

Epicor ERP
10.2.400
Release Guide
User Briefing Paper

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Executive Overview

At Epicor, our mission is to be the cloud vendor of choice in the markets that we serve. With this latest release of Epicor® ERP, 10.2.400, we continue to deliver on that statement. We announced our strategic partnership with Microsoft® Azure® in May 2018, and that relationship has deepened and evolved as our cloud business grows globally. The momentum is undeniable—as of April 2019, there are over 500 companies leveraging Epicor ERP in the cloud, a jump of nearly 20% since the last release.

Epicor continues to make investments in our industry capabilities, with functionality that can leverage the Internet of Things (IoT) in order to connect machines and gather data across factory floors. We are also still “customer-obsessed,” and have worked on modernizing and enhancing user interactions and experience throughout the entire customer journey.

Experiences

We have heard from our customers that one of the top areas they would like Epicor to invest in is usability. Epicor ERP 10.2.300 was our first step in a modern user experience (UX), featuring our Kinetic Design System that was introduced at Insights 2018. Kinetic is a leading UX design framework that delivers a modern look and feel while improving system usability and performance. With this latest release, we are introducing new best-in-class mobile time and expense applications built on the Kinetic Design System, to capture time and expense entry and approvals. We have also enhanced the usability of our Gantt-based resource scheduling board for a modern customer experience.

Epicor will introduce Epicor Virtual Agent, a digital agent embedded in our core product that enables users to get information in a quick and easy way. Finally, utilizing DocStar® software, we will offer Automated Order Entry in Epicor ERP, which will reduce customer time and touchpoints, and accelerate their sales and fulfillment velocity.

Analytics

Analytics continues to be a major area of investment with Epicor ERP. With Epicor Data Analytics (EDA). New content packs are released for both Project Management and Epicor ERP MES; users will gain greater insights into the status of their projects and ERP MES.

Industry

Epicor continues to invest in industry capabilities. Following the Dealer Network Portal introduced in the last release, we next introduce Supplier Portal in 10.2.400, which enables manufacturing customers to manage their supplier relationships, enter purchase transactions, and process RFQs in our best-in-class Epicor Commerce Connect eCommerce solution.

We refreshed and modernized frequently-used ERP MES screens using our Kinetic Design System. Advanced MES customers will also have a common shop floor interface via the Human Machine Interface (HMI).

Perhaps the most exciting solution in Epicor ERP 10.2.400 is Epicor IoT, a module that integrates with the Microsoft® Azure IoT Hub. This application monitors and visualizes data from sensors and other Epicor products. Epicor IoT leverages the power of Microsoft® Azure IoT Hub with the Epicor ERP context and production data to achieve new levels of operational efficiency. Through more intelligent insights into the production and day-to-day

activities of your enterprise, Epicor users can fully drive and control Internet of Things data with Epicor's industry-leading ERP solution.

Users can track and visualize dynamic inventory to help locate process bottlenecks, monitor downtime, and efficiency to improve asset utilization, and leverage predictive maintenance to boost quality and efficient manufacturing.

General

Epicor Virtual Agent (EVA)

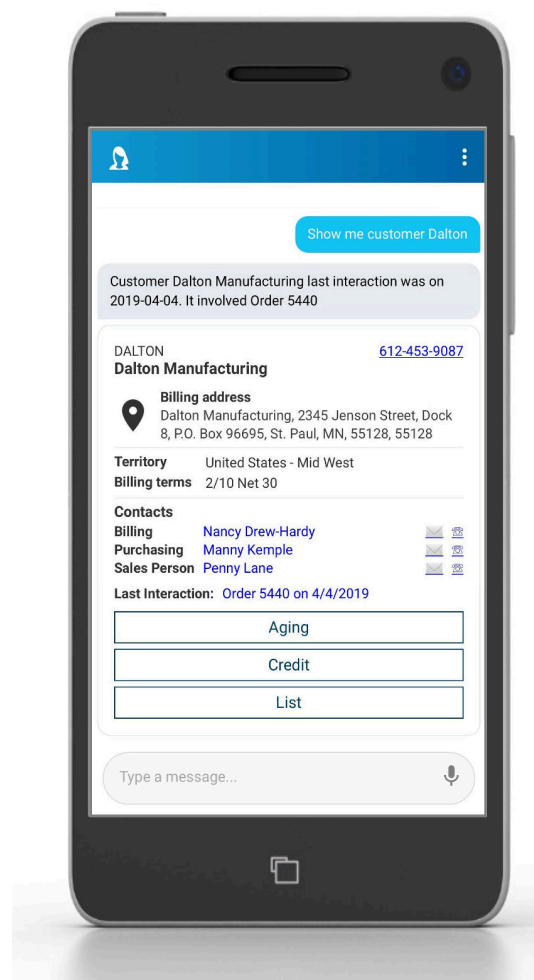
Epicor Virtual Agent, or EVA, is intelligence personified for your Epicor system. Users across the enterprise will be empowered by the context-aware natural language processing (NLP) of EVA, with whom they can converse through text or speech on their Android and iOS mobile devices.

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

EVA benefits:

- ▶ Most users already know how to use a conversational UI works on their devices, ensuring high acceptance for the EVA technology
- ▶ EVA is context-aware so your commands can be brief; EVA will understand what you mean based on what you said before
- ▶ Modern technology will help you attract and retain new talent in your workforce.
- ▶ Users can execute ERP actions anytime, anywhere with text or speech on their mobile devices; you can send your reps into the field with just their phones
- ▶ New employees are quickly onboarded with little training in ERP
- ▶ EVA places richly formatted information at users' fingertips using the Kinetic Framework System Adaptive Cards; button choices send quick responses

EVA skills



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

To start using EVA—just launch the EVA app on your device and start texting or talking. You can access parts, pricing, and other information for a customer. EVA initiates actions for you based on this information, such as creating a simple quote or converting a quote to an order. When you finish your inquiries and are ready to act, either press a button or say “create a quote for 40 of them” (for example). Since EVA is aware of the conversation’s context, the application knows which customer and item to quote.

The first release of EVA for Epicor ERP includes these skills, with more available via the adaptive card button choices:

- ▶ Identify a bin or warehouse location
- ▶ Get details of a bin’s contents
- ▶ Gather a part’s on-hand quantity in a warehouse
- ▶ Get a part’s available to promise information for a certain date
- ▶ Get details for a customer’s primary contact
- ▶ Adjust a part’s quantity in a location
- ▶ Sum approved purchases for a part for a certain date
- ▶ Get customer details that display in an adaptive card layout
- ▶ Get general part details that display in an adaptive card layout
- ▶ Convert an entire quote to an order
- ▶ Create a single-line quote
- ▶ Calculate the customer’s price for a part quantity

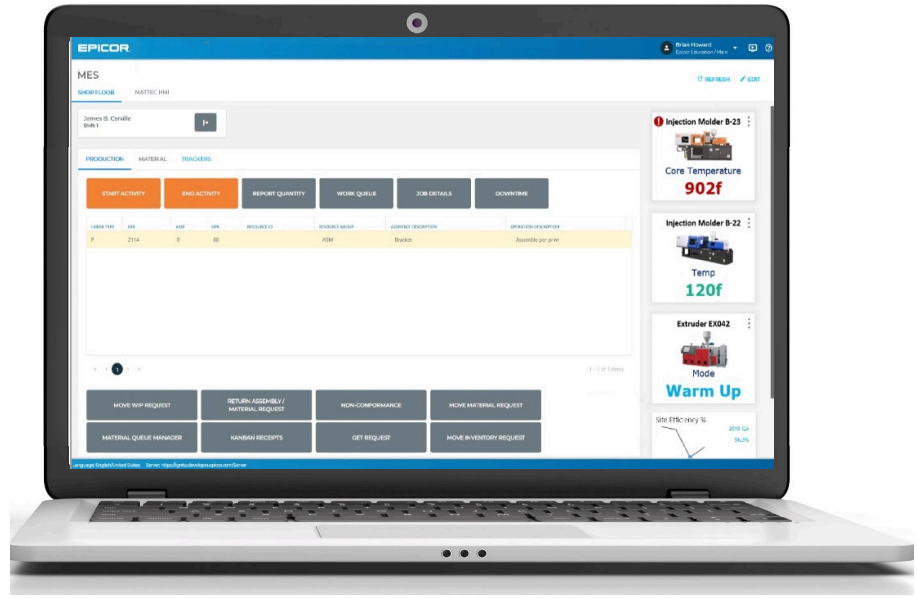
Subscription requirements

To promote use with Epicor ERP, Epicor is offering EVA usage for no charge until August 31, 2019. Please check with your account manager for more details.

Commercial terms (pricing and licensing) is not yet available for this solution. For these details, contact your customer account manager when the free period ends.

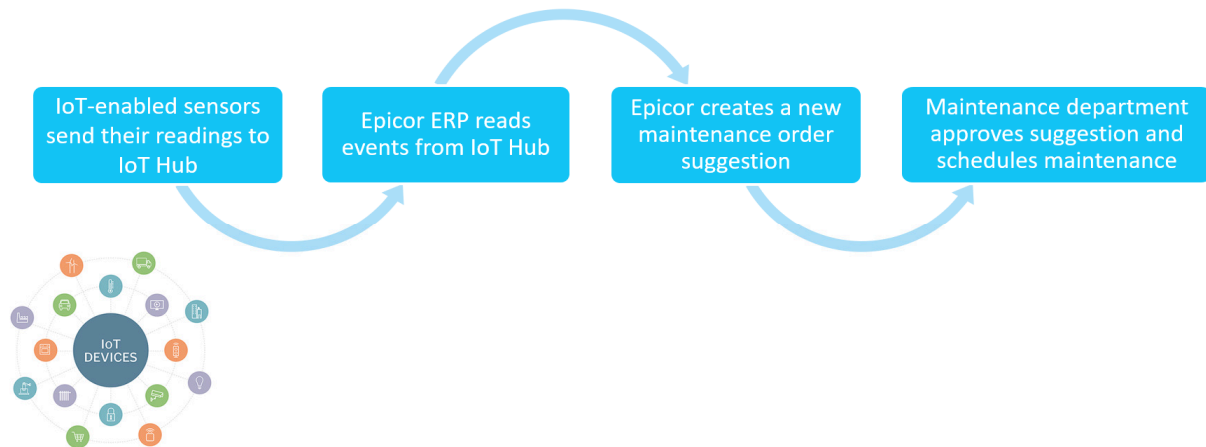
Epicor IoT

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.

Active Home Page Widgets

Achieve new levels of business visibility with the three new widgets available on the Active Home 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

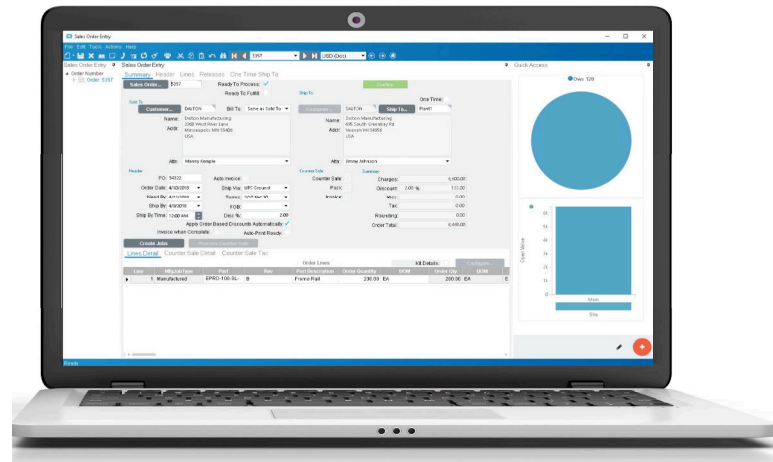
In addition to these new widgets, users can leverage the Promote feature to create a new tab for a widget. This increases the screen area available to display the widget's information.

Active Home Page Default Layouts

New applications of the Active Home Page, like the Manufacturing Execution System (MES), expand Epicor ERP's flexibility. The application can gather more data insights alongside inherent functions such as clocking in and out. Default Active Home Page templates can be used on each MES workstation for a single, cohesive look and feel across the plant floor. For example, this may make sense to use these global templates for consistent shipping and receiving interfaces.

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.



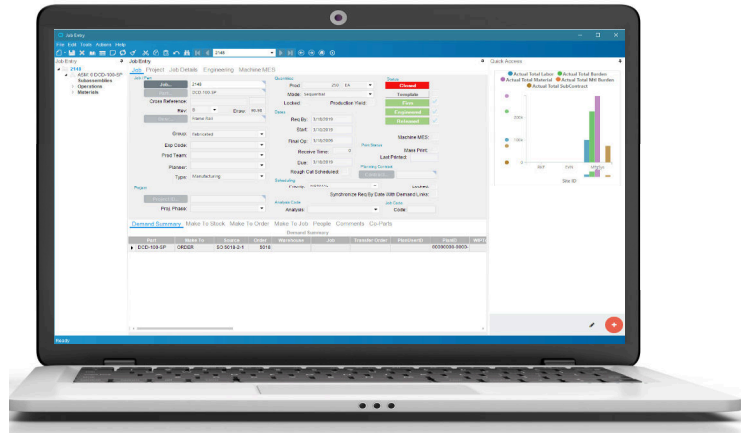
Epicor Data Discovery Improvements

Epicor Data Discovery (EDD) is a data visualization tool that displays real-time production data. With EDD, users can quickly spot areas of interest that they might have missed by just looking at rows and columns. In a Data Discovery view, users can set filters, measures, and dimensions to produce rich visualizations. They can create new views connected to their existing BAQs or, with the EDD Advanced license, connect to outside data sources.

The 10.2.400 release enhances the synergy between EDD and ERP with the following new features.

EDD sidebar display

Now you can work in an ERP form and see related EDD views at the same time. A sidebar display area, called the Quick Access panel, can display on most forms that allow customizations. Click the plus button on the panel and add one or more existing EDD views to the display. You can then look at data visualizations in context with the transactional detail. For instance, as you enter a sales order, the sidebar can display any overdue invoices for that customer. These “mini-dashboards” have multiple resizable views that you can open in the full EDD view for further analysis, filtering, and drill-down.



EDD Open With feature

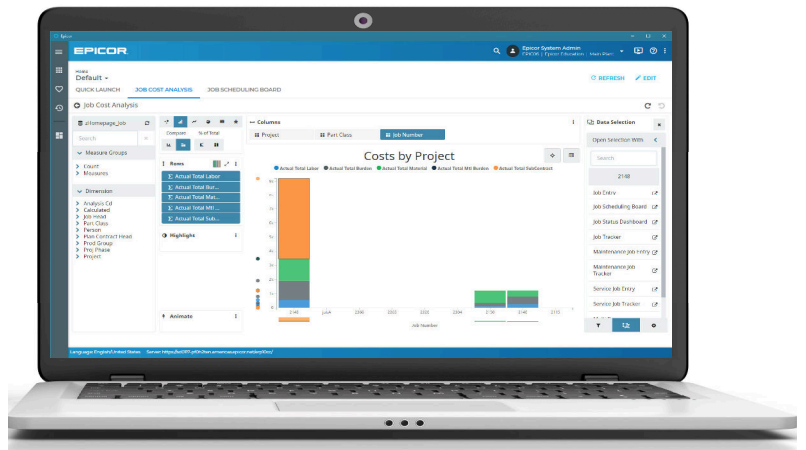
The Open With feature launches Epicor ERP forms and trackers in context with an Epicor Data Discovery view. If you see data that piques your curiosity or needs to be corrected, select it, choose Open Selection With, and select one of the available ERP form names, like Job Entry, AR Invoice Entry, PO Entry, and so on.

The Open With feature is also available in the Transactions panel below each view—select the transaction data that you want to see in the Epicor ERP form.

When you combine Open With and Sidebar Display, you have complete round trip analysis from EDD to Epicor ERP and back again. Users save time by not typing numbers and navigating menus to investigate transactions.

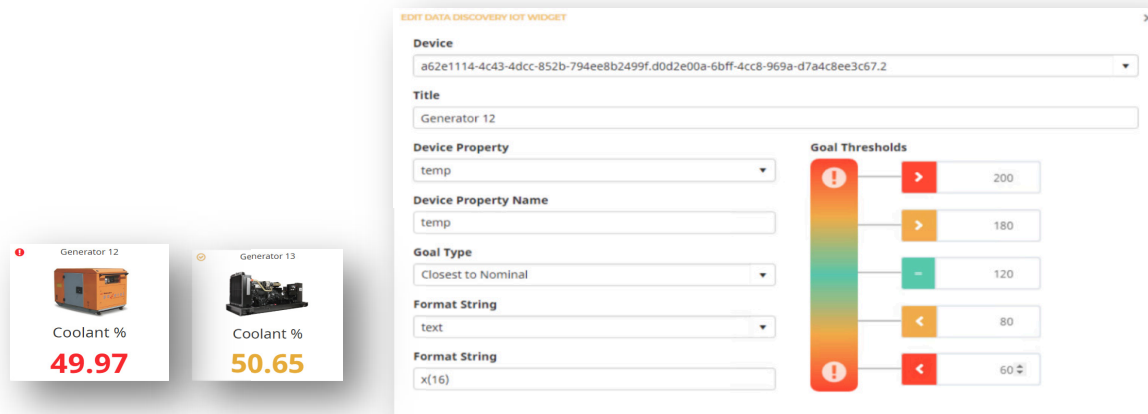
EDD Discovery Dashboard widget

Release 10.2.300 introduced EDD BI Dashboard, which combines multiple EDD views by cross-filtering and sharing dimensions between them. Release 10.2.400 now adds the “Discovery Dashboard” widget. Use this widget add an EDD BI Dashboard as a tab in Active Home Page. By just logging into their Active Home Page, users can see multiple live metrics personalized to their needs.



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.

EDD Project Management content

EDD content for the Project Management modules is available with this release. One BAQ tracks data at the project level, while another BAQ tracks the project phase level. These BAQs support the project WBS phases revenue recognition feature released with 10.2.400. Users can see real-time project statuses with views that show Budget vs. Actual, completion percent, and profit margins.

Note: For long-term project trending and analysis, refer to the new 10.2.400 Project Management content in Epicor Data Analytics (EDA).

EDD Import and Export

EDD now can import and export groups of folders, discovery views, and dashboards. Use this feature when you want to share EDD views with other Epicor ERP site installations in your enterprise.

Commercial terms (pricing and licensing) is not yet available for this solution. For details, contact your customer account manager at the general availability, planned for May 2019.

Epicor Data Analytics Improvements

Epicor Data Analytics (EDA) is a BI solution that delivers content packs for Epicor ERP financials, sales (with CRM quote pipeline), production, materials, Epicor Mattec® (Epicor Advanced MES). More content packs are released with 10.2.400.

Through this affordable, cloud-based subscription, you do not maintain the server or the application. You do not have to worry about the massive amounts of current and historical data are stored in a data warehouse. EDA's power is in its simplicity. The colorful chart and KPI widgets are easy to understand and filter, but for many users, the strongest feature is a widget's underlying analysis grid. Users can rapidly focus on an area and even drill down into the ERP transactions. This next section details the new EDA features released with 10.2.400:

EDA new features

- ▶ **Dashboard grids** – Resize and stack chart widgets, as shown in the illustration below. You can also move widgets from one line to another
- ▶ **Updated gauge charts** – These charts display the numbers behind the percentages. For example, if you look at a variance percentage, the widget can also display the current and previous values that calculate this percentage. It works great with actual vs. budget displays
- ▶ **Embed view** – Share a dashboard through this alternate method. First, create an embed view link and either send it to a co-worker or embed in a web page. When users click the link, they login with their EDA ID and password and then see the dashboard. Since you shared the view, your name is listed at the top. These users then can focus on data, open individual widgets, and launch the entire dashboard
- ▶ **Subscriptions** – When you subscribe to favorites, you can now set it up to only receive an email when the condition turns red or yellow. This cut down on emails you don't need
- ▶ **Data Designer** – You can now add additional transaction information to better understand what a field displays. For example, Part Type might show in your analysis grid as a code, but now you can add more descriptive information to it.
- ▶ **Custom Date** – Enter a custom date to see up-to-current-date measures such as year-to-date totals, margins, quantities, and other key values.

EDA new and updated content packs

- ▶ **Production Content Pack (updated)** – This content is now available:
 - **Project Management content** – This release includes both project level and a project WBS phase business activity queries (BAQs). These BAQs support the 10.2.400 project WBS phases revenue recognition feature.



Users analyze current and long-term project trends through key indicators like schedule, milestones, and progress percent. These values display the current state of the project and help determine present and future challenges.

Note: For real-time project monitoring, refer to the 10.2.400 Project Management content in the Epicor Data Discovery (EDD) section of this document.

- **Enhanced Production content**— Adds a Labor BAQ and dashboard. Production managers can use this view to understand jobs and production, including rework reasons, resources with issues, produced quantities, scrap quantities. This data displays by employees, shifts, departments, and labor hours, they show downtime and the downtime reason codes. Use these analytics to gain efficiencies and reduce shop floor waste. They help you understand where your shop floor spends time and money that goes directly to the bottom line.
- ▶ **Materials Management Content Pack (updated)** —Contains both a bill of lading and serial numbers BAQs and dashboard. Through this content, you slice and dice data by package, truck, base weight, rate, and more. You then drill down to look at specific serial numbers for a part within that bill of lading. Look at the bill of lading counts by the customer, supplier, plant, etc. Manufacturers can then track down serial numbers for quality issues.
- ▶ **Field Service Content Pack (new)** — Adds a service call BAQ and dashboard. A user can then see the customers, parts, service call type, and warranty eligibility included with each service call., These views then summarize totals, call counts per service representative, and other indicators. These content pack also includes a service profit BAQ and dashboard that shows sales margins and total costs by customer. This dashboard helps managers determine the profitability of their service organizations.
- ▶ **Preventive Maintenance Content Pack** — Use the Equipment Maintenance BAQ and dashboard to explore equipment maintenance information by supplier, jobs, plant, open requests, and closed requests. This data can help preventive maintenance service and the average response time for issues. You can then see where problem areas are holding up production.
- ▶ **Mattec (Epicor Advanced MES) Content Pack (updated)** — Mattec content gives you powerful metrics to improve production performance—including overall equipment effectiveness (OEE), run rates, scrap, yield, energy consumption, material consumption, and much more. Accurate, machine-related data helps to pinpoint critical issues, reduce waste, improve quality, and enhance customer service. Originally released with Epicor ERP 10.2.300, this 10.2.400 update streamlines and validates the data it displays.

Note: All EDA Epicor ERP content packs—except for Project Management—work with all Epicor ERP versions starting at 10.1.500 and forward. The Project Management content is certified for 10.2.400.

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

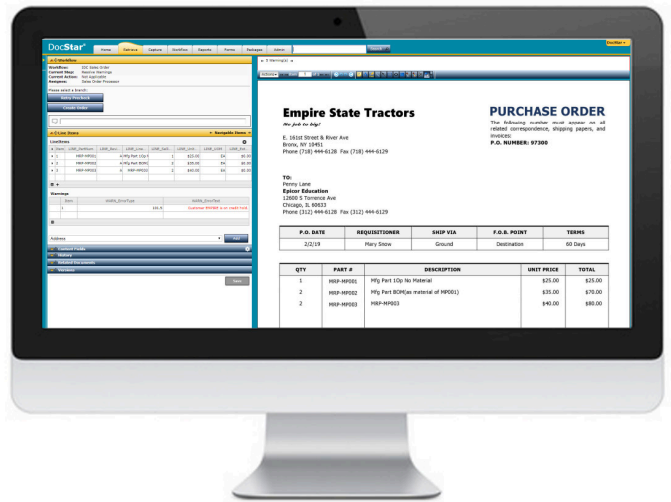
Sales and Marketing Management

Sales Order Automation

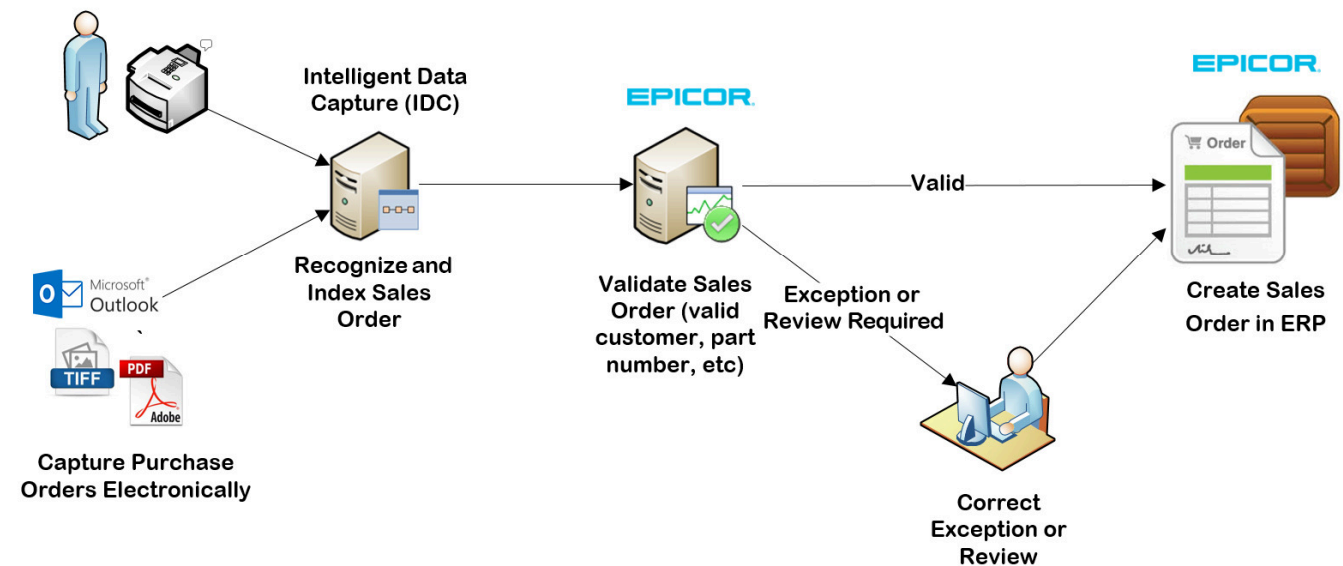
Capture, validate, route, automate, integrate

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.



**Scan Purchase Orders
Scanner/Multifunction Copier**



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.

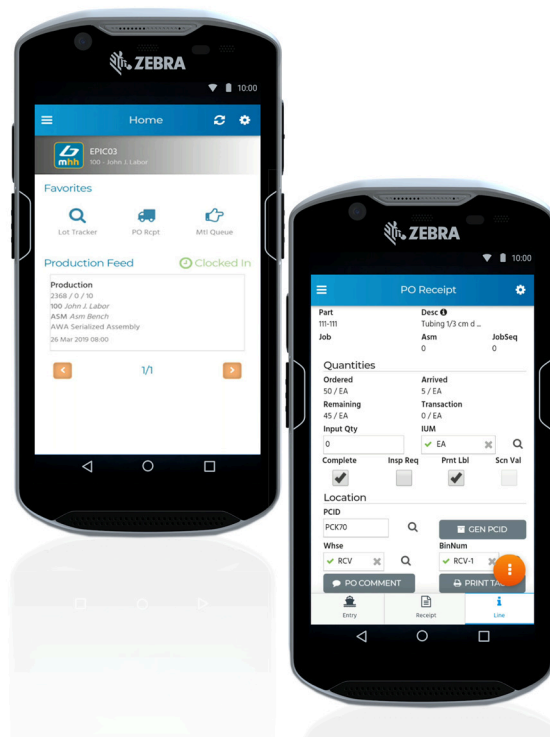
Material Management

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.

Epicor Commerce Connect – Supplier Portal

Driven by the rapid growth of eCommerce, your suppliers have increasingly high expectations when interacting with your manufacturing brand. As our personal lives blend with our professional lives to drive technology expectations and brand experiences, suppliers expect a pleasant online experience, easy-self-service, great selection, rapid and convenient delivery on their terms, personalized offers, high product quality, excellent customer service, and transparency/ visibility into your brand. By improving collaboration with your suppliers, the Epicor Supplier Portal builds on previous eCommerce innovations—such as the Dealer Network Portal—to support an expanding omnichannel commerce strategy that reduces customer lead-times, increases quality, and enhances your customer experience.

Introducing with Epicor ERP 10.2.400, the Epicor Supplier Portal is built on Epicor Commerce Connect. The application makes it easier to communicate with your suppliers and expands on the previous Supplier Connect™ module. REST handles the communication between Supplier Portal and Epicor ERP, so the connection is flexible, secure, and fast. Customers can upload part attachments, limit attachment types, and expand UD Fields and UD messages with Supplier Portal messages. You also no longer need the Epicor ERP 10 Credit Card module to process fully paid credit card orders.



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

NEW REPORT Stock Movement Report

This report identifies inventory movement. This report is required for some international country-specific functionality (CSF) packages.

NEW REPORT Stock Aging Report

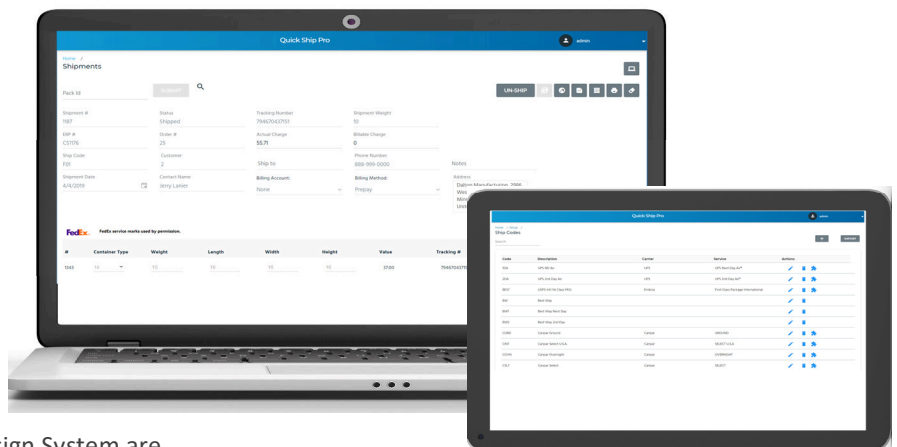
This report offers the last time a purchased or manufactured part moved in inventory. This report is required for some international country-specific functionality (CSF) packages.

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.

Miscellaneous Shipments from WIP

Miscellaneous shipments can now be sent from WIP, giving you more shipping flexibility. Miscellaneous Shipment Entry has the Create Shipment from WIP option. Use this option to ship quantities from any job that has a demand link set to Misc Shipment from WIP.

Customer Shipment Entry - Ship a Stocked Package Control ID (PCID)

Package Control simplifies how you receive, ship, and stock products grouped on a pallet, in a box, or in another packaging system. Epicor ERP identifies these grouped products using a PCID.

Prior to this release, PICD shipping workflow was only done through the Fulfillment Workbench. Now within Customer Shipment Entry, users can identify a PCID on the shelf and directly ship it. This feature also works with multi-level PCIDs. When you add a stock non-picked multi-level PCID to a pack for a sales order, Epicor ERP ships the entire PCID along with any child PCIDs contained within it. If the parts are further identified with serial numbers and lots, these values automatically go with the shipment.

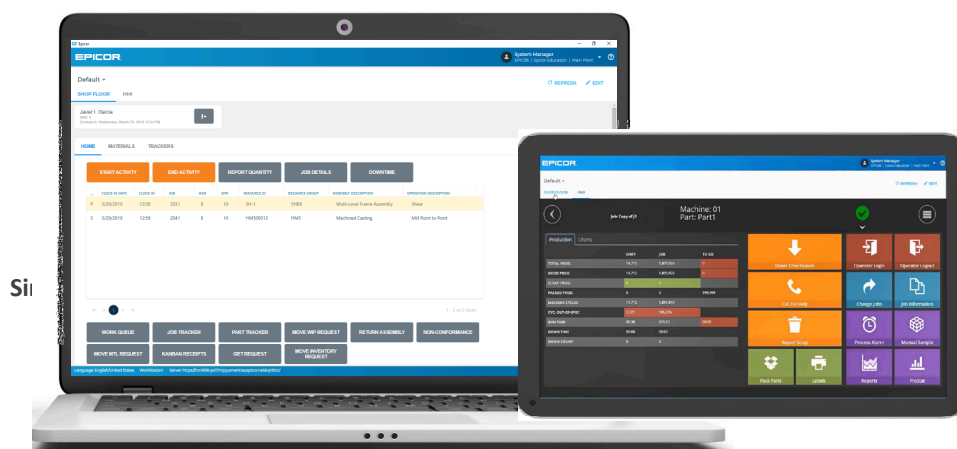
Production Management

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

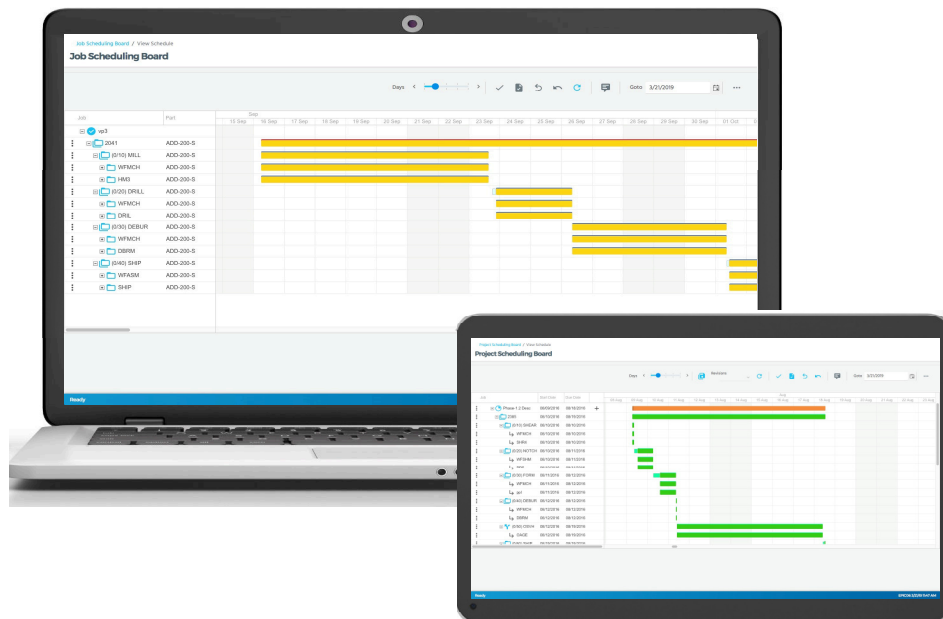
Customers that are using the Epicor ERP IoT Module can use Epicor Data Discovery IoT visualization widgets in the Kinetic MES interface and the Active Home Page.

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.

Advanced Quality Management (AQM)

The newest release of Advanced Quality Management(AQM) is powered by IQS Trubox™. Built on the IQS Trubox™ platform, AQM is a next-generation application that provides rapid user on-boarding. AQM users can personalize their mobile workspaces and review data instantly through built-in analytics and on-the-fly charts. By leveraging the IQS Trubox™ platform, users move beyond data management to act on real-time data. IT can easily

expand and business systems can successfully integrate with AQM as well, as it has an extendible architecture engine.

Engineered by quality professionals and reviewed by customers, the latest release of AQM remains faithful to its roots by ensuring organizations can rely on out-of-the-box, best-practice EQMS core tools for easy, rapid deployment. The IQS Trubox™ platform builds on these core objectives by leveraging a new open plugin and integration tool. Users can then more easily connect and integrate AQM with other enterprise data sources.

AQM delivers features including:

- ▶ Mobility enabled
- ▶ Visual embedded analytics
- ▶ User definable workspaces
- ▶ Configurable, rule-driven forms
- ▶ Field level security & validation
- ▶ Real-time list grid updates
- ▶ One-click enterprise search
- ▶ Social interactivity and notifications

Manufacturers can streamline Audit Management, Nonconformances, Corrective and Preventive actions using AQM built on IQS Trubox™. These tools handle engineering change notices, track customer complaints, control statistical processing I, ensure supplier quality, analyze failure modes and effects, manage documents, run first-article inspections, manage production part approval processes, maintain equipment, calibrate gauges, manage training, and track compliance.

Through these connected capabilities, manufacturers can intelligently gather data when executing continuous improvement initiatives and satisfying quality standards -- such as ISO 9001, TS 16949, AS 9100, ISO 14001, ISO 13495, and FDA & GxP.

IQS developed the IQS Trubox™ platform using JAVA with Web Services architecture and HTML5/CSS. Trubox™ has a visual integration utility. Trubox™ supports MSSQL, MySQL and Oracle database platforms, and it also supports hot deployments for updates.

AQM built on IQS Trubox™ integrates with EQMS to ensure compliance, bolster quality, and initiate continuous improvements. This version is available to Epicor AQM Client Server and Web users through a current maintenance agreement.

Commercial terms (pricing and licensing) are available for this solution. For these details, contact your customer account manager.



Project Management

Epicor Mobile Expense Management

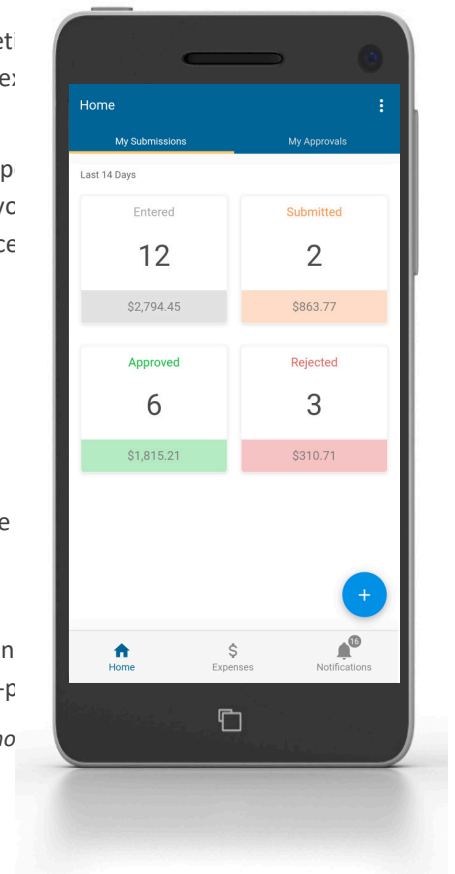
Mobile Expense Management is an application built for Epicor ERP that uses the Kinetic Expense Management module by giving users the mobile modern, intuitive user interface to effectively control expenses.

Through Mobile Expense Management, you get full control and visibility into your expense processing. Provide your project managers and their teams, frequent travelers, and you to capture expense entries and approvals—anytime, anywhere— through an interface. 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
- ▶ Manage multiple currencies and tax liabilities
- ▶ View data in offline mode

Epicor Mobile Expense Management is compatible with Apple and Android devices 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.



Epicor Mobile Time Management

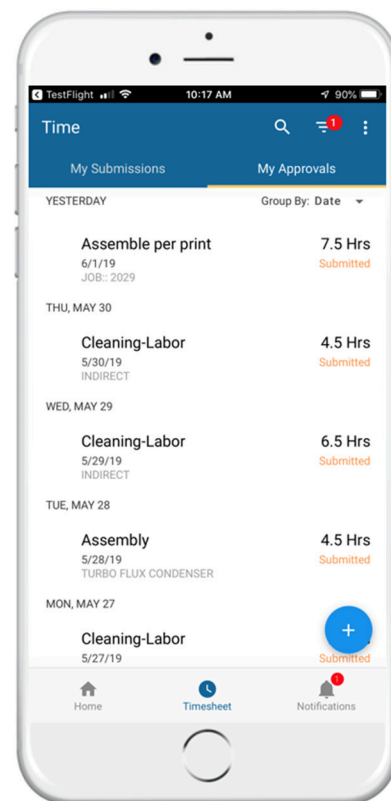
Mobile Time Management is an application built for Epicor ERP that uses the Kinetic Design System. It extends the Time Management module by giving users the mobile modern, intuitive user experience they need to effectively report, track and approve time.

Through Mobile Time Management, you get full control and visibility into your time tracking and processing. Provide your project managers and their teams, field service technicians, and your production supervisors with the ability to capture timesheets—anytime, anywhere—through an interface that simplifies the process. With Mobile Time Management, you can:

- ▶ Report time on a daily or weekly basis
- ▶ Enter time against service jobs, projects or indirect time
- ▶ Fast approval process for managers and supervisors
- ▶ Use quick codes for repetitive entries
- ▶ Upload photos as attachments
- ▶ In-app notification to track changes
- ▶ View data in offline mode

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



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.

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.
$$POC = (Delivered\ Qty) / (To\ be\ Delivered\ Qty) * Contract\ Amount.$$

Financial Management

Asset Part – Serial Numbers

Asset Management is enhanced to manage serial tracked parts in the Asset Posting and Disposal processes. By precisely tracking serialized assets and components, you improve efficiency and reduce costs for managing these assets.

NEW REPORT Booking Voucher Reports

Oversight on bookings is now easier with two new reports. The Booking Voucher and the Booking Voucher FC reports display journal transactions for a selected year and period range.

Ability to Recalculate Inter-Company AP Invoice Taxes

Taxes are normally transferred from the sending company and not calculated by the receiving company. If you select the Recalculate Inter-Company AP Invoice Taxes option, the receiving company recalculates the taxes and disregards the transferred taxes.

Calculate Multiple Taxes from Tax Liability in AP Payment Entry

When you create miscellaneous AP payments or pre-payments which have multiple tax liabilities, Epicor ERP now calculates all taxes and populates the values in the Payment Sales Tax grid.

Calculate Multiple Taxes from Tax Liability in Cash Receipt

When you create miscellaneous cash receipt payments which have multiple tax liabilities, Epicor ERP now calculates all taxes and populates the values in the Miscellaneous Payment Tax List.

ICE Framework and Tools

Epicor ERP REST Services Version 2 on OData 4

Epicor REST services offer flexibility for integrating and accessing Epicor ERP data and services. Developers today expect the easy connectivity REST provides, especially in cloud deployments. Originally released in 10.1.500 and 600, REST is

- ▶ Easy to use – builds complex connections in minutes not hours
- ▶ Secure – easily shares controlled connections with Partners and Customers
- ▶ Efficient – Other integration methods cannot handle large volumes of data, but REST supports these levels of data.
- ▶ Comprehensive – System-wide availability delivers a rich toolset that supports most data connectivity demands

Rest Services 2.0 extends REST capabilities to improve API compatibility, ease of use, security, and tracking. With release 10.2.400, users have this functionality:

- ▶ Compliance with OData 4
- ▶ More context in the URLs
- ▶ Explicit company and plant (site) context instead of automatic detection
- ▶ API keys with Access Scopes and telemetry

Security – API Keys

Configure Epicor REST APIs to use API keys for deeper security and traceability. Generate API Keys for each REST application or integration. They restrict calls to specific APIs which use an access scope.

You can share API keys with trusted sources such as partners and customers to provide locked access to REST APIs. These external integrations can only perform the required actions. API Keys ensure that users with broader customization rights may only perform actions that both the user and the API key can access.

Security – Access Scope

Setting up security can be confusing, tedious, and time-consuming, especially while defining access for user groups. Epicor ERP now has Access Scope capabilities that sit between the authentication layer and user(group) security. These capabilities identify what service methods and Business Activity Queries (BAQs) are available, instead of requiring you to identify everything that is not available.

Access Scopes can be assigned to individual users, but they are mainly for service accounts where an external application communicates with Epicor ERP Services through a common User ID. The Access Scope is attached to an Epicor application server and combined with Epicor ERP API keys to further authenticate the application or the third party requesting the service.

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.

Improvements to Existing CSFs

Several country-specific functionality (CSFs) packages are improved in 10.2.400. See the feature summary for a complete list of updates for these countries:

- ▶ Argentina
- ▶ Colombia
- ▶ Norway
- ▶ Peru

- ▶ Finland
- ▶ Germany
- ▶ India
- ▶ Malaysia
- ▶ Mexico
- ▶ Netherlands
- ▶ Poland
- ▶ SEB
- ▶ Sweden
- ▶ Thailand
- ▶ United Kingdom
- ▶ United States
- ▶ Vietnam

Third-Party Applications and Integrations

Support continues for a range of related applications in the manufacturing, distribution, and services sectors. Most of these third-party applications support global enterprises, but some do not. During implementation, the Epicor team will work with you to determine which third-party solutions are appropriate for your business needs.

Epicor 10.2.400 supports the following products:

- ▶ Epicor AgileShip Manifest from Agile Network, LLC
- ▶ eVision® from TIE Kinetix
- ▶ Epicor Precise Point of Sale from Precise Business Solutions
- ▶ Epicor Advanced Requisition Management from Precise Business Solutions
- ▶ CADink™, ConfigLink, and ECN Manager from QBuild Software Corporation
- ▶ Epicor Product Life Cycle Management and Product Data Management from PROCAD GmbH & Co. KG
- ▶ Epicor XL Connect from Biznet Software Inc.
- ▶ Epicor Cash Collect from e2b Teknologies, Inc.
- ▶ Epicor Financial Planner (EFP) from DSPanel AB
- ▶ Epicor EPM Performance Canvas from DSPanel AB
- ▶ Epicor Knowledge Mentor from SAP SE
- ▶ Epicor Data Analytics from Phocas Ltd
- ▶ Microsoft® SSRS from Microsoft Corporation
- ▶ Epicor Advanced Quality Management from IQS, Inc.
- ▶ AutoVue® from Oracle Corporation
- ▶ BarTender® from Seagull Scientific, Inc.
- ▶ SAP® Crystal Reports® from SAP SE
- ▶ Epicor Tax Connect from Avalara Inc.
- ▶ SmartForecasts® and Smart Inventory Planning and Optimization from Smart Software, Inc.
- ▶ ForecastPRO® for Epicor from Business Forecast Systems, Inc.
- ▶ XSOL InOrder from XSOL, Ltd.
- ▶ Workforce Now® from ADP, LLC
- ▶ Epicor Mobile Warehouse from Biscit, PTY LTD.

Compatibility

Epicor 10.2 has been tested on the latest releases from Microsoft—including Windows 10, Microsoft Internet Explorer 11, Microsoft SQL Server® 2017, and Windows Server 2019. This version 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.

Support for Windows Server 2019

This release introduces support for Windows Server 2019.

Upgrading to 10.2

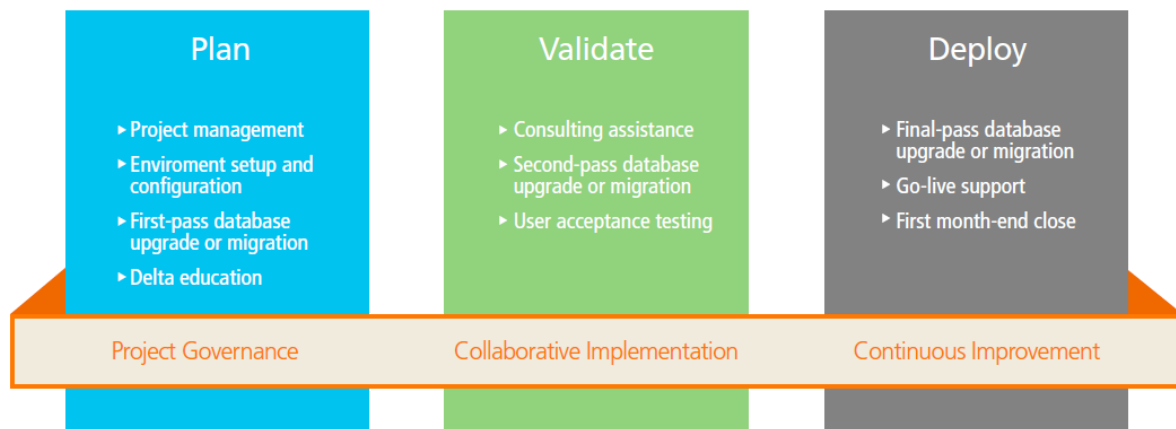
At Epicor, we firmly believe all users gain significant benefit by upgrading to new versions of the Epicor ERP software. For users on the Epicor ERP 10 platform, the upgrade process is simplified so you can move between releases without stepping through each one. For example, users can move from 10.1.400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

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

Upgrade program

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

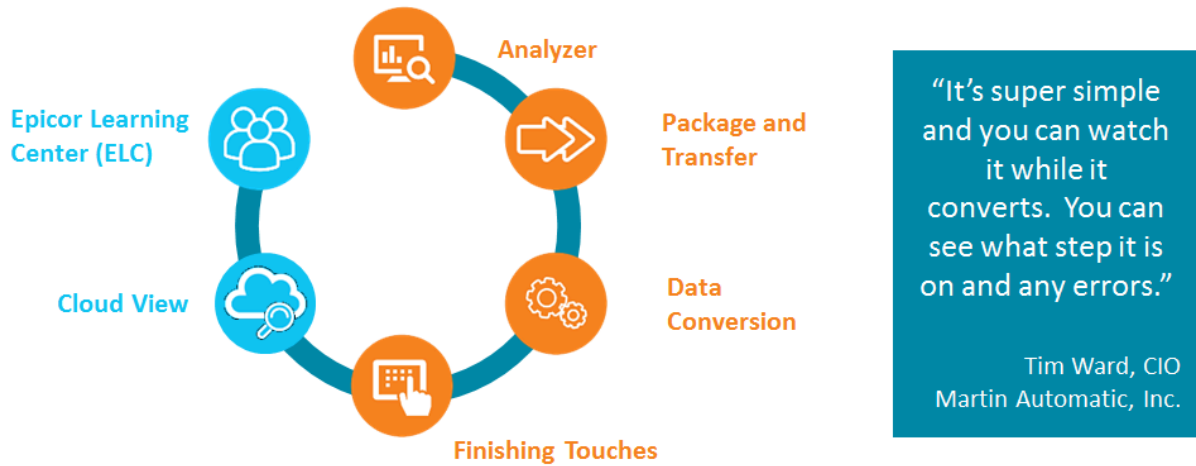
Upgrade Signature Methodology



The upgrade process incorporates a methodology for moving to the latest Epicor ERP release. The upgrade program incorporates the elements from the upgrade Signature Methodology to provide the assistance your business may need—including technical consulting, modification services, reporting services, configurator services, EDI Services, Epicor University, and onsite business consulting.

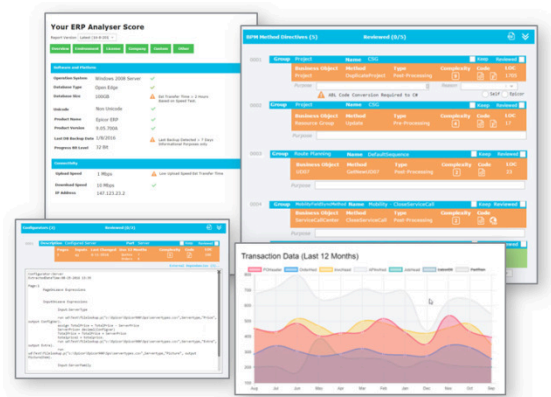
Cloud upgrade tooling and services

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



Analyzer

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



Packager/Transfer

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

Data upgrade

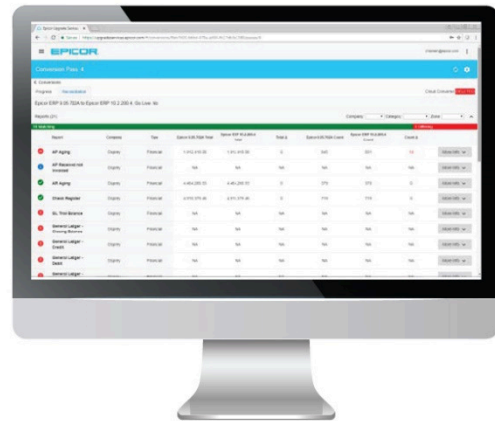
A single solution performs analysis and resolves the issues before running the data migration. In the past, separate processes were required that involved user intervention before data was migrated.

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

Reconciliation Reporting

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

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



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

Epicor Learning Center Upgrade Essentials courses

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

Cloud upgrade tooling and services availability

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

*Customer Account Manager (CAM)

Epicor Support

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

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

Application Support (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.

New Support Offering: ECC 24X7 Support

For customers using Epicor Commerce Connect (ECC) in a cloud or hosted environment, Epicor Support is making a new service available, to address the critical need of continued availability and operation of their online sales. For an additional fee, 24x7 Support for ECC enables customers to get the support they need regardless of time of day to ensure business continuity. To learn more about how this service works, please complete a [Service Plan Request Form](#).

New Support Offering: Extended Support

Extended Support is being made available, for an additional fee, for some releases of Epicor ERP. Extended Support extends a Customer's access to key support elements while allowing them to complete their upgrade to an Active Release. The service includes the following:

- One year of Extended Support – starting from the first day the product release (Extended Support Release) moves to Sustaining Support, continuing for a period of 12 months (there is no renewal available currently, and the Extended Support plan expiration date is independent of the Customer's Epicor support and maintenance plan)
- Severity 1 and Severity 2 bug fixes for the Extended Support Release
- Telephone support during the standard support hours

If you are interested in more information on Extended Support, please complete a [Service Plan Request Form](#).

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

User Groups

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

Epicor University

Epicor University provides learning tools, content, and training opportunities that enable you to achieve your business goals. The suite of tools available offers comprehensive training options that align to the different learning styles and needs of your employees. The below graphic represents content that is new for our 10.2.400 release across our learning resources:



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

What's New for Epicor ERP 10.2.400?

Epicor University
Knowledge is power | Unlock your potential



Knowledge on Demand

For quick answers to in-app questions, check out our Knowledge on Demand (KOD) videos—now built directly into your ERP solution. These short videos are between one to two minutes long and help you solve problems quickly. You can access KOD videos throughout the product, simply look for the Video Help icon directly on the program toolbar in various forms such as the Scheduling Boards and the 10.2.400 Active Home Page. We're adding new content all the time, so check back often.



Supply Chain and Manufacturing

- ▶ What's New in Epicor ERP 10.2.400 •
- ▶ Epicor Delta Manufacturing 10.2.400 •
- ▶ Exploring the Scheduling Boards in Epicor ERP •
- ▶ Searching for Records in Scheduling Boards •
- ▶ Using the Toolbar in Scheduling Boards •
- ▶ Adjusting Schedules in Scheduling Boards •
- ▶ Understanding Project Structure in Project Management •
- ▶ Entering Quotes in Dealer Portal •
- ▶ Accepting Dealer Portal Quotes in Epicor ERP •
- ▶ Entering Claims Through Dealer Portal •
- ▶ Processing Dealer Portal Claims in Epicor ERP •
- ▶ Location Ownership in Epicor ERP •
- ▶ Location Ownership in Dealer Portal •
- ▶ Fulfilling Dealer Portal Sales Orders in Epicor ERP •
- ▶ Project Management •
- ▶ Scheduling •



Foundations

- ▶ Meet the Players •
- ▶ Epicor ERP—Pleased to Meet You, I'm Sure •
- ▶ Using Menus and Toolbars •
- ▶ Using Grids and Grid Tools •
- ▶ Understanding the Tree View •
- ▶ Working with Sheets •
- ▶ Using Searches •
- ▶ Entering Data •
- ▶ Printing Forms and Reports •
- ▶ Using Trackers to View Information •
- ▶ Personalizing Epicor ERP to Make Yourself At Home •
- ▶ Getting Started With the Active Home Page •



Finance

- ▶ What's New in Epicor ERP 10.2.400 •
- ▶ Epicor Delta Financials—10.2.400 •
- ▶ Asset Management •



Tools

- ▶ What's New in Epicor ERP 10.2.400 •
- ▶ Epicor Delta Tools 10.2.400 •
- ▶ Understanding Cloud Basics •
- ▶ Introduction to Epicor REST Services •
- ▶ Advanced Epicor REST Services •
- ▶ Epicor Data Discovery •

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

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

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New education courses available

In addition to the courses developed and updated to support 10.2.400, Epicor University has introduced two new courses. These courses help users take advantage of REST services to build stronger, more upgrade resilient integrations with Epicor ERP.

- ▶ Introduction to Epicor REST Services v.1 – Attendees learn how to use Representational State Transfer (REST) services for interaction with Epicor ERP.
- ▶ Advanced Epicor REST Services v.1 – Attendees explore REST-based scenarios of integration with Epicor ERP.

Foundations courses reimagined

Whether you're new to Epicor ERP or onboarding a new employee, the foundations courses provide the basics for ERP. These courses are improved to meet the needs of today's workforce

About Epicor

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