the base EDA content. You no longer need to edit SQL scripts to add unique data to the EDA database. Simply drag and drop user-defined measures and dimensions to create a custom database.
- ▶ Changes to the Sales Management content pack were implemented to improve greater analysis around sales and salesperson performance, including:
  - Sales Database—updated to provide a more detailed analysis of sales—including Invoices, Orders, and Quotes
  - Salesperson Performance Database—added to track salesperson performance

## Sales and Marketing Management

### Epicor Mobile CRM Available in New Markets

You need to be able to respond to customer requests in a fast and efficient way. It is crucial to take advantage of the latest technologies by providing your sales force with easy-to-use tools that increase productivity and employee engagement.

Epicor Mobile CRM empowers your sales team by providing mobile access to the entire CRM suite of capabilities on any



iOS™ or Android™ device. You can manage the sales cycle from lead to quote—anytime, anywhere.

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

Epicor Mobile CRM is an integral part of your Epicor ERP solution and can be utilized at no additional cost beyond your back-office user license or CRM user license.

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

# Material Management

## Epicor Manifest 4.0.3

Epicor ERP 10.2.200 introduces support for a new release of Epicor Manifest designed to help companies offer their customers even more shipment options to personalize the customer experience, drive out costs, and speed time-to-delivery. Improvements in Manifest include:

- ▶ Rate Shopping enhancements, including:
  - Integration with Customer Shipment Entry in Epicor ERP 10
  - ERP shipment date is used or defaults to today's date
  - Shipments created by order release ship to destination are from Epicor ERP 10
  - Shipments created by order release ship by date are from Epicor ERP 10
  - Option to push back freight charges to Epicor ERP 10
  - ERP Data Find is auto triggered
  - UPS SurePost Services are included
- ▶ FedEx Certification for the EMEA region (Europe, Middle East, and Africa)—including services originating from and within the region
- ▶ Shipping Charge Scheme or carrier rate adjustments may be a flat rate or percentage
- ▶ Error message displays when the tariff code is missing on international shipments
- ▶ Bill of Lading (BOL) lines are refactored based on container type, container dimensions, and BOL Class
- ▶ Expanded container type to include number of pieces for the BOL
- ▶ Canadian-specific enhancements, including:
  - Integration with carrier—Purolator
  - Integration with carrier—Canpar
  - Canadian Export Declaration Form B13A is now generated from Manifest

## Purchase Order Entry—Expanded to 9,999 Order Lines

For large purchase orders with many line items, the number of lines available has been expanded to 9,999.

## Manifest LTL and International Support Improvements

When performing LTL and international part shipments, shipping managers can now use the new Fair Market Value and BOL Class fields in Part Maintenance to specify fair market values and BOL for the part in manifest. BOL Class is used when performing LTL shipments with non-density carriers. When shipped, this BOL Class will be used to rate the shipment and create the Bill of Lading with the freight class of the commodities being shipped. Also, the Fair Market Value field is used in export value calculations when no sale price is provided on the order and a product value is required.

# Service Management

## Epicor Field Service Automation Available in New Markets

Epicor Field Service Automation (FSA) is now available in the Americas, UK, and Australia.

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, lowers costs, improves first-time completion ratios, and increases customer satisfaction to build a competitive advantage.

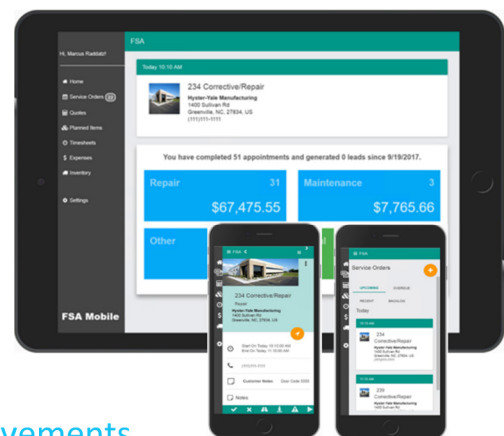
Built on modern and proven technologies, this solution is easy to use and compatible with your existing infrastructure. You can take advantage of existing IT investments, deploy with minimal training, offer your people familiar time-saving tools, and achieve a rapid return on investment (ROI) at a low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

Epicor FSA is now available in the UK, New Zealand, and Australia in addition to the Americas.

### Mobile experience

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

Epicor FSA requires a separate license.



## Epicor Field Service Automation Integration Improvements

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

Integration improvements include the following:

- ▶ **Installation Appointment and Installation Price**—In Epicor ERP, you can define whether or not the sold equipment requires an installation appointment so you can install the equipment in a service location. You can also define an installation price and charge a customer based on the defined price. You set the installation requirement at the Part Maintenance, Sales Order Entry, and Customer Shipment Entry levels. When you ship equipment that requires an installation, the equipment is considered as installed only when a service technician completes the installation order in Epicor FSA. Using the FSA Sync Workbench, you can set multiple parts—or equipment—to require installation and define installation costs and types.

The defined Installation Type is used as a template ID, so a specific service order template is used to create a service order in Epicor FSA.

- ▶ **Service Vehicle to Service Vehicle Inventory Transfer**—During an inventory transfer using Epicor FSA Mobile, when you transfer items from one vehicle (FROM Location) to another (TO Location), the change of quantity is reflected in Epicor FSA and Epicor ERP.
- ▶ **Material, Labor, and Invoice Transactions References**—In Epicor ERP, you can review the origin of the Epicor FSA references at multiple levels. The levels include AR Invoice Entry/Tracker, Time and Expense Entry/Tracker, and Part Transaction History Tracker. Review the transaction to determine the miscellaneous charges, taxes, labor hours, or usage of inventory incurred against a specific service order/contract in Epicor FSA. You can leverage the fields located in the programs to create BAQs. For example, you can determine how much time was spent on a certain service call or what is the cost incurred against a service call/material (equipment).
- ▶ **Credit Memo**—In Epicor FSA, you can enter a Credit Line on a new or existing service call. To reduce the accounts receivable portion for an invoiced customer, a credit memo is automatically generated—reducing the owed amount. The generated credit memo is unapplied. If you issue a Credit Memo for an existing service order and the service order is already invoiced, the created Credit Memo is applied to the previously issued invoice—if there is still a balance and the balance of the invoice is reduced. If the Credit Memo is for a brand new call, then the FSA Integration creates a brand new Credit Memo.
- ▶ **Legal Numbers**—In Company Configuration, you can define default legal numbers for Credit Memos and AR Invoices being imported from Epicor FSA.

## Financial Management

### Epicor Advanced Financial Reporting Now Engineered for the Cloud

Epicor Advanced Financial Reporting (AFR) allows the creation and distribution of professional financial reports to company stakeholders. It allows the management and viewing of financial data in a user friendly and easy-to-use environment. Financial reports are different from other reports because each line has to be defined in terms of account ranges or sets for which a certain total needs to be calculated—versus other types of reports, which do not require definitions of such complex groups. Epicor AFR simplifies report creation by exposing an intuitive interface which speaks to the user in familiar financial terms.

Epicor AFR has been reengineered for the cloud for greater access to financial reporting for Epicor ERP Cloud deployments.

### 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.

## 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 Writeoffs 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 writeoffs. This feature enables invoice to be increased through a negative writeoff.

Comments to identify the reason for the writeoff 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.

## AP Non Recoverable Taxes—Logged Invoices

With regards to logged invoices, two new features are offered in managing non-recoverable taxes to improve the workflow of these events.

- ▶ Account for Taxes Option—Epicor ERP books the non-deductible portion(s) of the applicable taxes to the Non-Deductible Tax account from the tax code's Tax Rate GL Control at the time of invoice posting in Logged Invoice Entry—if you set one up. If you don't, the application sends the Logged Invoice to the Review Journal. Once the logged invoice is approved and matched to an AP Invoice in AP Invoice Entry, the application doesn't post anything related to the taxes already accounted for on the Logged Invoice.
- ▶ Book All to Suspense Accounts Option—Epicor ERP application books the entire portion of the applicable deductible taxes to the Tax Suspense account and Non-Deductible Tax to Expense Suspense at the time of invoice posting in Logged Invoice Entry. Once the logged invoice is approved and matched to an AP Invoice in AP Invoice Entry, the application moves the non-deductible portion of the applicable tax out of the Expense Suspense account and follow AP Invoice Non-Deductible Tax accounting rules.



## 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.

## Epicor Payment Gateway Token Migration and Void Authorization

Designed to reduce the effort needed to transition to the Epicor Payment Gateway tokenization service, the new Token Migration and Void Authorization program enables you to convert credit card tokens that were created in Secure Data Manager (SDM) to the Epicor Payment Gateway tokenization service. Therefore, you do not need to request customers' credit card information when you change your payment processor. You can then reauthorize the prior voided authorizations using CRE and the Epicor Payment Gateway.

# ICE Framework and Tools

## Delighting Our Customers Through Telemetry Analytics

With the launch of Epicor ERP 10.2, Epicor introduced Telemetry to capture information on use of Epicor ERP to deliver a better ERP experience for users. When installing Epicor ERP, it automatically activates the Telemetry and License Data gathering service.

This key international service helps Epicor troubleshoot issues, analyze trends, and improve both products and services. The Telemetry and License Data service does this by collecting license information, product usage, and other non-personal telemetric data. This data primarily consists of access dates and times, IP addresses, computer types, browser types, active ERP features, and performance metrics. This data does not identify the organizations or individuals who entered this information.

Specifically, Epicor ERP 10.2.200 expands the telemetry footprint for the Active Home Page and Epicor Data Discovery to gather information on use such as active users, active sites, tile type usage, open EDD views, and time spent on EDD views.

As users generate activity in ERP, the service gathers this usage data and sends it to Epicor. This data then aggregates the telemetric information it receives worldwide from other Epicor customers. Epicor can then determine if a version has any application or performance related issues to resolve in an upcoming release.

This service activates when you install Epicor ERP. As you deploy an application server in the Epicor Administration Console, the Telemetry and License Data message appears. A message lets you know that telemetry tracking is now active.

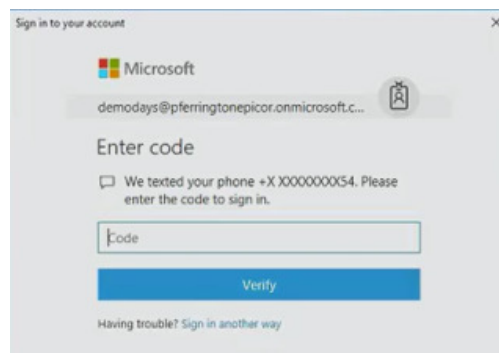
Note that because of regulatory requirements, companies in Russia and China cannot participate in the telemetric collection process. If your company resides in either country, be sure the country code is set correctly. If it is not, the company will cause a regulatory violation.

Epicor encourages customers to participate in this data gathering service, but it is not mandatory. You can also target this service so it only collects data from specific companies. You can turn off this data collection service at any time for a specific company within the Epicor Administration Console.

## Single Sign-On for Epicor Cloud ERP—Support for Microsoft Azure AD Authentication

Epicor ERP now offers three ways to authenticate or validate who you are for access to Epicor ERP. In addition to authentication through a standard user ID/password and Windows Identity authentication, you can now authenticate through Microsoft Azure AD Authentication.

By offering this method, businesses can perform single sign on while strengthening their security procedures through AD Authentication—Multi-Factor Authentication. Multi-Factor Authentication is needed by cloud deployments, as it requires more than just a password to authenticate. For example, many systems require you to send a text to your cell phone that is entered online before allowing access.



In release 10.2.200, Microsoft Azure AD Authentication is available with the Epicor ERP Windows Client, Epicor Web Access, Epicor RESTful Services, Manufacturing Execution System (MES), Handheld, Epicor Data Discovery, and Active Home Page. Service Connect and Social Enterprise do not support ADD at this time, and standard authentication will need to be used for these products.

## Support for Transparent Data Encryption (Supports GDPR)

Microsoft SQL Server SQL Transparent Data Encryption (TDE) offers encryption of your entire data at rest. The data is encrypted between the SQL Server application server and the data server. It is automatically decrypted by the application server. This provides stronger security for your data by preventing access in a backup scenario. For example, they would not be able to read it without the SQL Server application server. Also, there are keys and certificates that prevent it from being restored to another database.

Businesses looking to comply with new General Data Protection Regulation (GDPR) can benefit from using TDE to secure access to your data.

Note: This capability is available with Enterprise versions of Microsoft SQL Server 2016 or newer and offers minimal impact to your production environment.

## Security Code for System BAQs

In 10.2.100, a new feature was developed to be able to apply security to a custom BAQ. This has been expanded to enable security on system BAQs. In particular—for use with Epicor Data Discovery where system BAQs are used with EDD content delivered for users or user groups—the ability to control access to system BAQs closes access to users without needing to build out security restrictions at the table level.

## Electronic Compliance Engine—Report Submission Tracking

Closely managing report submissions to ensure compliance with requirements becomes easier with new capabilities in Epicor ERP designed to identify each submission event through a submission ID. The Submission ID allows retrieval and review of the last set of report parameters used. After a Submission ID is assigned and the report is generated and reviewed, the user can flag it as submitted.

## Electronic Compliance Engine—Digital Certificate Store

Governments around the world are requiring interaction through digital data. As a result, Epicor developed the Electronic Compliance Engine to manage the templates needed by region. To better manage the exchange of data, digital certificates are used to authenticate transactions coming from your business.

The Digital Certificate Store program is used to load and maintain digital certificates holding public or private keys. Bringing this functionality into the ICE Framework allows for more general use of the feature. The program enables users to load and store digital certificates—including those issued by governments—for later use. Additionally, as more and more businesses transact digital data, the ability to authenticate the origin of the data will be important for security purposes.

The Digital Certificate Store also supports company visibility—you can make your certificates available across all companies. System certificates protected from editing may be shipped by Epicor as part of application seed data. A Load Certificate Wizard provides a step-by-step guidance to loading digital certificates with a public or private key.

Epicor ERP Country-Specific Functionality (CSF) will leverage this store to maintain digital certificates.

## New Country-Specific Functionality for Portugal

For businesses in or looking to expand to Portugal, Epicor ERP now offers a CSF for Portugal.

## Improvements to Existing CSFs

Improvements have been made to the below CSFs in 10.2.200. See the feature summary for a complete list of features added to support these countries:

- ▶ China
- ▶ Colombia
- ▶ Mexico
- ▶ Peru
- ▶ Poland
- ▶ UK

## Third-Party Applications and Integrations

As part of the Epicor ERP 10.2.20000 release, we continue to support a range of related applications for the manufacturing, distribution, and services sectors. While a number of these third-party applications do support global enterprises, some do not at this time. As part of the implementation of the software, the Epicor team will work with our customers to determine the most appropriate solutions for your business needs with respect to the third-party applications and integrations we offer.

Epicor 10.2.200 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® XL Connect from Biznet Software Inc.
- ▶ Epicor® Cash Collect from e2b Technologies, Inc.
- ▶ Epicor® Financial Planner (EFP) from DSPanel AB
- ▶ Epicor® EPM Performance Canvas from DSPanel AB
- ▶ Epicor® Knowledge Mentor from SAP SE
- ▶ Epicor® Data Analytics from Phocus Ltd
- ▶ Microsoft® SSRS from Microsoft Corporation
- ▶ Epicor® Advanced Quality Management from IQS, Inc.
- ▶ AutoVue® from Oracle Corporation
- ▶ BarTender® from Seagull Scientific, Inc.
- ▶ SAP® Crystal Reports® from SAP SE
- ▶ Epicor® Tax Connect from Avalara Inc.
- ▶ SmartForecasts® from Smart Software, Inc.
- ▶ ForecastPRO® for Epicor from Business Forecast Systems, Inc.
- ▶ XSOL InOrder from XSOL, Ltd.
- ▶ Workforce Now® from ADP, LLC

## Compatibility—Support for Microsoft SQL Server® 2017

The technical foundation of Epicor 10.2 has been tested on the latest releases from Microsoft—including Windows 10, Microsoft Internet Explorer 11, and Microsoft SQL Server® 2017. It also supports several browsers, including Mozilla Firefox®, Apple Safari®, and Google Chrome®. For more information about compatibility, see the [Epicor ERP Hardware Sizing Guide](#) on EpicWeb.

## Upgrading to 10.2

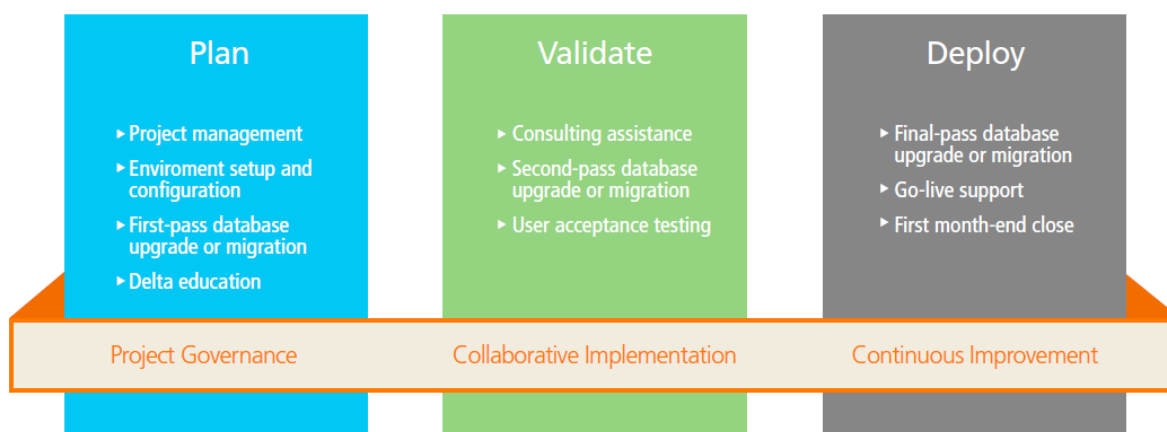
At Epicor, we firmly believe that all of our users will gain significant benefit from staying current on new versions of the Epicor ERP software. For users on the Epicor ERP 10 platform, the upgrade process is greatly simplified and allows for movement between releases without stepping through each release.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

In order to simplify the upgrade process from Epicor® Vantage®, Epicor® Vista®, and Epicor® ERP 9 to Epicor® ERP 10.2, we have invested heavily in new tooling and services dedicated to the process of upgrading. The upgrade has been reimagined with automation and guidance tools for the entire process.

### Upgrade program

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

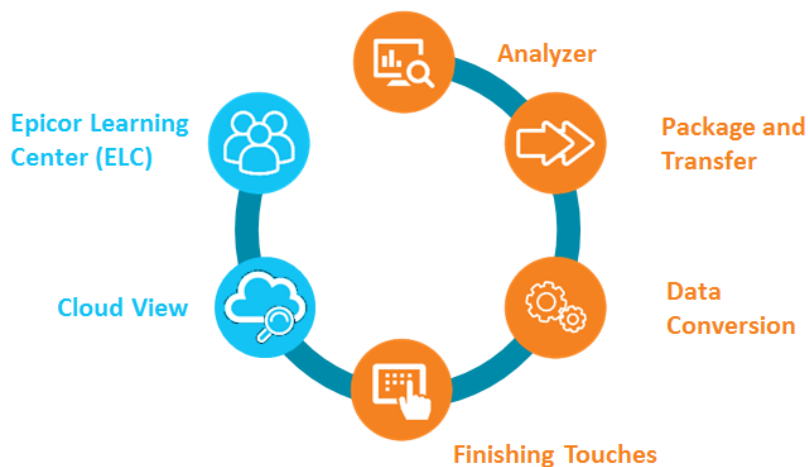
## Upgrade Signature Methodology



The process of upgrading has driven the need for a specific upgrade methodology to move to the latest Epicor ERP release. The upgrade program incorporates the elements needed from the upgrade Signature Methodology with the additional assistance your business may need—including technical consulting, modification services, reporting services, configurator services, EDI Services, Epicor University, and onsite business consulting.

### Cloud upgrade tooling and services

To encourage our Vantage, Vista, and Epicor ERP 9 users to upgrade to our current version, we have invested in cloud tooling and services dedicated to ease the process of upgrading. Taking advantage of cloud resources has helped our teams reach new levels of efficiency and collaboration in the upgrade process. Below is a matrix of availability of services as of the release of 10.2.200.

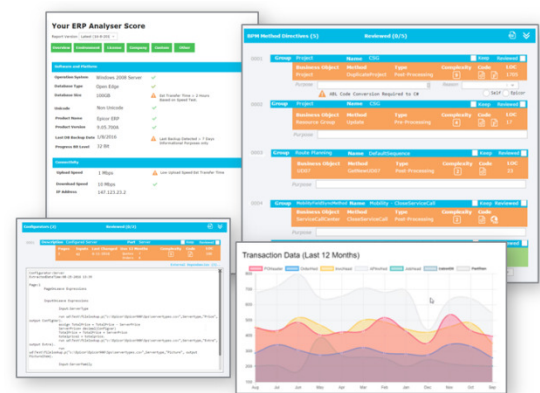


"It's super simple and you can watch it while it converts. You can see what step it is on and any errors."

Tim Ward, CIO  
Martin Automatic, Inc.

## Analyzer

The first step in the upgrade process is to assess the volume of customizations, configurations, and data for your business. To simplify this step 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 users, the upgrade works for any database at version 8.03.305 and above. Earlier versions can upgrade to 8.03.305 regionally or with assistance, then leverage the tooling for the rest of the upgrade. As Epicor is able to leverage cloud resources, the process is fast. A portal offers visualization of the converting data with status at each step of the process. The standard conversion package offers three passes of the conversion for optimal use.

## Reconciliation Reporting

After upgrading data, one of the challenges for businesses is to validate the data. In the past, users would run 13 reports before updating their data, 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

## Cloud View

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

## Epicor Learning Center Upgrade Essentials Courses

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

## Cloud Upgrade Tooling and Services Availability

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

\*Customer Account Manager (CAM)

## Epicor Support

Epicor stands behind all of its products with an award-winning support organization capable of serving our global user base efficiently and effectively. With more than 45 years of experience supporting users, Epicor Support has a proven history in user satisfaction and increasing the value that they derive from our software.

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

### Application Support Can:

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



### Technical Support Can:

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

### Extended Support Hours and Coverage

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

### Proactive Services

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

### Advanced Support Tools

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

### Online Support Center

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

### Product Updates

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

## Software Support Lifecycle

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

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

| Product Release  | Release Date      | Support Stage       | End/Transition Date                                    | Notes   |
|--|-------------------|---------------------|--|---|
| Epicor ERP 10.2.200                                      | April 19, 2018    | Active              | Move to Sustaining April 19, 2020                      |   |
| Epicor ERP 10.2.100                                      | December 6, 2017  | Active              | Move to Sustaining December 6, 2019                    |   |
| Epicor ERP 10.1.600                                      | May 15, 2017      | Active              | Move to Sustaining May 15, 2019                        |   |
| Epicor ERP 10.1.500                                      | November 8, 2016  | Active              | Active Support extended through December 31, 2018      |   |
| Epicor ERP 10.1.400                                      | December 17, 2015 | Enhanced Sustaining | Limited development support* through December 31, 2018 | Telephone support transition December 31, 2018<br>Additional module sales end December 31, 2018 |
| Epicor ERP 10.0.700 (earlier releases are in Sustaining) | August 4, 2014    | Enhanced Sustaining | Limited development support* through June 30, 2018     | Telephone support transition June 30, 2018<br>Additional module sales end June 30, 2018         |
| Epicor 9.05.702 (and earlier)                            | June 12, 2013     | Sustaining          | Currently in Sustaining                                | Telephone support transition June 30, 2018  |
| Vantage/Vista 8.03.400 (and earlier)                     | July 9, 2012      | Sustaining          | Currently in Sustaining                                | Telephone support transition June 30, 2018  |

\*Epicor is providing an “Enhanced” Sustaining support experience for some of our older releases to allow our customers additional time to plan and complete their move to the latest Epicor ERP release. Additionally, we will not transition to online support only for Sustaining Releases until June 2018. Customization and Implementation Services end when additional module sales end.

# User Groups

Epicor has formal user groups with industry-focused regional and international subgroups who meet regularly. These groups provide an opportunity to network with peers and benefit from their knowledge and experiences with Epicor software. User groups also provide a critical link between Epicor and our user community, providing a format for users to engage with Epicor in an open, collaborative environment as we work with them when planning future product releases.

# Epicor University



Epicor University provides learning tools, content, and training opportunities that enable you to achieve your business goals. The suite of tools available offer comprehensive training options that align to the different learning styles and needs of your employees. The below graphic represents content that is new for our 10.2.200 release across our learning resources:

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

Note: With 10.2.200, we are introducing Knowledge on Demand:

Knowledge on Demand (KOD) is a new video based quick answer system available directly from the Epicor ERP 10.2.200 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 to 10.2.200 but would still like access to KOD videos, go to [erpvideo.epicor.com](http://erpvideo.epicor.com).



## Introducing Knowledge on Demand

For quick answers to your in-app questions, check out our new Knowledge on Demand (KoD) service—built directly into your Epicor ERP 10.2.200 solution. These short videos are usually one or two minutes long to help you solve problems quickly. Search the video library or browse by category to get the answer you need and get back to more important tasks. If you have not yet upgraded to 10.2.200 you may access the site directly via this the [KOD Portal](#).



## Supply Chain and Manufacturing

### What's New Overviews

- ▶ 10.2.200 Delta Education •

### Field Service Automation

- ▶ Field Service Automation Technical Reference Guide •
- ▶ Field Service Automation Implementation Guide •

### Material Management

- ▶ Understanding the Inactive Setting for Suppliers •



## Finance

### What's New Overviews

- ▶ 10.2.200 Enhancements to Finance •
- ▶ 10.2.200 Delta Education •

### Accounts Receivable

- ▶ Accounts Receivable (update) •
- ▶ Defining Aging Codes and Assigning Them to Customers •
- ▶ AR Write-Offs via Cash Receipt Entry •
- ▶ Adjusting a Cash Receipt Applied to the Wrong Customer •
- ▶ Adjusting a Cash Receipt Applied to Incorrect Invoices •
- ▶ Using Credit and Aging Checking With Unposted AR Miscellaneous Invoices •
- ▶ Specific Tax Timing for AR Advanced Billing/Deposit Invoices •

### Tax Processing

- ▶ Setup for the Avalara Global Tax Solution •

### Credit Card Processing

- ▶ Credit Card Processing •



## Tools

### What's New Overviews

- ▶ 10.2.200 Enhancements to Tools •
- ▶ 10.2.200 Delta Education •

- ▶ Exploring Runtime Activity Through Epicor Data Discovery •
- ▶ Creating Runtime Views Using Epicor Data Discovery •
- ▶ Refine Runtime Activity Views Through Epicor Data Discovery •
- ▶ Electronic Compliance Phase 3 •
- ▶ Extensibility Phase 2 •

### SSRS

- ▶ Customizing Standard SSRS Reports •

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

| Learning asset         | Getting there   |
|------------------------|---|
| Training on Demand     | <a href="#">EpicWeb &gt; Education &gt; Epicor Learning Center</a>    |
| Embedded Education     | In Epicor ERP (license available from your customer account manager)  |
| Documentation          | <a href="#">EpicWeb &gt; Documentation</a>                            |
| Instructor-Led Classes | Email— <a href="mailto:education@epicor.com">education@epicor.com</a> |

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## About Epicor

Epicor Software Corporation drives business growth. We provide flexible, industry-specific software that is designed around the needs of our manufacturing, distribution, retail, and service industry customers. More than 45 years of experience with our customers' unique business processes and operational requirements is built into every solution—in the cloud or on premises. With a deep understanding of your industry, Epicor solutions spur growth while managing complexity. The result is powerful solutions that free your resources so you can grow your business. For more information, [connect with Epicor](#) or visit [www.epicor.com](http://www.epicor.com).

